

CHAPTER 1

DOCUMENT DESIGN AND LAYOUT

INFocus

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When producing documents in Word, it is important to consider the overall design and layout of your document. A well-designed document will be attractive to the reader and will improve readability.

There are several design principles that you should be aware of when designing documents to ensure that you create professional-looking documents.

In this session you will:

- ✓ gain an overview of the different types of business documents
- ✓ gain an understanding of the different types of software available for producing business documents
- ✓ gain an overview of who prepares business documents
- ✓ gain an overview of the various ways of speeding up document production
- ✓ gain an understanding of aspects to consider when developing document standards
- ✓ gain an understanding of meeting organisational requirements
- ✓ gain an understanding of the four basic principles of design
- ✓ gain an understanding of document layout
- ✓ gain an understanding of white space
- ✓ gain an understanding of typeface
- ✓ gain an understanding of visual elements
- ✓ gain an understanding of rules and borders
- ✓ gain an understanding of headings
- ✓ gain an understanding of page layout
- ✓ gain an understanding of computer graphics
- ✓ gain an understanding of colour
- ✓ gain an understanding of document writing aspects.

TYPES OF BUSINESS DOCUMENTS

A business must communicate with its customers, employees, suppliers, the government, and other businesses. This communication is mostly done through a variety

of business documents. As a result there are a large number and variety of documents produced by businesses.

A good way to understand the types of business documents produced in organisations is to examine the needs and requirements of the various parts of an organisation, and to group documents according to the functions performed.

Management

Management requires documents that help it make business decisions and help it keep the business running. These types of documents include:

- Production reports
- Sales reports
- Meeting minutes

Sales and Marketing

Sales and Marketing require documents that help promote the business and its products to the customers. These types of documents include:

- Price lists and order forms
- Product brochures
- Sales reports
- Bulk mail-outs to customers

Human Resources

Human Resources deal with a variety of matters regarding employees. They require a very broad range of documents including:

- Job descriptions
- Employment forms
- Training manuals and guides
- Job procedures

Manufacturing and Production

Manufacturing and Production produce the goods and services sold by the business and require documents that help them produce these goods and services on time and in the most cost-effective manner. The types of documents they require include:

- Production reports
- Supplier price lists and forms
- Product specifications and procedures

Administration and Accounts

Administration and Accounts are responsible for ensuring that the day-to-day operation of the business proceeds smoothly, that customers are invoiced, that bills are paid, that money is collected and banked, and the like. They require a variety of documents including:

- Memos, faxes and letters
- Sales reports
- Accounting reports

CHOOSING APPROPRIATE SOFTWARE

The large number of documents required for businesses to operate can be produced by a variety of software packages and applications. In fact, many of the documents can be produced by

more than one type of software application. It is useful to know about the role and function of the various software applications.

Type of Document	Typical Software Application(s)	Level of Sophistication	Comments
Production reports	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Specialised production software 	Low	For internal communication only
Sales reports	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Accounting software 	Low	For internal communication only
Meeting minutes	<ul style="list-style-type: none"> • Word processing 	Low	For internal communication only
Price lists	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Accounting software • Desktop publishing software 	Medium	For internal use as well as external communication to customers
Order forms	<ul style="list-style-type: none"> • Word processing • Desktop publishing software 	Low	For customer use
Product brochures	<ul style="list-style-type: none"> • Word processing • Desktop publishing software 	High	For customer use
Merge letters	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Accounting software 	Medium	Used to communicate to customers
Job descriptions	<ul style="list-style-type: none"> • Word processing 	Medium	For prospective job applicants
Employment forms	<ul style="list-style-type: none"> • Word processing • Desktop publishing software 	Low	For internal use only
Job procedures	<ul style="list-style-type: none"> • Word processing 	Low	For internal use only
Supplier price lists	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Accounting software 	Low	For internal use only
Product specifications	<ul style="list-style-type: none"> • Database • Word processing • Accounting software 	Medium	For customer use
Memos, faxes, letters	<ul style="list-style-type: none"> • Word processing 	Low	For internal and external communication
Accounting reports	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing 	Low	For internal use

WHO PREPARES BUSINESS DOCUMENTS?

With such a diversity of business documents in use today, and with a variety of software applications available to create these documents, it is obviously not possible for one person or

department to assume total responsibility for document preparation. So, who does prepare documents in a business?

Standard Business Documents

Standard business documents are relatively simple in layout, and are authored, printed and distributed by the same person within a company. These documents are usually memos, letters, faxes, minutes of meetings, and the like. The focus is more on the content and the subject matter than on the layout and overall appearance of the document.

These would form the bulk of the documents produced within a company.

These documents are usually produced on a personal computer or laptop and printed on the author's printer. Increasingly, these documents are circulated internally via email rather than through the mail system.

Large companies often have directives that specify how these documents should be laid out. In small to medium companies, however, the look and layout of these documents is less formal and left to the discretion of the author. Many authors simply use the templates found in word processing applications to assist them in the layout of these types of documents.

Specialised Business Documents

Specialised business documents are by nature more complex and difficult to produce. These types of documents are usually colour brochures promoting the company and its products, annual reports for shareholders and investors, and the like. Often they incorporate pictures and artwork (graphics), and are produced as full-colour documents on high quality paper.

These documents are usually produced by a team of people. Some of these people work within the company, while others are contracted by the company to perform a specific job. For example, the content is usually prepared by people within the company that are expert in the products and services of the company. However, these people do not usually have professional design and printing skills so these aspects of document production are outsourced to an external company that specialises in layout, design and printing.

Generally, there are three steps to the production of these types of documents.

1. The text (also referred to as the 'copy') is prepared by the subject experts within the company.
2. The text, relevant pictures and general information about the purpose of the document is handed over to a designer to lay out the design, choose the appropriate colours and fonts, and so on.
3. The completed document is then provided in an electronic format to a printing company that prints the document in the quantities required by the company.

Naturally, there should be someone within the company who manages and coordinates this process. If these documents are for sales and marketing purposes, it is usually someone from the marketing department who undertakes this role.

SPEEDING UP DOCUMENT PRODUCTION

Most software applications that are used to produce business documents contain a number of features that can speed up the production of documents. There are also things that can be

done within a company to ensure efficient and fast document production. Some of the software features and company tasks are detailed below.

Features Found In Software

Macros

Originally, macros were simply recorded keystrokes that could be stored and executed over and over again. These were used for the production of documents, or parts of documents, that remained the same from document to document. The keystrokes, such as a series of sequential steps to complete a specific task or perform an action, were recorded when the first document was created. They could then be replayed to create more of the same types of documents. Today, macros still perform the same role. However, they are now based on sophisticated programming commands and languages and, while still relatively easy to use, offer much more power than earlier keystroke macros.

Themes

Themes let you create professional-looking documents with a co-ordinated set of colours, fonts and backgrounds in a flash. By applying one of the 40 built-in themes you can change the overall look of your document immediately. To make the best use of themes, however, you will need to apply **styles** (via the **Home** tab) to the various elements in the document.

Templates

One of the most tedious tasks in document production is designing the layout and overall presentation of a document. A template allows you to create a document based on an existing design and can save much production time. Templates can also be created from an existing document. The existing document is converted into a template and the design of that document can then be used to produce future documents.

Styles

Longer documents require consistency in the look of their headings, text, tables, and the like. **Styles** in word processing applications allow you to store a set of formatting attributes and then apply that formatting to different parts of the document. For example, you can create a style for main headings that consists of a range of formatting attributes, such as a specific font style, font size, adjusted paragraph spacing, etc. You can then apply that style to any text that you want to use as a main heading. If you later want to change the way those headings look, you only need to change the style and all of the headings will automatically update. Styles can save a considerable amount of time in document production.

Building Blocks

You can recycle content that you use constantly in your business, such as contracts, agreements, procedures and the like, by creating and using building blocks. For example, you might save your company's contact information as a building block in the **Quick Parts** gallery, and whenever you require that information, you can simply open the **Quick Parts** gallery and select the desired building block.

Speeding Up Document Production

Guidelines and standards

One of the most time-consuming aspects of document production is deciding how you want it to look – what fonts to use, colours, margin settings, headers, footers, and so on. It is extremely beneficial for any company to have a set of procedures and guidelines that define these aspects of document production for authors. Every company, even the smallest, will decrease production time by having a set of standards in place. In addition these should be incorporated into a standard set of company templates (see above) which can be easily accessed by authors.

ESTABLISHING DOCUMENT STANDARDS

It is important for all companies, both small and large, to have a set of guidelines and standards in place for document production and handling. These guidelines ensure a consistent look and

feel amongst the documents, allow new employees to become quickly acquainted with document production, and convey a professional image of the company to its customers and clients.

Things To Consider When Developing Document Standards

Storage

It is important that company documents can be located and accessed by relevant people. Documents can be stored on a personal computer or on a network server. If company documents are stored on a personal computer, and if those documents are to be made available to other users, then the documents should be stored in shared folders that are accessible to other users on the network. Generally, it is advisable for public documents to be placed on a network server if one exists. Some liaison with the network administrator may be necessary to ensure that document authors have appropriate access rights to the network.

Folder and file naming

It is important that the company implements a standard for file and folder naming. Using proper guidelines ensures that important documents can be found easily in the future. A handy technique used in document production is to include the file name and folder path somewhere in the document. This can be in the header, the footer, on the front or last page, or even in the document properties. The desired method should be clearly detailed in the company guidelines.

Templates

Detailed information should be placed in the guidelines with regard to what templates are available for document production. There should also be instructions explaining how the templates are to be used, where they can be accessed, and appropriate information detailing what can and what can't be altered in the templates.

Company logos, colours and general branding

Most companies have an established logo, colour scheme and other form of branding. The guidelines should clearly indicate what these are, what the minimum and maximum sizing for logos is, the placement of logos, the colour of the text, and other branding issues.

Styles

The document guidelines should contain information about the size of font, line and paragraph spacing, and indents that are to be used for the body text (the general text), headings, table text, figure text, captions, and other text in the document.

Output

The document guidelines should include detailed information about how the document should be produced. For example, many computer printers will print in draft mode and quality mode. The guidelines should indicate when it is appropriate to print the document in quality mode (which is more expensive and sometimes slower). Also, it is increasingly popular to transmit documents electronically via email. The guidelines should indicate when documents are to be printed on paper and when they are to be transmitted electronically.

Review of standards

It is not possible to lock in standards forever – needs and technology are changing too fast to make this possible. Consideration should be given, therefore, as to how frequently the standards will be reviewed and how the amendments will be provided to the user.

MEETING ORGANISATIONAL REQUIREMENTS

Word processing programs such as Microsoft Word allow you to create a huge range of documents, from the personal letter to complex organisational reports. While most personal

documents are designed from personal taste, an organisation's documents should be produced according to the image that the organisation wants to convey to the public.

Organisational Logo

An organisation's logo is usually a special graphic image that is used to identify the organisation to the public. These images are stored digitally as image files, and can easily be imported into word processing programs such as Microsoft Word. Organisational logos are generally found on the first page of a letter (known as the letterhead), or they may be found at the top (header) or bottom (footer) of every page.

Organisational Colour Scheme

As well as an organisational logo, each organisation will further brand itself by having specific corporate colours that are used throughout their documents. Usually the corporate colours will be the same colours as those used in the logo. These colours may be used in business documents, brochures, flyers and other advertising material to further help identify the organisation to the public. Microsoft Word allows you to apply colour to text, for example, as well as to apply and customise **document themes**. Document themes contain colour schemes and you can customise these to match organisational requirements. As colour printing becomes less expensive, more documents are being printed with coloured elements, such as shapes and borders, which reflect the organisation's corporate colours.

Established Guidelines

Large organisations often have established guidelines in place for producing organisational documents. These guidelines will most likely be found in the company's **Style** guide or similar document. These guidelines are developed so that employees can produce consistent documents that convey the organisation's image.

Styles

In word processing programs you can create documents that have a consistent look and feel by using styles. A **style** is a stored set of formatting attributes that can easily be applied to text. Many organisations will have a range of styles that you are required to use when producing business documents and these may be contained in the organisation's templates (see below). Information about using styles will also be contained within the company's **Style** guide or similar document.

Templates

Templates are often used in organisations for most standard business documents and are made available to all users. Each template will already contain the prescribed layout and formatting as well as the organisation's styles. Many templates already contain standard or boilerplate text to reduce the time it takes the user to create a document. These templates will usually be available on the organisation's intranet or network.

Organisational Details

With organisational documents it is important to be able to locate them easily. Information such as the file name, file location, author, date, and/or time is often found in the footer (bottom) of the first page or each page of the document and this information will help to locate electronic copies of documents. Again, the established guidelines for the organisation will spell out requirements.

Copyright Legislation

It is important that document content adheres to copyright laws and requirements. Organisations that produce documents that fail to meet copyright guidelines are often the subject of law suits. Again, the established guidelines for the organisation or your supervisor should indicate what can be placed in a document and how it should be presented.

THE FOUR BASIC PRINCIPLES OF DESIGN

Robin Williams, in her excellent book on design, *The Non-Designer's Design Book*, has identified four basic principles to assist users in the design of effective and striking publications: **contrast**,

repetition, **alignment** and **proximity**. These interconnected principles should be applied to all documents that you create to ensure effective and professional-looking documents.

1 Contrast

Contrast is used to create interest on the page or in the document and occurs when two elements are different. Contrast demands that you take risks and be bold. If two elements are *sort of* different, then you have conflict rather than contrast. For contrast to be effective the elements must be very different.

For example, you can contrast large fonts with small fonts, old fonts with new fonts, a thin line with a thick line, a cool colour with a warm colour, wide spacing with narrow spacing, a small picture with a large picture, and much more.



2 Alignment

Aligning items on a page creates a strong visual connection and implies order and cohesion. The basic rule of alignment is that nothing should be placed on the page arbitrarily – every item on a page should have a visual connection to something else on the page. The purpose of alignment is to unify and to organise, and it is often alignment that determines the mood or look of a publication – formal, humorous, serious, and the like.



3 Repetition

In life, repetition is boring, but in document design, repetition is everything! The basic principle here is that you repeat some element or aspect of your design throughout the entire document or publication. This is done in a variety of ways. For example, you can make all of your main headings the same, create a consistent header or footer on each page, indent the body text in the same way throughout the publication, and more.

Use repetition to provide a theme and consistency throughout your publication – but avoid going overboard and allowing repetition to become annoying or overwhelming. In some ways repetition is the antithesis of contrast – yet good documents have both principles working together.

4 Proximity

Many designers tend to place design items too far apart – often items are placed at different corners of a page. Placing related items together creates a strong visual unit and helps the eye of the reader to find the information they're looking for. Grouping related items in close proximity to each other creates an impression of organisation.

To achieve proximity you should avoid placing too many differing and separate elements on a page and avoid placing items in the corners or the middle of the page. Equal amounts of white space should also be avoided.

Further reading: *The Non-Designer's Design Book* by Robin Williams (Peachpit Press, 1994)

UNDERSTANDING DOCUMENT LAYOUT

To understand how to **lay out a document** effectively, you need to understand how readers read information, as well as how to control the flow of text on a page. When reading a

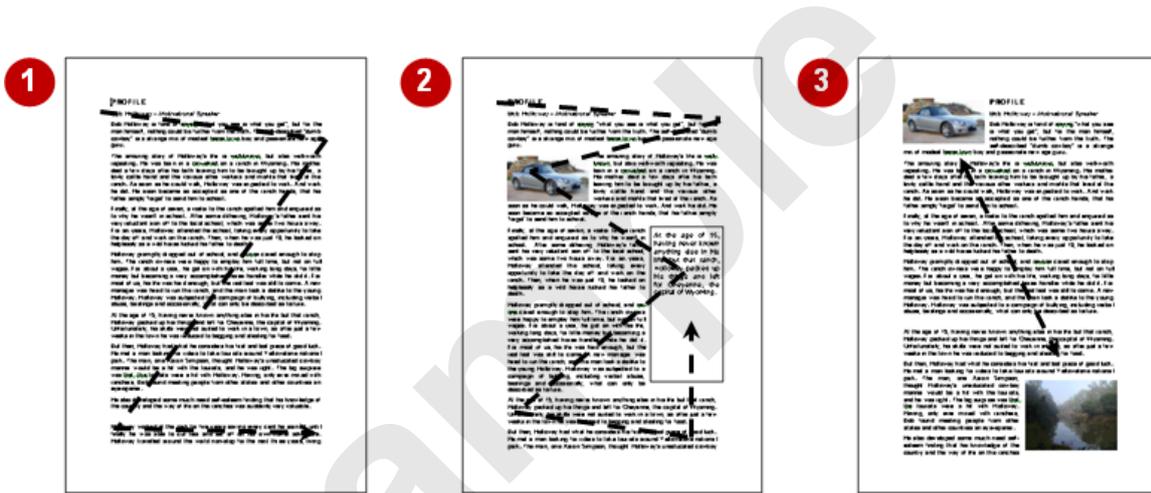
document, readers will scan a page in a specific way and text flow will determine the readability of a document. Similarly, alignment of text will dictate the warmth (or otherwise) of your documents.

Controlling Text Flow

When looking at a page, readers will generally scan the page across the top from left to right, then scan down to the bottom left and across to the bottom right. This is shown in illustration 1 below.

The scanning pattern of readers can be varied by including visual elements on the page, such as pictures, graphics, tables and the like. In illustration 2 below, two visual elements have been introduced to change the scanning pattern of the reader.

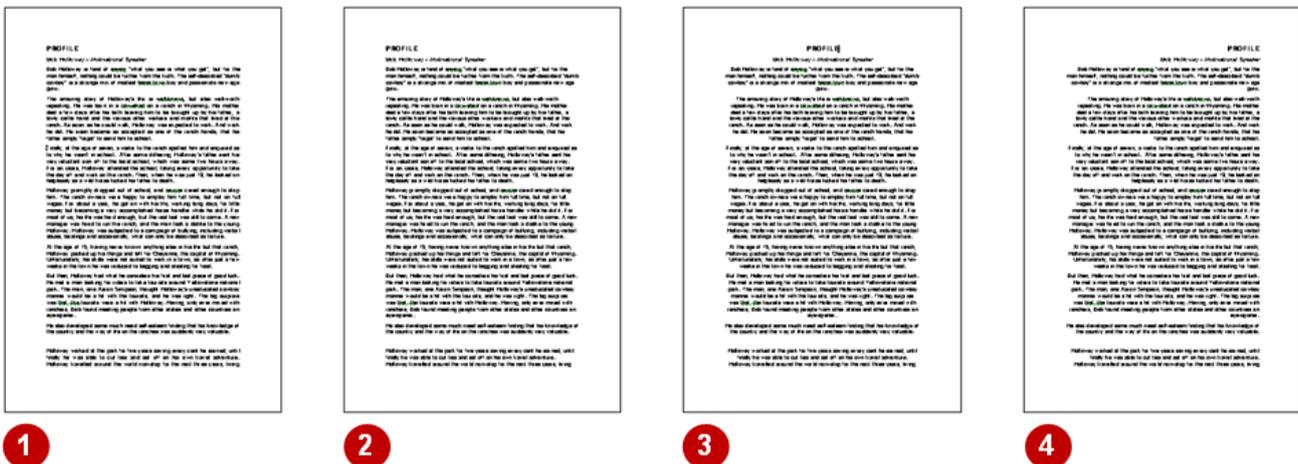
Placing strong visual elements at the top left and bottom right of the page, as shown in illustration 3, captures the reader's attention and often forces them to read the text in between. Their eyes are drawn back and forth between the visual elements forcing interest and curiosity.



Text Alignment

Text alignment can be used to set the tone of your document. Basically, you have four alignments to work with:

1. **Justified** – even alignment at left and right – is used to provide an official tone to your document
2. **Left** – with ragged right edge – sets a casual tone to your document
3. **Centred** – with left and right ragged edges – should only be used for one-page fliers and the like
4. **Right** – with ragged left edge – should only be used for specialised purposes as it is very difficult to read.



UNDERSTANDING WHITE SPACE

White space is a term used to describe the area on a page or in a document that is blank, that is, contains no text, picture, table, or other item. It is important to include areas of white space in a

document, as this improves the readability of your document, especially where there are long blocks of text. There are a number of ways of controlling the amount of white space in your document.

Page Margins

Every page of your document contains four margins – top, bottom, left and right. These margins can be individually set from the edge of the page. The greater the margin, the larger the area of white space you will have on the page. The left margin is often set at a higher value than the right margin in documents and this is handy as it enables the reader to make notes in the margin if required.

You can adjust the document's page margins by clicking on **Margins**  in the **Page Setup** group on the **Page Layout** tab.

Spacing Between Lines

Some documents, such as draft reports or essays, are often produced with text that is double-spaced. Double-spacing these documents makes them easier to review, especially where annotations or notes need to be written on the page. In Word you can set the spacing infinitesimally.

You can adjust the double-spacing of text by clicking on **Line spacing**  in the **Paragraph** group on the **Home** tab.

Spacing Between Paragraphs

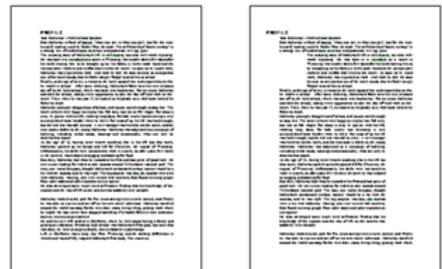
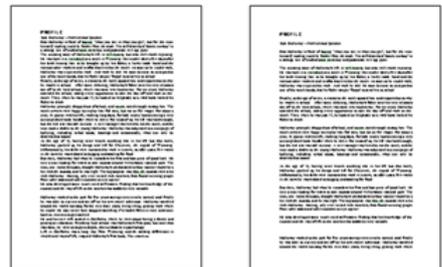
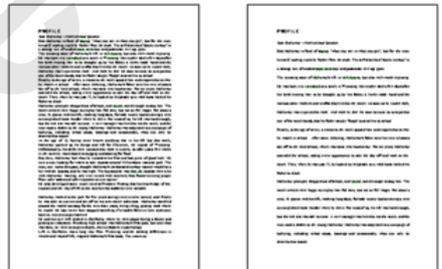
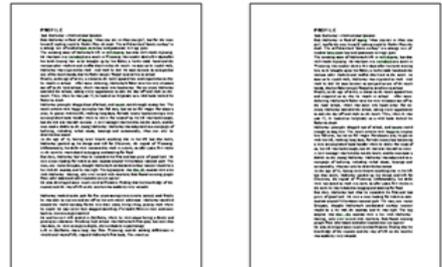
Large slabs of text can be easier to read by manipulating the spacing between paragraphs. You can normally set spacing before a paragraph and also after a paragraph. Spacing between paragraphs is usually measured in points – 72 points are equivalent to 1 inch (2.5 cm).

You can adjust the spacing between paragraphs by increasing or decreasing **Before** and **After Spacing** in the **Paragraph** group on the **Page Layout** tab.

Indenting

While page margins are measured from the page edge, indents are measured from the margin. Normally text appears between the left and the right margins. However, you can increase the spacing from the left or right margins by changing the paragraph indentation. Indentation can also be set to negative values so that they go back into the margins.

You can adjust the indentation of paragraphs by increasing or decreasing the **Left** and **Right Indent** in the **Paragraph** group on the **Page Layout** tab.



White Space – Pros and Cons

Pros

- Improves readability
- Allows reader to make notes and annotations
- Attracts interest

Cons

- Increases document size
- Higher printing costs due to page size

UNDERSTANDING TYPEFACE

In the past, printers used metal typefaces to determine the style of printing. In computers **typeface** refers to the type of font (the style of printing) and usually the size of the font used.

The typeface of your document often dictates the legibility of the document. Typeface can also reflect the tone of your document – formal, happy, sad, comic, and the like.

Fonts

Fonts refer to the style of print used. There are thousands of fonts available today. On your computer, fonts are installed in Windows and are made accessible to programs such as Microsoft Word. Factors to consider with your document are font category, font size, and font type.

You can view all available fonts and change the font used by clicking on the drop arrow for **Font**

Calibri (Body) in the **Font** group on the **Home** tab.

Font Categories

There are several categories of fonts:

Old style fonts	Old style fonts developed from handwriting and are characterised by serifs – tiny tails that help the letters flow into one another. These fonts are used in larger publications such as reports, essays and books.	Cambria Times New Roman Bookman Old Style
Sans Serif fonts	Designed to appear uncluttered, sans serif fonts don't have the tails that serif fonts do. Sans serif fonts tend to be slower to read. They are usually used for documents that do not need to be read from beginning to end – e.g. brochures and flyers.	Calibri Arial Century Gothic
Script fonts	Script fonts are designed to look like handwriting.	<i>Lucida Handwriting</i> Bradley Hand ITC
Display fonts	Display fonts are often used for display or decorative purposes, often in headings. They are excellent for posters or flyers.	Comic Sans MS Broadway CASTELLAR
Wingdings	Wingdings are a special font that contain pictures rather than letters or numbers. They are used to place symbols such as telephones, a computer mouse, arrows, squares, scrolls, pointing fingers, and the like in documents.	● ○ ■ □ ◻ ◻ ◻ ◆ ◆ ◆ ◆ ◆ ☒ ☒ ☒ ① ② ③

Font Size

The size of a font is measured in points (there are 72 points in an inch). In Microsoft Word 2010, the default font for a new blank document is Calibri and the size is 11 points.

The comfort factor with font sizes varies with age and reading skill. New readers, especially children, prefer larger sizes (around 15 points). Competent adult readers prefer sizes between 10 and 13 points, while older people prefer sizes between 13 and 14 points.

Font Style

Fonts also may have certain styles associated with them. The style may be normal (default), italic, bold, underline, or bold and italic. Bold and italics are used for emphasis. Italics are often used for short quotations (2 – 3 lines), unfamiliar foreign words, titles (books, songs, poems), and passing reference to inanimate objects (rockets, ships, planes, trains, cars).

UNDERSTANDING VISUAL ELEMENTS

Traditional documents, especially those created on typewriters, consist entirely of text. With word processing programs, however, it is possible to incorporate **visual elements** into your

documents, such as photographs, logos, drawings, graphics and charts. These help to break up text, facilitate technical explanations, and generally make your documents more visually appealing.

Visual elements are objects inserted into a document that are not text. They include graphics, photographs and drawings.

Graphics

Graphics is a widely used term and can virtually be applied to all visual elements. In Microsoft Word the term is mostly used to refer to graphs or charts from a spreadsheet application, or self-contained images such as logos, SmartArt or Clip art. Clip art are usually entire pictures (such as cartoons) or drawings and are stored as separate files in a library or gallery.

You can insert graphics by using the tools on the **Illustrations** group on the **Insert** tab. Once inserted, you can position and edit selected graphics by using the tools on the **Picture Tools: Format** tab.

Photographs

As the name suggests, these are photographs that have either been scanned into the computer or captured on a digital camera. Photographs are stored in files (usually JPG files).

You can insert photos by clicking on **Picture**  on the **Illustrations** group on the **Insert** tab.

Drawings

Drawings can be created with Microsoft Word using the **Shapes** tool  and consist of combinations of lines, squares, circles, and other shapes to form composite objects such as diagrams, flow charts, organisational charts, logos, and the like. Unlike the other visual elements, they are created within the document rather than inserted, pasted or imported from a file format.

You can insert and create shapes and drawings by clicking on **Shapes**  on the **Illustrations** group on the **Insert** tab.

When To Use Visual Elements

Visual elements can be used to:

- enhance or explain aspects introduced in the text
- add relief (usually comic)
- fill a large area that would otherwise be empty
- make the document more attractive to the reader
- reduce the amount of textual explanation required.

Where To Place Visual Elements

Visual elements can be placed anywhere on a page in a document. In Microsoft Word they can be placed on the page and in line with the text with the text wrapping around them, behind the text, or floating on the page.

Visual elements can be resized to look comfortable within the constraints of the overall layout of the page and document. However, be aware that reducing an element too much may render it illegible and useless.

Some publications have visual elements in consistent positions, either at the top or bottom of the page. If this is the case it is usually expected that the element will include a caption. In Microsoft Word you can use captioning to apply automatic caption and figure numbers.

Visual elements can provide balance to your document page.