INFOCUS

DOCUMENT DESIGN AND LAYOUT

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 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 principles of design

✓ gain an understanding of how to create perfect page layouts

✓ gain an understanding of how to create a readable document

✓ gain an understanding of visual elements in a document

✓ 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 make business decisions and help 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	Spreadsheets Database Word processing Specialised production software	Low	For internal communication only
Sales reports	Spreadsheets Database Word processing Accounting software	Low	For internal communication only
Meeting minutes	Word processing	Low	For internal communication only
Price lists	Spreadsheets Database Word processing Accounting software Desktop publishing software	Medium	For internal use as well as external communication to customers
Order forms	Word processing Desktop publishing software	Low	For customer use
Product brochures	Word processing Desktop publishing software	High	For customer use
Merge letters	Spreadsheets Database Word processing Accounting software	Medium	Used to communicate to customers
Job descriptions	Word processing	Medium	For prospective job applicants
Employment forms	Word processing Desktop publishing software	Low	For internal use only
Job procedures	Word processing	Low	For internal use only
Supplier price lists	Spreadsheets Database Word processing Accounting software	Low	For internal use only
Product specifications	Database Word processing Accounting software	Medium	For customer use
Memos, faxes, letters	Word processing	Low	For internal and external communication
Accounting reports	Spreadsheets Database Word processing Accounting software	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 PILLARS OF GREAT DESIGN

There are four basic design principles you can use to assist in the construction of visually effective and striking publications. They are *contrast*, *repetition*, *alignment* and *proximity*.

These principles are interconnected and should be applied to all documents you create in order to achieve brilliant looking documents!

Contrast

Contrast is used to create interest on the page or in a document and occurs when two elements are different. For instance the contrast between the size and style of the first word in this paragraph, '*Contrast* ' and the remaining text. Creating contrast demands taking risks and being bold, so don't be afraid to try something new when it comes to designing your documents!

For contrast to work, you must have two elements that are *very* different. If the two elements are only *slightly* different this may create *conflict* in your document, which is not something you wish to do! Also try to stick with just one or two contrasting elements. If all the elements on a page contrast with each other this could also create *conflict*.

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.

Proximity

Often people place design items too far apart – resulting in items being placed at different corners of a page. Placing related items together creates a strong visual unit and helps the eye of the reader find the information they are 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 middle of a page. Equal amounts of white space should also be avoided.

Proximity

In the above example you can see proximity is achieved by placing the two images and the corresponding heading close together

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 randomly – every item on a page should be placed in its particular location for a reason and every item should have a visual connection with the rest of the items on a page. For instance the two images below are aligned top so they are both placed at the same level on the page. The left image is aligned left with the text so that it creates a nice neat edge and the same has been done with the image on the right.

The purpose of alignment is to unify and to organise, and it is often alignment that determines the mood or look of the publication.

Consistency

In life, repetition (or consistency) can be 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 provides a sense of *consistency* and *cohesion*. Consistency can be achieved in a number of ways. You can make all your main headings the same, create a consistent header or footer on each page, indent all body text in the same way and more.

Use consistency to provide a theme throughout your publication – but avoid going overboard and creating a repetitive document that's annoying or boring. This is where *contrast* comes in handy as it can provide a break from all that repetition!

In the example below you can see consistency is achieved through the use of the same border.

PERFECT PAGE LAYOUTS

To understand how to organise and arrange the elements of a document effectively, you need to control the flow of text on a page as this affects how readers absorb information. Readers tend to scan a page in a specific way and text flow will determine the readability of the document.

Controlling Text Flow

When looking at a page, readers will generally scan the page across 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 manipulated 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 readers' attention and often forces them to read the text in between. Their eyes are drawn back and forth between the visual elements promoting interest and curiosity.
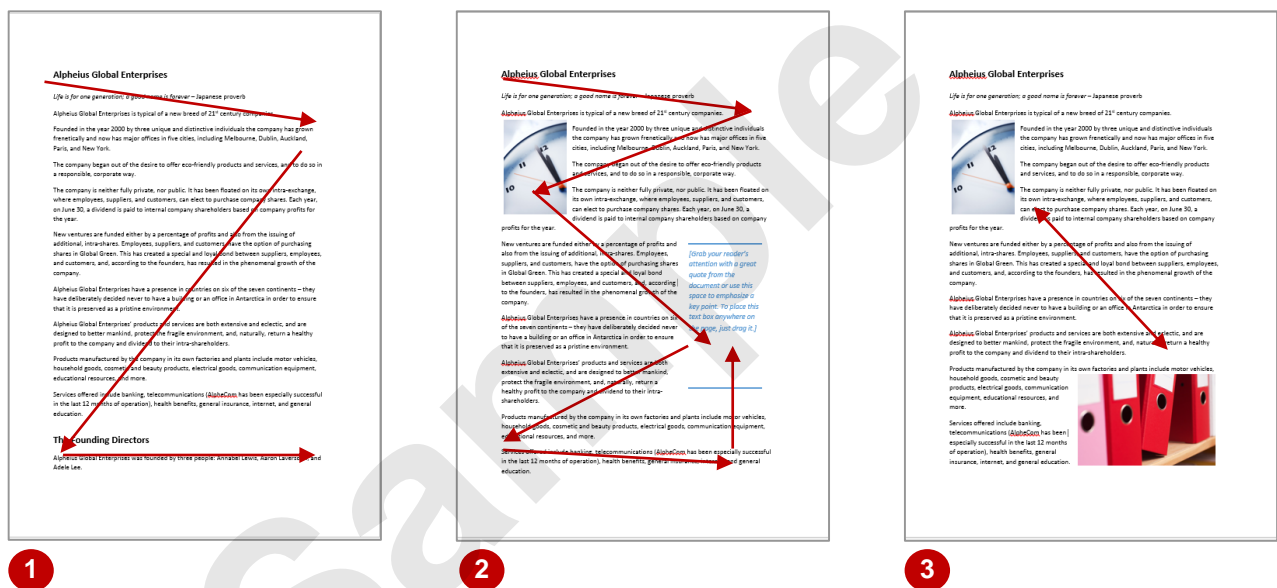
White Space

White space is simply the empty or blank spaces on a page and includes areas such as margins, space around graphics and more. The use of white space is important in creating a visual separation between elements in your document. For instance, there should be white space between your paragraphs to signal to the reader that each paragraph (block of text) contains separate information or a different thought or idea.

Colour

Readers are naturally attracted to bright and high contrast colours so where there is colour on a page, our eyes will automatically be drawn there first. This is why its often useful to create coloured headings as it draws readers attention to the most important parts of the document. However colour can either make or break a document so here are a few things to consider when using colour.

Symbolism – Whether you are conscious of it or not, colour does represent certain things in our society. For instance, green is often seen as representative of the environment so in a document discussing the merits of sustainability green may be more appropriate than, say hot pink.

Mood – Think about what you are trying to say with your use of colour. If you are creating a business report for the company your document needs to reflect a certain seriousness. Therefore, a colour scheme of bright yellow and purple, while it may create an uplifting, fun feel to the document, does not create a mood of professionalism.

MAKE IT READABLE

The readability of a document refers to how easy the document is to read and comprehend. There may be various things that reduce the readability of a document such as the size and style of text, or the presence of too many colours and visual elements which detract from the purpose of the document. Listed below are a few key points to remember when designing a readable document.

Text Alignment

Text alignment was covered earlier in this book and you were shown how to apply each of the four alignment styles, *left*, *centre*, *right* and *justified* alignment. But are all these alignment styles equally easy to read? Because we read left to right, *right-aligned* text (with a ragged left margin) can be very difficult to read. *Centre* alignment can be similarly difficult and *justified* text is stretched to fill the spaces so it is flush on either side and this can also make it hard to read. Therefore, it is generally agreed upon that *left-aligned* text such as the text you are reading now, is the easiest to read and understand.

Not only does the alignment of your text change the readability of your document, it also changes the whole look and tone of your document so it is definitely something you need to consider.

Font

Using too many different **font** STYLES can make the page look 'busy' and the reader can become distracted making the content of the document unclear. As a general rule, try not to use more than two font styles in the same document (this doesn't include using **bold** and *italic*). Also limit the use of upper case to short headings as upper case is harder to read than lower case. Be wary of making your font too small as this makes it very difficult to read. In most professional documents 12pt is considered an appropriate size. Also be careful with the font styles you choose as some styles can be very difficult to read.

Headings

Headings are essential to improving readability and organising your document into easy to understand sections. Headings can be used to highlight information or a change in content. You can create a hierarchy of headings for different kinds of information. For instance you could have main headings which indicate a general topic and then you could include subheadings (which are generally smaller headings) to indicate more specific information.

As readers tend to scan a document first, the use of headings is very important as people automatically read them first. Headings need to tell the reader what the text below the heading will contain. To achieve this, headings need to stand out from the text around them and be short and to the point.

Ensure headings are slightly closer to the text beneath them than the text above. This clearly shows which content is related to the heading. Placing elements close together is part of creating *proximity* which is one of the four pillars of design and was discussed earlier in the chapter.

Lists

Numbered or bulleted lists are a great way of organising information and can really help maximise the clarity of your content. Use numbered lists to represent ordered steps such as the stages of a process. Use bulleted lists for unordered steps (when the order of items is not important) such as a shopping list.

Paragraph and Sentence Length

If your paragraphs are too long readers may become bored. Break up text with white space or other elements. Similarly, don't make your sentences too long or by the time your reader has reached the end of the sentence they will have forgotten what the point was to begin with. Sentence lengths should be varied to create a flow and to keep your text varied and interesting.

Margins

Your margins should be an appropriate size. If they are too small, the text will dominate the page making it very difficult to read. If the margins are too large, the white space will dominate the page resulting in a lack of balance between white space and text.

PICTURES TELL A STORY

Traditional documents used to consist entirely of text. With word processing applications, however, you can now incorporate a large number of visual elements such as photographs, logos, drawings, graphics, charts, and the like. These help to break up text, facilitate technical explanations, and generally make your documents more appealing.

Visual Elements

Visual elements include the following:

- *Graphics* – This is a widely used term and can virtually be applied to all visual elements. In Word, the term is mostly used to refer to graphs or charts from a spreadsheet application and self-contained images such as logos, SmartArt or clipart.

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

- *Drawings* – Drawings are visual elements created within Microsoft Word itself using the Drawing facility. Drawings are created by combing lines, squares, circles and other shapes to form objects such as diagrams, flow charts, organisational charts, logos and the like. Unlike other visual elements, they are created within the document rather than inserted, pasted or imported from a file format.

When To Use Visual Elements

Visual elements can be used to:

- enhance or explain concepts introduced in the text
- add relief (usually comic)
- make the document more visually appealing
- reduce the amount of textual explanations required.

Where To Place Visual Elements

Visual elements can be placed anywhere on a page in a document. In 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.

Tips For Using Visual Elements

Use images and other graphical items with moderation and ensure they are relevant to your text and are included for a reason other than to fill up space on a page (like ours above!). There are a few key points to consider when using images such as drawings, clip art or photos in your document:

Reduce and Resize – instead of inserting lots of small images use one or two larger images which accurately express your point. A page can become cluttered if you have lots of clip art, photos and other graphics scattered all over the page.

Unify – Provide consistency by making your images the same size or by applying the same border to all. Align them with each other and with the other elements on the page. Just like when you are writing and you want your document to flow from one concept to the other in a logical fashion, you also want your images to have the same flow and relevance to each other and the other elements.

Prioritise – If one image is more important or relevant than another, emphasise it through size and placement.

Remember: Make sure each image is necessary to the overall goal of the document. Try not to use more than three images on a single page. And as with all elements, consider the purpose of your document and whether the image, or the use of images in general, is appropriate to that specific document.

THE TIPS AND TRAPS OF WRITING

Producing documents of any length that are to be presented to other people requires attention to detail. **Consistency** is the key – whatever rules and conventions you use, ensure they are applied throughout the document. Below is a list of some of the more troublesome aspects of document writing you should consider when using Word.

a.m. and p.m.	These are normally written as a.m. and p.m. rather than am and pm.
Ampersand (&)	Only use the ampersand (the *and* symbol **&**) in company names. Do not use the ampersand to replace the word *and* in your text or headings.
Dates	The current convention is to use ordinal numbers (e.g. 15 September) rather than cardinal numbers (e.g. 15th September). When writing year ranges use the full year, an en-dash, and the decade and year (e.g. 1952 – 89), except when spanning centuries (e.g. 1995 – 2008). Use a slash for financial years (e.g. 2007/08).
Commas	Commas can be used for many reasons but the two main instances where you use a comma is in a list (e.g. apples, oranges, pears and bananas) or to separate two different ideas (e.g. Let us make the most of today, for tomorrow may never come.)
Numbers in Text	Numbers from one to nine are usually written out in full, while 10 and onwards are inserted as numerals except if they occur at the start of a sentence (e.g. Twenty-nine people arrived today). Numbers in a range (e.g. 8 – 10) are hyphenated when written. Treat decimals and ratios as large numbers.
Quotation Marks	Use 'single quotation marks' for quotations longer than three lines and for direct speech. Use "double quotation marks" when you need to show quotations within quotations.
Showing Emphasis	Emphasis is achieved by using **bold**, *italics* or a combination of **both**. Use *italics* for short quotations (i.e. up to three lines), and passing reference to inanimate objects such as names of ships and planes. **Don't** use underline because it makes the text harder to read as the underline passes through the descenders of letters with tails, such as lowercase g and y (e.g. 'groggy').
Apostrophes	Apostrophes indicate possession – they do **not** make a word plural. Here are some examples of when you use an apostrophe.
	Sally's coat is green.
	The boys' parcel arrived.
	That man's jacket is yellow.
	The women's team has remained undefeated.
	Tess' jumper is blue.
	It's a fast yacht which you can see by the size of **its** sails. (Special note: **it's** is a contraction of **it is** whereas **its** shows possession of an inanimate object such as this yacht.)
Misuse of words	It is very easy to accidentally use a homonym (a word that sounds the same but has a different meaning) of the word you intended to use. Here are a few to watch out for:
	Their (That is *their* house.) and **there** (They live over *there.*) and **they're** (*They're* our new neighbours.)
	Who's (*Who's* taken my cat?) and **whose** (*Whose* cat is this?)
	Your (That is *your* cat.) and **you're** (*You're* a cat!)
	Than (My apple is better *than* yours.) and **then** (I ate an apple, *then* I walked out of the room.)
	We're (*We're* great friends.) and **where** (*Where* are your friends?)
Run-on-sentences	This is an example of a run-on-sentence and as such contains too many commas, words and separate ideas which makes this sentence very confusing for you as the reader, because by the time you reach the end of the sentence you will have forgotten what the point of this sentence was to begin with!
Shift in tense	Make sure the tense you use (past or present) is appropriate and consistent. For instance, write 'It *was* (past tense) a hot night and I *felt* (past tense) like going swimming' rather than 'It *was* (past tense) a hot night and I *feel* (present tense) like going swimming'.