
Monotype

Designing **Business Documents**

Adapted by Chris Burke from
the *Monotype Desktop Solutions* series
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Section 1 Introduction

1.1 The purpose of typography

Typography is designing with type in order to communicate a message. Desktop publishing (DTP) offers you the facilities to use type in many sizes and styles to achieve a professional look. You might easily be tempted to ‘jazz-up’ your documents with all the special effects you can muster – if you do this, you may end up having more fun than your readers. Restraint is essential, so that the content of documents is clearly understood. Typography should not call attention to itself – its purpose is to make work easier for the reader.

When designing, you should put yourself in the reader’s place. Try to think through everything you do from the reader’s point of view. You cannot force anyone to read anything, but you can make a document clear, accessible, and adaptable, to help readers navigate their way around the text for any purpose. There are certain principles of legibility and perception which should be followed to help achieve this (see *Section 4 Principles of legibility*).

Readers will have preconceptions about the size and general layout of a company report, or even an official letter, based on their past experience with that kind of document. Before reading at a ‘word’ level, they may have started reading on a global level, flicking through and picking up structural

1.1 Readers begin to identify a document by its physical appearance: format, size, apparent complexity. They will already have recognized different kinds of information before they begin to read the text.

THE LEADER WOMAN OF THE WORLD
Wednesday 12 July 1992 Manchester and London 31p

SAILORS IN SCURVY SCARE
Shiver me timbers and hoist the mainsail! First recorded case in 196 years

OOH! WHAT A PICTURE
There are certain principles of typography which should be followed to help achieve this.

When designing your message
When designing your message, you should put yourself in the reader's place. Try to think through everything you do from the reader's point of view. You cannot force anyone to read anything, but you can make a document clear, accessible, and adaptable, to help readers navigate their way around the text for any purpose.

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The pros and cons of doing it yourself?
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cues and features. Apart from novels, users rarely read documents from beginning to end: they have their own purposes and tasks, which the document must accommodate.

Readers will quickly pick up the ‘norm’ in a document. In reports and proposals, this is likely to be continuous text. Therefore any graphic feature that is different from this norm will be taken as significant, giving the designer the opportunity to emphasize elements and attract attention, with headings of different sizes and styles, or charts and tables. Even in correspondence, like letters, memos, and faxes, where there cannot be much deviation from the norm, simple graphic features can mark out different kinds of information.

The rest of this booklet gives some guidance on the design of reports and correspondence. Even if you are only concerned with the design of company reports, you may find some points of interest in the sections on letters, memos, and faxes – and vice versa.

For more information on designing and producing your documents see the Monotype Desktop Solutions series:

Designing Reports and Presentations, Designing Forms and Catalogues, and Designing Newsletters and Booklets, Salfords and Chicago, Monotype Typography, 1991.

Section 2 Planning and checking

2.1 Budget

If you are producing a report, the budget can affect the length of the document, how many are produced, and the way it is produced. Will you produce multiple copies by photocopying pages output on your laser printer, or have them professionally printed from the high-resolution output of a typesetting machine? (see *Section 14 Technology and type*). Budget will also affect how the report is bound.

If you cannot afford pre-printed headed notepaper for letters, you may want to set up a template design on screen, with a letterhead that works in black and white, and is printed with each letter (see *Section 11.1 Stationery*).

2.1 Choosing a binding method will depend on the kind of document you are producing (what it will be used for, its length) and your budget. Some alternatives to office stapling or ring binding are plastic comb binding, wire spiral binding (more expensive but more durable than plastic), saddle stitching (used for this booklet), or perfect binding. Saddle stitching should only be used for documents of up to 64 pages, and you need at least 32 pages for perfect binding.

Double-check with your binders that you have allowed a wide enough back margin for the binding method you have chosen.



plastic comb binding perfect binding wire spiral binding

2.2 Schedule

A production schedule should be worked backwards from the deadline for delivery, taking into account the schedules of other people involved, such as suppliers and printers. Make certain you allow for several stages of proofing, and remember to keep frequent back-up copies of your work.

2.3 Designing within your capabilities

The design of a text must cater for the content: if there are three levels of heading, the design must cater for them; if there are likely to be illustrations and captions, they must be catered for; and so on.

However, the design must be geared to what you can do with your software – it's no good planning a multi-column document if you don't have the soft-

ware to produce one (see *Section 2.4 Matching software to document preparation tasks*). And at the other extreme, you should avoid the temptation to design documents that show off the different facilities of your software, such as text running around illustrations, just because you have them – they may not be appropriate to your document.

2.4 Matching software to document preparation tasks

There are three different classes of desktop publishing software: word-processing, drawing, and page make-up software.

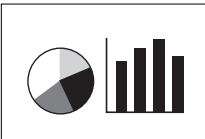
You will probably use word-processing software for correspondence, and page make-up software for the more complex layout of a report: before page make-up, you should still use word-processing software to finalize the text, so that you are not distracted by problems of page layout when trying to concentrate on writing.

Your choice of software may depend on the nature of your document. If your report is simple, you may



Word-processing software mainly for originating text.

Should provide tools that help you work with text (such as routines to search the whole text for particular words or letter combinations and spelling checkers that allow you to create your own dictionaries of acceptable spellings).



Drawing software for originating drawings, charts, and diagrams; can be good for tables.

Should include a wide range of tools for drawing different kinds of shapes, lines, and curves, and for moving them about on the page, either singly or as groups.



Page make-up software for assembling the different elements of documents (text and illustrations) into pages.

Should take text and illustrations from word-processing and drawing software into different fields on the page (such as main and subsidiary columns); should allow fine adjustments to the typography of the text and the sizing and positioning of illustrations.

only need a word processor. If you are preparing a poster or chart that combines pictures with small amounts of text, it may make sense to type your text directly into page make-up software. A complex table may be best treated like a drawing, and produced with drawing software, which allows you to move the different elements relatively easily.

If you are combining software, check carefully for compatibility: make sure your page make-up software will take in text and illustrations from your word-processing and drawing software.

2.5 Testing out your design work

Remember you are producing paper documents, so be sure to test out your design work on paper, rather than just looking at it on your computer screen, where its appearance will be very different.

The appearance of documents will alter considerably with changes in resolution. For example, type and rules have sharper definition at higher resolution, and the contrast between bold and plain text is more distinct (see *Section 14 Technology and type*). So if your document is to be typeset, rather than laser-printed, ask your typesetters to produce a sample page, so you can see how it looks at high resolution.

Remember, too, that your readers will be using documents they can hold, with pages they can flick through, rather than the flat pages you produce, or look at on screen. So make up sample documents that match the look and feel of final copies. These should help you check things such as whether there is a wide enough back margin for binding (see *Section 6.2 Margins*), whether page numbers and running heads will be clearly visible, and so on.

Whenever you can, try to get people who might use your document to comment on its design, as well as making judgements yourself.

2.6 Checking

You should check the text of your document as often as possible. If you have been working on a text for some time, it is a good idea to have someone else proofread it, as you can easily overlook errors in a text you are accustomed to.

When you have finalized the page-layout of a report, print out all the pages and stick them together so that they resemble the finished document. The

Year	Men	Women
1970	103	78
1980	119	85
1990	98	99

Type and rules output at 300 dpi.

Year	Men	Women
1970	103	78
1980	119	85
1990	98	99

Type and rules output at 2540 lpi.

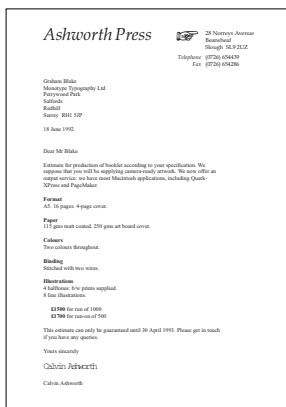
2.2 The relative weights of bold and light type, and the apparent thickness of rules, depends on the resolution of your output. (Rule is the printer's term for a line, to avoid confusion when referring to a line of type).

following list should jog your memory for things to check:

- Is the text correct? Is spelling, punctuation, and use of the 'house-style' consistent? (See *Section 5.2 Aspects of typographic style*). Don't forget to check headings, captions, footnotes, text in illustrations, running heads, contents lists, and indexes, as well as the main text.
- Have the correct headings been given for the text? And the correct running heads? Do the headings in the text match the headings given in the contents list? And are the page numbers in the contents list correct? Is the numbering system for parts, chapters, sections, and subsections consistent?
- Is the content of the illustrations correct? Are they the right size, the right way around, has the correct part of the illustration been used? Do the illustrations match the captions? Is the numbering of illustrations correct?
- Are the cross-references within the text and between text and illustrations correct?
- Are the page numbers in the index correct?

Section 3 Content and structure

Consider what your readers need from a particular document. Often they will want to find out quickly what it's about, and then read the text, or sections of it, in detail. They will perform these reading tasks by using the document's access structure.



3.1 Letters are better with sub-headings. Some correspondence is traditionally organized into headed sections, like the estimate shown here.

3.1 Access structure

This refers to the contents list, headings, and other things that help people to find out what a document is about or who it is from. Even official correspondence will benefit from subheadings, simply to divide it into manageable chunks. In longer documents, try to relate all the elements of the access structure to one another – so they make sense to someone flicking through the report. Notice how the contents list and headings have been designed to help you access information in this booklet.

3.2 Numbering systems

All documents that are more than a couple of pages long should have page numbers, and a contents list linking page numbers to sections of the text. Long letters, memos, or faxes will also need page numbers.

In reports, you may also need numbering systems for sections and subsections within the text, illustrations, and footnotes. Try to keep the systems distinct from one another: for example, if you are using numbers for headings, consider using letters for illustrations (though not if you have more than 26 illustrations). Avoid roman numerals (xxiii, xxiv, xxv), especially for long series, as many people find them difficult to understand.

Numbered sections will also provide quick access when you are discussing the report with somebody, who may ask you to look at a specific section.

Remember that the page numbers you use while originating your text and illustrations may not be the same as the final page numbers in your assembled document. If you make cross-references to page numbers, it may be best to give them a temporary place-marker (such as '00'), filling in the real page number when the document has been assembled

after page make-up. When you think you have filled them all in, run a search for the marker: it's easy to miss one or two.

3.3 Using styles and tags to format text

You can save a huge amount of time when you come to format text if you use the style facilities in word processors and page make-up programs. These allow you to store all the style attributes (such as typeface name, type size, space between lines, line length, indents, and tabs) for individual elements of text (headings, main text, footnotes) under a short name, called a tag. Then you can apply the styles quickly and consistently to appropriate parts of the text by calling up the relevant style names. If you need to change some attribute of a style then you can do so after you have created it, and all the parts of the text tagged with that style name will automatically be altered to fit the new style.

You can tag text with style names as you write, without thinking about what the styles are. Then, as you assemble the document, you can give the style names the attributes planned when the document was designed, and the text will take on its intended appearance. You can copy styles between documents produced with the same software, and so maintain consistent formatting across a series of documents. In most page make-up programs you can take in styles, along with text and illustrations, from word-processing and drawing programs. So once text has been tagged it can keep its tag throughout production, unless you decide to change it.

Main heading	
style	font = Rockwell Extra Bold size = 10 point; leading = 12 point
tag	A-heading
First subheading	
style	font = Arial Black size = 7 point; leading = 14 point 4 point space before
tag	B-heading

3.2 Styles and tags.

Section 4 Principles of legibility

SHAPE

Shape

4.1 Because they have ascenders and descenders (on h and p in this example), words in small letters have a more distinctive shape than those in capitals. We read by recognizing word shapes, rather than letter by letter, so text mainly in small letters will be more legible.

4.1 Typeface

Typefaces can be divided into seriffed and sans serif. Serifs are the small strokes at the end of main strokes of characters, which give a horizontal emphasis to a line of type. Seriffed typefaces are therefore best for large amounts of continuous text. Sans serif typefaces have characters which tend to look similar to each other and are best reserved for headings, captions, and short pieces of text.

sans serif	kid Arial	Sans serif typefaces give an impression of clarity, and are often used for technical texts. But they are best reserved for headings or short passages of text.
bracketed serif	kid 1 Times New Roman	Most common seriffed typefaces have bracketed serifs.
hairline serif	kid ■ Monotype Bodoni Bold Condensed	Hairline serifs are distinctive, but reproduce poorly at medium resolution.
slab serif	kid ■ Rockwell	Slab serifs are robust and give the typeface a sturdy impression.

4.2 Sans serif and seriffed typefaces.

4.2 Type size, line length, and leading

These three factors are interrelated. If you increase the type size, for example, you might also have to increase the space between lines to maintain legibility. The rules of thumb are these: space between letters should be less than word space, and word space less than the space between lines.

4.3 To maintain horizontal cohesion and so reduce disruptions to the flow of reading, the space between letters should be less than word space, and word space less than the space between lines.

top letters, words, and lines are poorly spaced

bottom letter, word, and line space are balanced.

Opinions will differ as to the real importance of withdrawal for the other products listed, because it is in the nature of markets for highly perishable goods for unsaleable gluts to emerge from time

Opinions will differ as to the real importance of withdrawal for the other products listed, because it is in the nature of markets for highly perishable goods for unsaleable gluts to emerge from time to time, and it is not

In text designed for continuous reading, lines should be between 50 and 70 characters in length (including letters, numerals, spaces, and punctuation). If there are fewer than that, there may be too many awkward linebreaks; if there are more, it can get difficult for the reader to find the beginning of the next line.

For the main text of a report, a type size of 10 or 11 point is a good starting size. Try 12 or 13 point 'leading' (inter-line spacing) – but if your lines are more than 70 characters long, more leading might be needed. If you are using two columns, your type size can be smaller, to correspond to the shorter line length. You can therefore reduce the leading.

Do not be tempted to use a very large type size for continuous text to fill out long lines with the 50–70 characters – you don't have to make your lines fill the page width. Research shows that type sizes between 9 and 11 point are most comfortable for sustained reading. However, don't rely on these figures – different typefaces may vary in visible appearing size at the same 'point' size.

You should make trials with samples of your text, tuning the type size, line length, and leading so that the text is comfortable to read, in the circumstances in which it is likely to be read.



4.4 Typefaces have different proportions; some may have large x-heights and therefore relatively short ascenders, as in the above example, which shows Times New Roman.

desktop	desktop	desktop	desktop
Arial	Times New Roman	Century Gothic	Monotype Baskerville

4.5 The nominal type size ('point' size) is therefore not always a reliable guide to appearing size. The example above shows four typefaces at 10 point.

For further guidance on legibility:

Herbert Spencer, *The visible word*, 2nd edition, London, Lund Humphries, 1969.

James Hartley, *Designing instructional text*, 2nd edition, London, Kogan Page, 1985.

For further guidance on how to use typefaces:

Alison Black, *Typefaces for desktop publishing: a user guide*, London, Architecture Design and Technology Press, 1990

Paul Luna, *Understanding type for desktop publishing*, London, Blueprint, 1992.

4.3 Text alignment and hyphenation

There are two main alignments to choose from for text: justified and ranged left.

Justified text

Justified text has straight left-hand and right-hand edges. Because readers may be familiar with seeing justified text in books (and newspapers), the assumption is that this gives a formal appearance to text. It does not improve legibility, however, and it is difficult to achieve a satisfactory result: for justified text to look good, words at line endings may have to be hyphenated and the spaces between words controlled.

If you accept the default ‘hyphenation and justification’ (h & j) settings in many page make-up programs, few or no hyphenation breaks are made, and the system will often spread out the words on a line to fill a column, by varying the width of word spaces and even by putting extra space between letters, which ruins the evenness of the text. You should do some trials to achieve good-looking text, allowing hyphenation, and controlling the minimum and maximum word spaces. If possible, specify zero letter-spacing. You should aim for an even appearance to each line of text.

Do not use justified setting for your letters, memos, and faxes. Whatever the style of your letterhead, it is not worth making the text justified, as the brevity of correspondence, often made up of short paragraphs, does not sufficiently define a straight right-hand edge. More importantly, some word-processing programs do not allow you to alter the default settings for word spaces and hyphenation, which may result in justified text with an uneven appearance.

4.6 The justified version (**below left**) may seem superficially neat, but the word spacing is conspicuously uneven from line to line, which disrupts horizontal reading. Because there is no word-division by hyphenation at the ends of lines, space has even been added between the letters in some lines to achieve justification. This destroys the coherence of word shapes.

The justified version (**below right**) allows hyphenation and has word-space settings of: minimum 60%; optimum 85%; maximum 150%. The overall effect is of an evenly-balanced texture.

(This illustration was created using QuarkXPress).

It might also be protested that, as far as British growers are concerned, withdrawal is of minimum importance. While it is true that relatively little is withdrawn in the UK, the market inter-linkages within the European Community, particularly after 1992, must not be forgotten. In a Single European Market a domino effect prevails, and withdrawal mechanisms help support British market prices as well as market prices in the countries in which withdrawal actually takes place.

The UK does not have to produce peaches for its horticultural producers to benefit from the EEC withdrawal mechanisms for peaches, for in the absence of such heavy withdrawals as have occurred in the past it is conceivable that larger quantities of lower-priced peaches could appear in British shops, eroding the market for other fresh produce in season at the time.

In 1989, a Committee of the European Parliament challenged the view that withdrawal supported market prices to the detriment of consumer interests. In particular it said: ‘Given that they are a form of price and income support, there might be a temptation to view the arrangements for withdrawal of fruit and vegetables as being against

consumer interests. Indeed, this is the argument put forward by nearly all consumer associations: that consumer prices of fruit and vegetables would be very much lower if there was no intervention. Yet what they do not say is that stable retail prices cannot be achieved unless the provision of fruit and vegetables is adequate. Provision, however, will not be adequate unless producers have a continuing incentive to produce and maintain high supply levels. On the other hand, without intervention arrangements many producers would often be left without profits or income, with the long-term risk that the incentive to produce would wane and supply levels fall, thus leading to increased consumer prices.

Doing away with the intervention facilities would consequently lead to lower prices only in the short run, while in the long run consumer prices would rise owing to falling production and supply levels. Furthermore, the proportion of consumer income accounted for by food has fallen continually ever since the common market has been in existence. Moreover, it has been shown time and again that consumer prices are almost invariably or to a large

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Doing away with the intervention facilities would consequently lead to lower prices only in the short run, while in the long run consumer prices would rise owing to falling production and supply levels. Furthermore, the proportion of consumer income accounted for by food has fallen continually ever since the common market has been in existence. Moreover, it has been shown time and again that consumer prices are almost invariably or to a large extent inelastic to changing producer prices. Consequently, a fall in producer prices is hardly ever matched by a corresponding fall in consumer prices. Instead, the difference is swallowed up by transport costs, marketing margins,

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4.7 The ranged left version **above left** has no hyphenation, which results in a very ragged right-hand edge. The ranged left version **above right** allows hyphenation, and the word space has been changed from the default value to 85%. The result is more even line endings and greater definition of lines as coherent, graphic units.

Ranged left text

Ranged left (or 'flush left') text has a ragged right-hand edge. This is a safer option than justified text and legibility is not impaired: it may even be improved, since word spaces are kept constant. In page make-up programs, if you have the hyphenation option switched off, very ragged line endings may result, so you may want to accept some hyphenation.

Space between lines should appear greater than word space (Figure 4.3): this preserves horizontal cohesion and assists the 'flow' of reading. In all DTP programs, the default word space is usually large, but in page make-up programs you can reduce the word space throughout. Word-processing programs do not allow you to change these settings, so you may try to compensate for this by increasing the leading: for 10 point type try 14, 15, and 16 point leading.

Ranged right and centred text

Your DTP program also offers you these other choices for text alignment. They are both fine for short items such as titles but they make longer passages of text difficult to read. Ranged right is useful for captions to tables or graphs, and for side-headings appearing in the left-hand margin.

4.8 Ranged-right setting (**below left**) is unsuitable for most text but may be useful in some tables.

Centred text (**below right**) may be appropriate for headings or a few lines of text, but not for long passages.

	1990	1991	1992
Standard lamps	8769	9671	10567
Accessories	5689	6754	7856
Deluxe lamps	690	540	590

Marketing opportunities for the coming decade

How we can be market leaders within three years, with a reputation for innovative products at competitive prices.

4.4 Paragraphs

There are two common ways of indicating the start of a new paragraph: by indenting the first line or inserting extra space above the first line. If you insert extra space, it should be at least half of your normal line space: so with 10 point leading, add an extra 5 points between paragraphs (making 15 points in all). If you use this method, be aware that a paragraph end may not be clear at the bottom of a page.

If you indent the first line, a rule of thumb is to set the indent to the same value as your type size. If you have a short line length, a smaller indent may look better. Indenting first lines is the better option if you want to save space.

4.9 You can use indentation to distinguish the beginning of paragraphs. Use a shorter indent than is traditional in typewritten documents. There is no need to indent the first line of a section – the fact that it follows a heading makes its status clear enough.

Opportunities in Europe after 1992

It might also be protested that, as far as British growers are concerned, withdrawal is of minimum importance. Whilst it is true that relatively little is withdrawn in the UK, the market inter-linkages within the European Community, particularly after 1992, must not be forgotten.

In a Single European Market a domino effect prevails, and withdrawal mechanisms help support British market prices as well as market prices in the countries in which withdrawal actually takes place.

The UK does not have to produce peaches for its horticultural producers to benefit from the EEC withdrawal mechanisms for peaches, for in the absence of such heavy withdrawals as have

4.10 Extra space between paragraphs is an alternative to indentation, but is less economical with space.

Opportunities in Europe after 1992

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Section 5 Typography is not typing

not "inch" or 'feet' signs
but real quotation
marks , or 'guillemets"
and "Anf hrungszeichen"

hyphens for word division
and compound words like
frost-bitten

en dashes — spaced like
this — for parenthetical
remarks, and unspaced for
spans, such as: 1992–93

em dashes unspaced like
this can also be used for
parenthesis

5.1 Conventions in professional typesetting differ from those used in typing.

fixer	fixer
a float	a float
fi	fi
fl	fl

5.2 Ligatures for f-combinations. The letters are designed together rather than crashing into each other.

don't underline type
don't underline *type*

5.3 Underlining cuts through the descenders of letters: use italic instead.

5.1 Office practice versus printing practice

When all office documents were typewritten, the conventions of typing were appropriate for the details of text: the typewriter typeface conveyed a certain level of formality, and the limited flexibility of the typewriter was acceptable. There are usually imitation typewriter typefaces available on most systems, and some people prefer to use them for correspondence to preserve the impression of a document less formal than, for example, a bound report. Using typewriter typefaces will also save time because you will not need to worry about the typographic details necessary when you use the professional typefaces available on DTP systems (e.g. Times New Roman, Arial, etc.). However, if you do choose to use more formal typefaces traditionally only available from typesetters, you should use typesetters', not typists', conventions.

5.2 Aspects of typographic style

Certain basic features of typing style have never been current in professional typesetting and should be avoided in your documents:

- Do not use a double word space after full stops, only use one.
- Straight inch marks (") and feet marks (') should not be used for true 'curly' quotation marks.
- For the character combinations fi and fl, use ligatures.
- Use proper en and em dashes when appropriate.
- Don't underline type. In DTP, you can use italic or bold for emphasis. Italic is most often used to distinguish titles of publications.

These are basic features; you may also wish to define a 'house-style' so that you ensure consistency of spelling, capitalization, punctuation, etc. in your organization.

Some of the best known guides to text presentation come from the large university presses. But they are used widely, not just for academic books:

J. Butcher, *Copy-editing: the Cambridge handbook*, 2nd edition, Cambridge, Cambridge University Press, 1983.

The Chicago manual of style, 13th edition, Chicago, University of Chicago Press, 1982.

Xerox publishing standards: a manual of style and design, New York, Watson Guptill, 1988.

Section 6 Reports and proposals

Planning

‘Reports and proposals’ covers a wide range of documents used in business and other organizations, including:

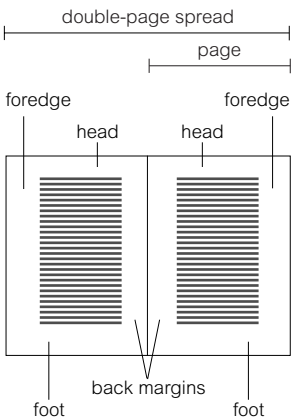
- sales reports
- progress reports
- grant proposals
- procurement proposals
- position papers
- procedural manuals.

For shorthand, the word ‘report’ is used here to cover them all.

6.1 Page size

There may already be some restrictions on the page size you choose depending on your method of production and distribution. If you aim to output pages on a desktop printer and produce multiple copies by photocopying, then a standard size like A4 (297 × 210 mm) or US letter (11 × 8½ inches) is advisable. If you are having your report professionally printed, any page size is possible, although it will be cheaper and easier for printers to work with standard sizes. You may also be restricted to a standard size by the envelopes you will use to send the report to your readers.

Given that most company reports are A4 or US letter (and this is an expected ‘norm’), it would be hard to find a good reason for using an irregular page size. You should therefore accept this constraint, so that you can concentrate on more important issues.



6.1 The margins of a double-page spread.

6.2 Margins

Most DTP programs start by asking you to define your margins, the area between the text and the edge of the page. Most reports will be bound using the sort of office binding that can take up quite a bit of page space, so you should treat the inner 35 mm (1½ inches), the back margin, as out of bounds. Your minimum margin for the outside edge of the page is dictated by the limits of your laser printer (usually about 5 mm or ¼ inch), but for comfortable handling, you should leave at least 12 mm (½ inch)

and considerably more if you are using a single column layout on A4 paper (otherwise your line length will be too long – see *Section 4.2 Type size, line length, and leading*). Remember that by defining your margins you are effectively defining your line length. It may be easier to work backwards: decide a suitable line length and then calculate what the margins need to be.

6.3 A page grid

A grid is the framework of guidelines (made visible on your screen in page make-up programs) to assist page layout. These guides allow you to systematically position headings, paragraphs, and pictures on a page, so that the document is consistently arranged over a series of pages. This consistency then helps readers find the information they need page after page.

The kind of grid you need depends on what you want to put in your document. Reports normally use quite simple grids. Here are three well-tried alternatives.

<p>Conclusion</p> <p>It might also be pointed out, as far as British growers are concerned, withdrawal is of minimum importance. What it is true that relatively little is withdrawn in the UK, the market arrangements within the European Community, particularly after 1992, must not be forgotten. In a Single European Market a domestic effort prevails, and withdrawal mechanisms help support British market prices as well as market prices in the countries in which withdrawal actually takes place.</p> <p>The stability of market prices</p> <p>The UK does not have to produce peaches for its horticultural producers to benefit from the EEC withdrawal mechanisms for peaches, in the absence of such heavy withdrawal as has occurred in the past. It is conceivable that larger quantities of lower-priced peaches could appear in British shops, eroding the market for other fresh produce in season at the time.</p> <p>In 1989, a Committee of the European Parliament challenged the view that withdrawal supported market prices to the detriment of consumer interests. In particular it said: "Given that they are a form of price and income support, there might be a temptation to view the arrangements for withdrawal of fruit and vegetables as being against consumer interests. Indeed, this is the argument put forward by nearly all consumer associations: they attempt to express their concerns that consumer prices of fruit and vegetables would be very much lower if there was no intervention. Yet what they do not say is that stable retail prices cannot be achieved without the provision of fruit and vegetable subsidies."</p> <p>Implications of 1992</p> <p>Provisions, however, will not be adequate unless producers have a continuing incentive to produce and maintain high supply levels. On the other hand, without intervention arrangements many producers would often be left without profits or income, with the long-term risk that the incentive to produce would wane and supply levels fall, thus leading to increased consumer prices. Doing</p>

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Single column grids are simplest of all and are perfectly adequate for a report consisting mostly of straightforward text. Word-processing software can handle this.

Single column grids with side features allow you to put headings, small illustrations, or side-notes in the margin so that they can be easily scanned. When laying out a document with side-by-side text columns, you really need a page make-up program. These programs are less flexible for word processing, so you don't want to do extensive editing once the pages are made up.

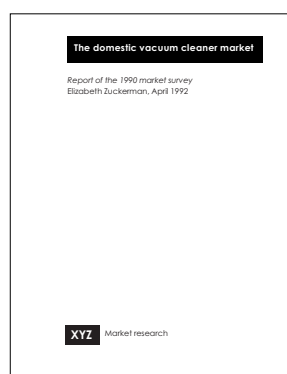
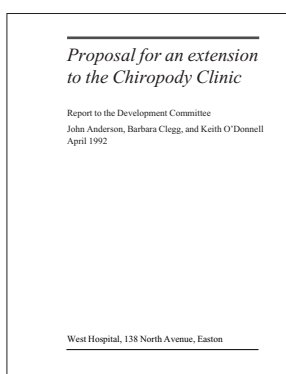
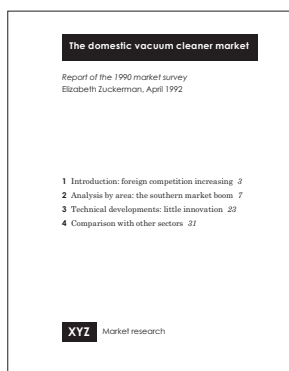
Double column grids can be used for economy, because you can use a smaller type size. They are not common in reports or proposals because they can be more difficult for readers to scan quickly.

Section 7 Reports and proposals

Document organization

7.1 (right) Simple covers are effective, so that the title is clearly conveyed.

7.2 (below) If your report has a simple structure, you could combine the title page and contents list.



7.1 Cover and preliminary material

The cover should identify what the report is about, who it is from, and the date of production. A simple cover will be most effective.

The title page usually contains the same information as the cover. In a short report it may be best combined with the contents list. The contents list must work with the headings, running heads, and other features of the report to enable easy access to information (see *Section 3.1 Access structure*, and *Section 9 Making your message clear*).

7.3 Lining the page numbers up on the right-hand edge of the column doesn't help readers to access the information (**right**). If you're in doubt about this, think about the way you read a contents list: you don't scan down the column of page numbers to see what's on page 13 – you scan down the headings for the one you want, then go to the page number. This is easier to do if the number is close, not separated by a void of white space (**far right**).

1	Background	
1.1	History of the site	5
1.2	Why move?	7
2	Criteria for selection	
2.1	Accommodation	9
2.2	Staff retention	10
2.3	Green eld site	11
3	Planning the move	
3.1	Timescale	13
3.2	Costs	14

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7.2 Headers, footers, and page numbers

Readers can find their way around more easily if you repeat the section or chapter title in running heads (or 'headers') at the top of the page (or at the bottom, where they are known as 'footers'). Page numbers should also be clear. They can go in the header or footer line, but they must go on the opposite side to the bound edge, so people can see the numbers when flicking through the report. If there is enough room, they could go in the outside margin (there is no need for the word 'page').

<p>24 <i>NX2</i> concludes that the European Market</p> <p>The UK does not have to produce peaches for its horticultural producers to benefit from the EEC withdrawal arrangements for peaches, for in the absence of such heavy withdrawal as has occurred in the past it is conceivable that larger quantities of lower priced peaches could appear in British shops, ending the market for other fresh produce in season at the time. On the other hand, without intervention arrangements many producers would often be left without any...</p>	<p>Section 4/E Long-term investment 25</p> <p>pro is or income, with the long-term risk that the incentive to produce would cease and supply levels fall, thus leading to increased consumer prices. Doing away with the intervention facilities would consequently lead to lower prices only in the short run, while in the long run consumer prices would rise owing to falling productivity and supply levels. Furthermore, the proportion of consumer income accounted for by food has fallen consistently ever since the common market...</p>	<p>In the event, other intervention arrangements would be necessary to ensure that the UK does not have to produce peaches for its horticultural producers to benefit from the EEC withdrawal arrangements for peaches, for in the absence of such heavy withdrawal as has occurred in the past it is conceivable that larger quantities of lower priced peaches could appear in British shops, ending the market for other fresh produce in season at the time. On the other hand, without intervention arrangements many producers would often be left without any...</p>	<p>26 <i>NX2</i> concludes that the European Market</p> <p>Section 4 Long-term investment 24</p>
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7.4 You can separate the headers and footers from the main text simply by using space, or try using thin rules.

You may want to repeat the title of the report on each page, so if a page is photocopied its source is still clear. This isn't information that readers need when searching through the report, so it can be quite small. You may want to put the section title and page number in the header and the publication title, and possibly the author's name, in the footer.

5 The European market

Clearly, for some products such as table grapes and apples, withdrawal is not an important outlet, whereas for others, such as apples in suitable crop, peaches and main-dates, it is. Options will differ as to the real importance of withdrawal for the other products listed, because it is in the nature of markets for highly perishable goods for unsuitable gluts to emerge from time to time, and the goods reported in table 5 may simply be an institutionalization of gluts which would in any case exist.

5.1 The 1991 survey

It might also be pointed out, that, as far as British growers are concerned, withdrawal is of minimum importance. Whilst it is true that relatively little is withdrawn in the UK, the market inter-linkages within the European Community, particularly after 1992, must not be forgotten. In a Single European Market a domino effect prevails, and withdrawal mechanisms help support British market prices as well as market prices in the countries in which withdrawal actually takes place. The UK does not have to produce peaches for its horticultural producers to benefit from the EEC withdrawal arrangements for peaches, for in the absence of such heavy withdrawals as have occurred in the past it is conceivable that larger quantities of lower-priced peaches could appear in British shops, ending the market for other fresh produce in season at the time.

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7.3 Section headings

To prevent your report from looking too monotonous, and to provide visible landmarks for access, you can make a feature of section headings by using a large, bold or italic style of type, highlighted further by leaving space around it. This will make these pages stand out. If there is a limited amount of space, you may not be able to start a new page at the beginning of each section; if you can, however, it is a good idea. To make your headings stand out, you could either leave a pre-defined space after the last line of the heading, or begin the following text at a fixed 'drop', regardless of the length of the section heading. This means calculating the depth of the longest section heading, and fixing the space to the first line of text. Taken together, all your headings should form a hierarchy (see *Section 9 Making your message clear*), with section headings as the first level.

7.5 You can use prominent type and graphic elements to make section headings stand out.

3 New beginnings

Clearly, for some products such as table grapes and apples, withdrawal is not an important outlet, whereas for others, such as apples in suitable crop, peaches and main-dates, it is. Options will differ as to the real importance of withdrawal for the other products listed, because it is in the nature of markets for highly perishable goods for unsuitable gluts to emerge from time to time, and the goods reported in table 5 may simply reflect an institutionalization of gluts which would in any case exist.

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4 Open season: the effects of de-regulation in the current climate

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7.6 A fixed space follows these section headings so that the text starting position changes.

7.7 A fixed 'drop' is built in to the grid here, so the text always starts at the same position, no matter how long the heading.

Section 8 *Reports and proposals*

Problems of page layout

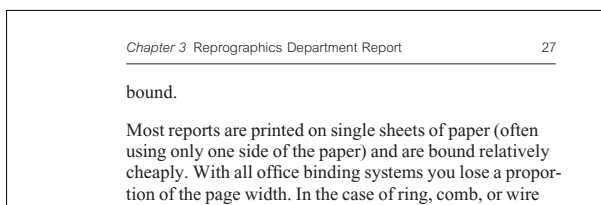
8.1 Page breaks

When you divide your report into pages, it is important to make sure that the page breaks occur at the right places – don't allow single words or lines to appear at the top of a column.

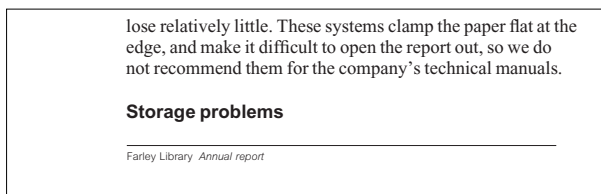
It looks better to have at least two lines of a paragraph at the top or bottom of the page. And make sure that headings don't appear as the last line of a page. They should have at least two lines following them, and more in the case of major headings.

Reports often contain lists of numbered or bullet-ed points. It's best not to break short lists (say, six or fewer lines), but to start the list on a new page.

8.1 The lonely single word at the top of this page can be avoided by forcing a page break early, so that at least one more line of text appears at the top of the page.



8.2 In this example, the heading should be forced on to the next page. Do not worry about pages having unequal depths.



8.2 Placing illustrations and tables

Although most DTP programs allow the text to flow around illustrations (and diagrams and tables), it is best to place them between paragraphs. In a single column grid, an illustration can be placed anywhere on the page. However, if this means that only three or four lines of text would appear above or below it, you might as well align the illustration at the top or bottom. Leave at least one line space between the text and the illustration.

In a double column grid, it is always best to place illustrations at the top or bottom of the page. Although illustrations can be effective in other positions, there is always a risk of the flow of text being broken up in inappropriate ways, making it difficult for the reader to follow the text in the way you intended.

Clearly, for some products such as table grapes and seedlings, withdrawal of an import certificate, which would be necessary to export, would be a significant impediment to the export of such products.

The final analysis

The UK does not have to produce a certificate for the export of products to the United States. The EC, however, does have to produce a certificate for the export of products to the United States. The EC, however, does not have to produce a certificate for the export of products to the United States. The EC, however, does not have to produce a certificate for the export of products to the United States.

Long-term investment

It might also be pointed out, as for all other products, that, as far as the EC is concerned, withdrawal of an import certificate, which would be necessary to export, would be a significant impediment to the export of such products.

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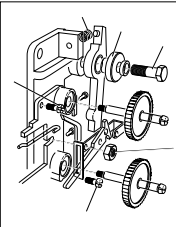
8.3 Be careful when positioning illustrations in double-column grids. In the left-hand page (**above left**), a heading in the right-hand column happens to align with the picture, which might make readers think a new section has started. In the right-hand page (**above right**), the illustration divides the page into two clear, but inappropriate zones. The reader

will not know whether to read 'over' the illustration to the bottom of the first column, before progressing to the next or whether to read both columns above the picture first. The example **above right** shows a better layout: illustrations which span both columns are best placed at the top or bottom of the page.

Runarounds

Most DTP programs allow you to run text around illustrations, and you can define the distance between the text and the illustration. If you have a wide margin to your report, illustrations can go there and runarounds shouldn't be necessary. If you do use runarounds, the illustration shouldn't extend to more than halfway across the column. And be careful with justified type: the narrower column left beside the illustration could have very uneven word spacing.

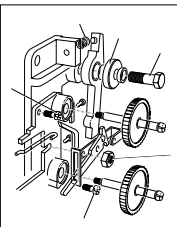
The Data Set was developed and tested with Project members in late 1989. It was intended to be a starting point and a test-bed for data collection, to be varied and augmented as the Project gained experience. It was designed given the expectations for data collection ability at the time and to encourage practices to make full use of the computer systems. Additionally the items chosen were a mixture of those of immediate relevance within the project and of interest to the project team. Data Set cards, listing the data items and of a handy size, were issued as an aide memoire, supported by a more detailed protocol containing the necessary criteria and definitions. The detailed list is shown in Appendix 1.



The extent of data recorded was tested, together with the downloading methodology, in October and again in December. These demonstrated considerable variation between practices, some having most of the Data Set recorded, others very little. A decision was taken to defer electronic postcoding until most practices had been able to check their downloaded registration lists for accuracy. This is a considerable task. On the advice of practices electronic postcoding has been deferred until March or April 1991 to ensure that accurate registration lists are processed.

The Data Set 23

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There is already usable data available for a proportion of the Project population. This will increase over the next months. Data will be downloaded every three months as a check on progress. In order to improve the range of analysis possible, the data download software (ASCN) lists are being augmented, e.g. to allow analysis by age bands, by the development of report generating software.

The Data Set 23

8.4 Rather than reduce the illustration to fit in the margin, or increase it to fill the whole column, a runaround can be a useful solution. However, used badly, runarounds can lead to illegibility in the narrow column that results.

A good solution is to make sure that the illustration takes up less than half the column of type. Don't wrap text around the contour of an image. This makes the text more difficult to read, distracting attention from the message.

Section 9 Reports and proposals

Making your message clear

A-heading

B-heading

C-heading

Text in a serifed typeface works well with headings in sans serif.

9.1 Sans serif typefaces are useful for headings when the text is in a serifed typeface. The two styles contrast and sans serifs often have a range of variants (bold, condensed, etc.), which can be used to signal different levels of heading.

9.1 Using type to show hierarchy

Items that are bigger or bolder are seen as more important than those that are smaller or lighter. This principle allows you to create a hierarchy of headings which will help graphically express the organization of the text. Use changes of style (bold, italic) and size to signal the relative importance of the headings: each heading in a hierarchy has to dominate all those below it. Try to restrict the hierarchy to three levels: section or chapter heading, A-heading and B-heading. Readers may find it hard to keep track of any more.

9.2 Using space to show hierarchy

Typographic distinction may not be enough to make a heading system clear in itself, so you will need to adjust the space between elements to group items together. Things that are closer together will be seen as related: a heading must be closer to the text it governs than to text at a higher level in the hierarchy.

be that graphic design problems (to the extent that they are seen as problems at all) are held to be neither complex nor critical enough to require formal methods.

3.2 Arguments about creativity

So for most graphic designers, feedback first comes in the form of informal peer commentary (comments from colleagues while work is in progress, much as writers ask friends to read their drafts), and second (and often finally) from their client: If it looks

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9.2 Spacing of headings should be visually controlled. Headings with equal space before and after appear to 'float' between preceding and following text (**top**). When there is clearly more space before than after, they attach to the following text (**bottom**).

From bookshelf to desktop: what the reader tells the designer

29

readers have many different purposes for reading, that they engage in many different kinds of reading activity, and do it in many different kinds of environment.

3 Design method: the absent centre

All designers need feedback about the results of their work. Most thoughtful designers think about how and when to get it, about the form in which it comes, and about how to assess its value. But few graphic designers engage in the kind of empirical testing that engineering designers, say, would do as a matter of course. Nobody would wish designers of bridges and aeroplane wings to adopt the methods of graphic designers.

3.1 Objections to design methods research

One strong disincentive to formal enquiries about the results of design decisions is the common folklore that testing or research inhibits creativity and even common humanity. Despite the work of journals like *Visible Language*, to many graphic designers research appears to mean questionnaires in shopping malls, as in a recent *eri de coeur*: clients who have been persuaded ... to use market research instead of intuition ... need to be re-educated by designers into thinking on a more human scale. Another disincentive may be that designers don't have the skills to conduct formal enquiries. Another is that designers are often concerned primarily with personal style: The core of our philosophy is the belief that design is based on personal expression. Another may be that graphic design problems (to the extent that they are seen as problems at all) are held to be neither complex nor critical enough to require formal methods.

3.2 Arguments about creativity

So for most graphic designers, feedback first comes in the form of informal peer commentary (comments from colleagues while work is in progress, much as writers ask friends to read their drafts), and second (and often finally) from their client: If it looks terrific, then that's all I care about. After the looks, and strictly of secondary importance, comes client approval. And this feedback

9.3 A controlled series of inter-line space values is assigned to these heading styles. Note the descending order of size from ■ to ●.

9.4 The same spacing principle – that elements closer together are seen to belong together – applies to all elements. In this price list the figures relating to the left-hand column are physically closer to the goods in the right-hand column – readers could make mistakes.

Dry marker, black	0.50	Hi-lite pen, orange	0.30
Dry marker, blue	0.50	Hi-lite pen, pink	0.30
Dry marker, green	0.50	Hi-lite pen, yellow	0.30
Dry marker, orange	0.50	Pencil, black lead (10)	0.75
Dry marker, red	0.50	Pencil, blue (10)	0.75
Ballpoint pen, black	0.25	Fine-line pen, black	0.55
Ballpoint pen, blue	0.25	Fine-line pen, blue	0.55
Ballpoint pen, green	0.25	Fine-line pen, red	0.55
Ballpoint pen, red	0.25	Fine-line pen, green	0.55
Hi-lite pen, blue	0.30	Fine-line pen, orange	0.55

9.3 Visual identity

Different parts of a text can be assigned different styles which are not necessarily hierarchical. Summaries and side-notes, for example, sit outside the main argument and comment on it: they can be in a different typeface, as if they are being spoken in a different voice. Even though they may be pages apart, they will be seen as belonging to the same category of information because of their similarity.

9.5 A different typeface distinguishes these side-notes as a separate category of information.

3 Management education

■ The 1963 Franks Report was enthusiastic about the American model and was largely responsible for the fact that MBA courses in the UK were modelled on their US counterparts

3.1 Proliferation of courses

Although Franks recommended establishing a relatively small number of centres of excellence, there are now over 70 institutions conferring qualifications in this area. They are competing for students as well as scarce teaching resources.

3.2 Priorities

In many cases the establishment of a management course reflects the hope of high fee incomes rather than a genuine commitment to management education. But there will soon be competition from continental business schools who will offer an international dimension that students will view

Section 10 Reports and proposals

Alternatives to text

Certain information is often much clearer if it is not buried in the flow of a sentence. You may want the reader to follow instructions, or compare totals of research findings, for example. Lists, tables, graphs, and charts can give a more distinct representation of this kind of information, and will also add variety to the layout of your document.

- 1 Switch on the computer
- 2 When the screen shows `C >`, insert Disk 1
- 3 Type `COPY A: PROG. EXE`
C:

10.1 Numbered lists should be simple: don't put the numbers in brackets or punctuate them – space is enough to separate them from the words. For more impact you could put the number in bold type or a different typeface.

10.1 Lists

Numbers, bullets, and sorts

It helps to list collections of related ideas. Where items are referred to individually in the following text, or when they describe a sequence of actions, they can be numbered, but otherwise it is simpler just to use bullets (•) or dashes (–). These can be found in all typefaces, but if you want to make more impact you can use the Monotype Sorts font (■●◆).

Be careful not to over-use lists: there must always be enough conventional text to lead your readers through your argument. Otherwise it's like giving them self-assembly furniture with no assembly instructions: everything they need is there, but they don't know what it's for.

You can reach the airport

- by cab
- by car
- by bus

10.2 If the items in your list are single words or short phrases, you don't need to use a capital letter at the beginning or punctuation at the end of each line.

There are three ways to get to the airport.

- The conference organizer can arrange for a cab to pick you up after the conference.
- If you have rented a car from one of the major car rental firms, you can leave it at the airport.
- The airport bus runs every 30 minutes from the Plaza Hotel.

10.3 If each item is a whole sentence, use conventional punctuation (capital letter at the beginning and full stop/period at the end). Turnover lines look better indented to align with the first word of the item.

10.2 Tables

Some basic table terminology

- Row headings: the headings that run down the left of a table. Each one defines the row to its right.
- Column headings: the headings that run along the top of a table. Each one defines the column beneath it.
- Cells: the spaces in the main body of the table in which the content (figures or text) is put.

DTP allows great flexibility for the design of tables, but they take a bit of skill and practice. There are several ways of setting tables: if you see tables you find particularly clear you could copy the way they are designed. However, always bear in mind that your text is different and may need special treatment. Remember to put the user first, not your own design preferences. Here one system is recommended that is easy to implement in most software and for most purposes.

Vertical and horizontal rules

These days vertical rules are usually left out of tables because the data in the columns is well enough aligned to allow the space between the columns to do the same job. If many of the cells are left blank, though, vertical rules might be needed. You should use horizontal rules to help people read across tables. By varying the thickness of the rules you can emphasize different sections. Vertical rules are usually more difficult to use in DTP software than horizontal ones, which can be anchored to the line of type and so don't have to be adjusted separately if the text above is edited.

10.4 The horizontal space between cells is almost always greater than the vertical space, so readers often need horizontal rules to help them scan across rows (**right**), but may not need vertical rules to help them scan down columns.

Income in 1991 (\$000)			
	North	South	East
Networks Division	1,279	1,457	987
Management Services	3,908	2,341	1,067
Materials Handling	456	645	597
<i>Total</i>	5,643	4,443	2,651

Income in 1991 (\$000)			
	North	South	East
Networks Division	1,279	1,457	987
Management Services	3,908	2,341	1,067
Materials Handling	456	645	597
<i>Total</i>	5,643	4,443	2,651

Short heading	A longer multi-line heading

10.5 A long heading hung from the same point as a short one. Use a horizontal line underneath to divide headings from data.

Column headings

Write short headings for tables, and abbreviate where you can. If some column headings have to be split over more than one line, align the headings at the top. But because the headings will no longer form a distinct line, it is a good idea to use a horizontal rule below them, to distinguish clearly between the heading area and the table content.

	Personnel	Sales	Regional offices	Dealers
North	8	457,353	2	24
South	12	2,341,230	3	56

10.6 The column headings in this table are evenly spaced, but look wrong.

	Personnel	Sales	Regional offices	Dealers
North	8	457,353	2	24
South	12	2,341,230	3	56

10.7 Because the data in one column is much longer than the data in the others, the table needs to be re-spaced by eye.

The second column shows how the left-hand edge of the column heading should align with the left-hand of the longest cell in the column.

Estimating the width of columns

If each table has a different number of columns and perhaps different kinds of data to go in the cells, you'll have to treat each table as a separate design problem.

The good thing about DTP is that you can easily try things out on screen and quickly proof your trials on paper. Set your headings with tabs between, and then adjust the tabs until the headings all fit on the page with the same amount of space between them. Once you've entered the data in the cells of the table, you'll need to adjust it again so that there is a visual balance between the columns – the reader should see them as equally spaced even if the content varies in width.

Aligning data with column headings

Where the cells have text in them, they can line up on the left with the column heading above. Where they have figures that have to be aligned on the right, you can use right tabs and decimal tabs. But you will have to align them with the column heading by eye.

Row headings

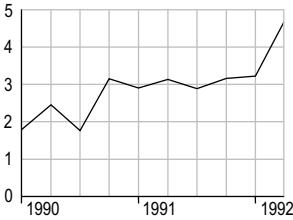
Write short headings, if you can. If you have to go to a second line, indent it slightly, or make sure there is more space between each row heading than between the lines in a single heading.

	Tractors	Cars			Trucks		
		under 2 litre	2 litre +	total cars	under 20 tons	20 tons +	total trucks
1988	340	6,386	3,592	9,978	2,386	1,187	3,573
1989	401	7,483	3,345	10,828	1,987	1,908	3,885

10.8 You can use typographic variation and horizontal rules to set up a hierarchy of column headings where necessary.

10.3 Graphs and charts

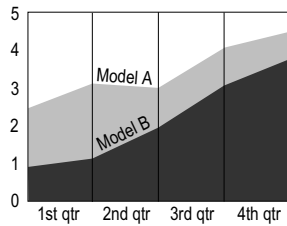
There are numerous specialized graphs and charts, some of which are specific to particular subject areas. But for general purposes, most people want to do one of three things: they want to show trends, compare totals, or compare proportions.



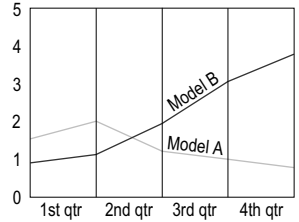
10.9 Graphs are best for showing how a situation changes over time.

Showing trends

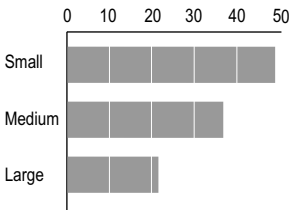
A traditional graph is the best way of showing a trend over time. Time is always displayed on the 'x' axis (horizontally) and the data points are joined by straight lines. Readers can easily see if there is a trend in the data.



10.10 Avoid stacked line graphs. In this example, readers can't tell if the top line represents orders for Model A, or if it is the total of Model A and Model B.



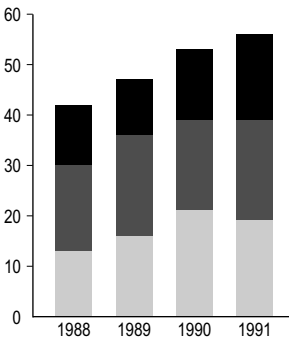
If this represents the true picture, then the stacked line graph on the left is very misleading – it implies that all is well, whereas actually Model A's decline is hidden by the success of Model B.



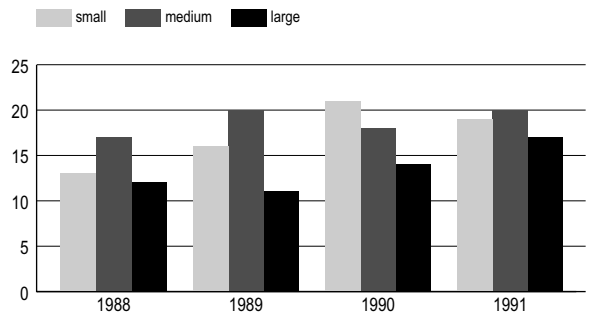
10.11 A bar chart – good for single totals.

Comparing totals and proportions

Bar or column charts are the simplest way of comparing totals and proportions. Bar charts run horizontally and should only be used for comparison of single bars. Column charts run vertically and are ideal for both single columns and column clusters.



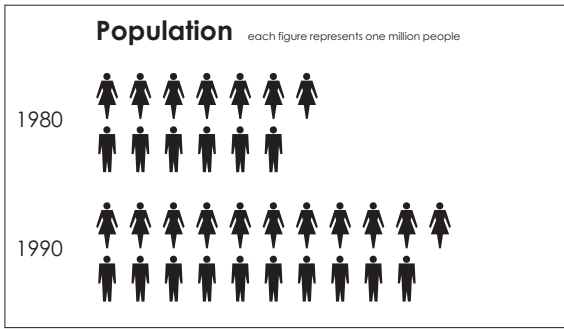
10.12 A stacked column chart shows the breakdown of a total into subtotals. But because the different sections begin at different points, it is difficult to make an accurate comparison.



If it is important that readers compare the subtotals, you should use column clusters instead. The use of rules to define the scale all the way across the chart provides a useful point of comparison to assess the totals of columns, especially those furthest from the axis. It may be helpful to repeat the y-axis on the right-hand side too.



10.13 It is impossible to tell whether we are meant to compare the area or the height of these symbols. Area is not a good unit for comparison because people aren't good at judging surface area.



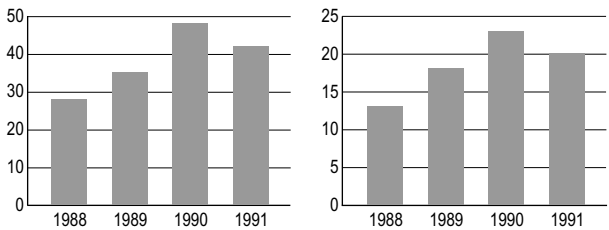
It is better to repeat the symbols, each one representing a set number of objects (this system is sometimes known as Isotype, after the Isotype Institute where it was first developed).

Bar and column charts allow a direct comparison between lengths that start at the same base – something the human eye is very good at. Avoid techniques that don't allow such a simple comparison – including stacked bar charts and different sized symbols. Use side-by-side bars or repeated symbols instead.

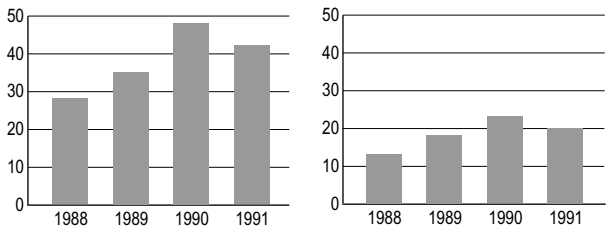
Many spreadsheet programs offer a dazzling array of statistical graphics, including three-dimensional effects and shadows. Be ultra-critical – make sure that you really need the techniques offered and that they won't just obscure your data.

If you create your charts in a drawing program and then import them into a page make-up program, stretching can distort the chart (and distort the type contained in it). Sizing must be done carefully to preserve the proportions.

10.14 For more than one chart dealing with the same values ensure that the graphic picture of the data is reliable. This example gives the false impression that totals are similar in both charts, because the y-axis is changed to fit the available space.



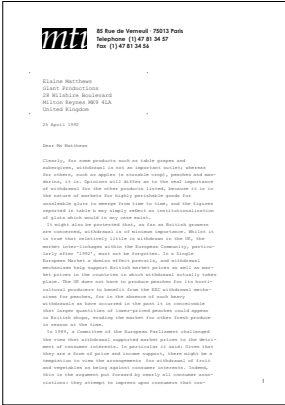
In this example, it is clear that the totals in the first chart are generally higher, because the same y-axis is maintained in each chart.



For a wide range of examples of well-designed graphs and charts:

Edward Tufte, *The visual display of quantitative information*, Cheshire, Connecticut, Graphics Press, 1983.

Section 11 Letters, memos, and faxes Setting standards



11.1 The text in these two documents (a letter and a fax) conforms to a standard of typeface, type size, interline space, and line length.

Correspondence to your customers or clients will influence their everyday impression of your organization. Now that DTP offers the opportunity to make your letters and faxes appear typeset (not typewritten) by the use of printers' typefaces, you must make sure that details of layout and text design are correspondingly professional. Even internal memos are important in communicating information to your colleagues clearly, so that business runs more smoothly.

As correspondence may be produced by many people within an organization, it is important that a standard style is set up, so that the image of a coherent organization is presented. You could set up a template file for each kind of document you produce. Factors that should remain constant are:

- information about your organization
- typeface
- type size
- leading
- text area
- house-style (see *Section 5.2 Aspects of typographic style*).

With a template file, all employees can simply type in the new information without worrying about the layout. This will benefit both you and your readers: you save valuable time and your readers will be able to concentrate on the content of your correspondence rather than being diverted by unnecessary variety in its presentation.

11.1 Stationery

Because letters and faxes are everyday documents, which need a stamp of identity, you will probably have a range of pre-printed stationery. This bears the details of your organization, sometimes with a logo or namestyle.

Page size

Most headed paper will be of standard size (A4 or US letter): there is really no other choice, as you will have to feed the paper through your printer and probably use standard envelopes designed to accommodate these sizes.

If you are likely to use window envelopes, you should check that your letterhead conforms to the relevant standards (e.g. British Standard or US Postal Service Guide). These standards give guidelines for the areas to be left blank, so that the recipient's address will be visible through a window envelope. Your letterhead may have an indication of this area to guide you in typing the address: if not, you could set up some guides on a template. It is worth sending a copy of a letter to yourself to see if the address is still visible after the rigours of the post, and to see what your letter looks like to a recipient.

If in the course of your business, you use reference numbers on your letters, it may be difficult to align a number that you are typing with an associated heading on your pre-printed stationery. A better option might be to have the heading on your template file, so that you can align the reference number with it directly.

Similarly, if your headed paper does not indicate where you should begin the text of your letter, you could define a specific point. You could mark the starting point in your template file or, if you are using a word-processing program, adjust the page-setup parameters so that you always start typing at the correct position.

Faxes

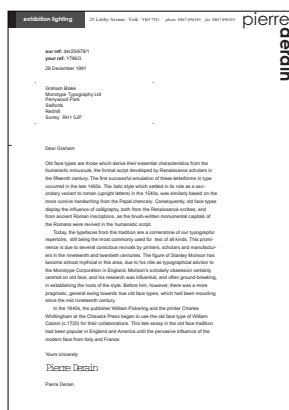
Faxes must include the same information about you as your letterhead. For this reason, you may want to use the same headed paper and even the same standard text style. However, beware of the effects faxing has on type: some of the essential information in a letterhead may be in quite small type, which may become illegible after faxing, so you may want to set up your own separate headed paper for faxing (see *Section 14 Technology and type*). Try them out to make sure they are legible after transmission.

The following publications give guidance on formats for stationery and envelope sizes for mailing:

BS 1808 : 1985 (1990) *Specification for cut business forms and letterheads*, London, British Standards Institution, 1990.

A guide to business mail preparation, (Publication 25), Washington DC, US Postal Service, 1988.

The Post Office Guide, London, The Post Office, 1986.



11.2 This letterhead conforms to the British Standard recommendations. The left-hand margin is at least 20mm to allow users to punch holes for filing without damaging the printed area.

The area for the address is indicated by some small marks, so that it remains visible when the letter is folded and inserted into a standard window envelope. You should allow about 7mm for slippage between the address and the edge of the window.

There is also a small mark on the left-hand edge to guide folding.

Section 12 Letters, memos, and faxes Layout

Interactive systems analysis	200 West 23rd Street Wilmington MA 01897
visage	Tel (508) 769-8000 Fax (508) 769-8001
<p>Elaine Matthews Giant productions 28 Wiltshire Boulevard Milton Keynes MK9 4LA United Kingdom</p> <p>25 April 1992</p> <p>Dear Ms Matthews</p> <p>Clearly, for some products such as table grapes and aubergines, withdrawal is not an important outlet whereas for others, such as apples (a storable crop), peaches and mandarins, it is. Opinions will differ as to the real importance of withdrawal for the other products listed, because it is in the nature of markets for highly perishable goods for unsalable gluts to emerge from time to time, and the figures reported in table b may simply reflect an institutionalisation of gluts which would in any case exist.</p> <p>It might also be protested that, as far as British growers are concerned, withdrawal is of minimum importance. Whilst it is true that relatively little is withdrawn in the UK, the market inter-linkages within the European Community, particularly after '1992', must not be forgotten. In a Single European Market a domino effect prevails, and withdrawal mechanisms help support British market prices as well as market prices in the countries in which withdrawal actually takes place. The UK does not have to produce peaches for its horticultural producers to benefit from the EEC withdrawal mechanisms for peaches, for in the absence of such heavy withdrawals as have occurred in the past it is conceivable that large quantities of lower-priced peaches could appear in British shops, eroding the market for other fresh produce in season at the time.</p> <p>In 1989, a Committee of the European Parliament challenged the view that withdrawal supported market prices to the detriment of consumer interests. In particular it said: given that they are a form of price and income support, there might be a temptation to view the arrange-</p>	
1	

Interactive systems analysis	200 West 23rd Street Wilmington MA 01897
visage	Tel (508) 769-8000 Fax (508) 769-8001
<p>Elaine Matthews Giant productions 28 Wiltshire Boulevard Milton Keynes MK9 4LA United Kingdom</p> <p>25 April 1992</p> <p>Dear Ms Matthews</p> <p>Clearly, for some products such as table grapes and aubergines, withdrawal is not an important outlet; whereas for others, such as apples (a storable crop), peaches and mandarins, it is. Opinions will differ as to the real importance of withdrawal for the other products listed, because it is in the nature of markets for highly perishable goods for unsalable gluts to emerge from time to time, and the figures reported in table b may simply reflect an institutionalization of gluts which would in any case exist.</p> <p>It might also be protested that, as far as British growers are concerned, withdrawal is of minimum importance. Whilst it is true that relatively little is withdrawn in the UK, the market inter-linkages within the European Community, particularly after '1992', must not be forgotten. In a Single European Market a domino effect prevails, and withdrawal mechanisms help support British market prices as well as market prices in the countries in which withdrawal actually takes place. The UK does not have to produce peaches for its horticultural producers to benefit from the EEC withdrawal mechanisms for peaches, for in the absence of such heavy withdrawals as have occurred in the past it is conceivable that larger quantities of lower-priced peaches could appear in British shops, eroding the market for other fresh produce in season at the time.</p>	
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12.1 If your letterhead demands that you align the left-hand edge of your text with it, you don't have to fill the page (**above left**). If you do have a wide column (**above right**), a larger type size will be necessary, which may look clumsier than a more typical text size.

12.1 Are grids relevant?

Complexities of column arrangement are not really applicable to letters. Despite the facilities offered by DTP, the conventions of letter layout still dictate a single column. If you produce a letter in two columns, it simply won't look like a letter. If you use a single column, you do not have to fill the width of the page: a moderate line length will mean that your type size can be within the desired range for text (9 to 11 point), whereas a longer line might require 12 point or more, so that the lines do not exceed 70 characters in length.

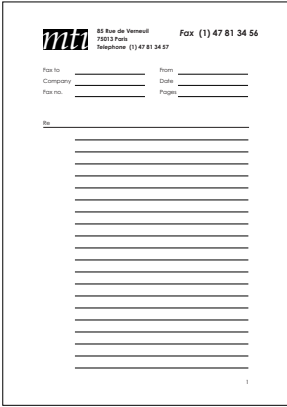
12.2 Space after address

The space between the address and the text of the letter should make it clear that they are separate units. If the date immediately follows the address, it should be separated by extra space, but the space between the date and 'Dear Sir/Madam' should be greater. This will separate the information into groups, as elements close together are seen as belonging to each other (See *Section 9 Making your message clear*).

<p>Dianne Westerley Daisy Chain Inc. 789 Addison Avenue Chicago Illinois 20309</p> <p>29 April 1992</p> <p>Dear Ms Westerley</p> <p>I acknowledge your request for greater control over the daily of the project. Unfortunately monitor the progress from the</p>

Section 13 Letters, memos, and faxes

Points of information



It may not seem that a planned structure is necessary for correspondence, with its very common rules and conventions. But you should try to think of every possible use of the document and of anything that could go wrong along the way. If a letter or fax has more than one sheet, for example, they may get separated: so you should include the name of the sender and a page number on each page. Pre-printed headed paper, with special continuation sheets, usually contains abbreviated information. This is not so vital with faxes, as the fax machine includes the date and at least the fax number of the sender, but page numbers are especially important.

13.1 The two pieces of information you should feature most prominently on a fax are the recipient's name and the sender's identity. As faxes are often retrieved from a central machine, the recipient may find their fax more easily if they spot their own name or that of the organization they are expecting to hear from.

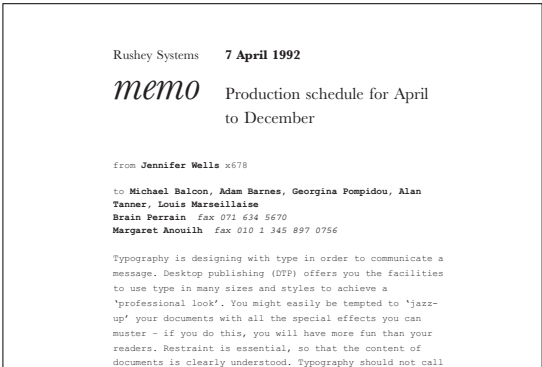
A fax might easily be sent to the wrong number. So however informal your communication, don't be tempted to leave out essential identifying information. The reader's main priority is to find out what's been said, by whom, when, and how they can reply.

It is also essential to indicate how many pages you are faxing in total, in case the transmission is not effective.

An internal memorandum should feature the word 'memorandum' or 'memo' as a heading, as it needs to distinguish itself quickly from the other kinds of documents that accumulate on a desk. Identifying a memo immediately tells the reader that this is internal communication.

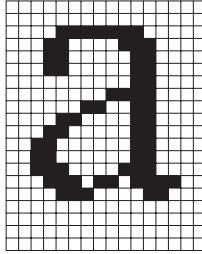
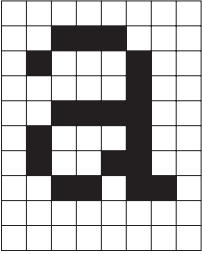
13.2 In this memo, the identifying information is highlighted in bold and separated by space.

As a documented record of a decision or policy which needs to be registered with the appropriate personnel, a memo often needs to be sent to many people. Their names are crucial, as they might be the only instruction to a secretary about who needs a copy of the memo. You might try setting all the identifying information in a different typeface or variant (e.g. bold, italic) to that of the main text: this will give the information a visibly different status.



Section 14 Letters, memos, and faxes

Technology and type



14.1 The smooth outlines of typefaces are broken into digital images according to the resolution of the display or output device. This illustration shows bitmaps for a 12 point character at 72 dots per inch (**far left**) and 144 dots per inch (**left**). Sharper detail can be shown at higher resolution: if type is output from a typesetting machine working at 2450 lines per inch, the jagged 'steps' on the outline are so minute that they are not visible to the naked eye.

14.2 Samples of Monotype typefaces printed at 300 dpi on a laser printer.

10 pt Monotype Bodoni Bold Condensed printed at 300 dpi

Some typefaces with very thin elements are not suitable for medium-resolution output.

10 pt Times New Roman printed at 300 dpi

Times New Roman is a standard choice, but may also suffer due to its fine elements.

10 pt Nimrod printed at 300 dpi

Nimrod is a robust typeface designed specifically for adverse printing conditions.

10 pt Arial printed at 300 dpi

Arial's wide proportions and sturdy weight survive well.

10 pt Courier printed at 300 dpi

Courier, designed for the rigours of the typewriter, is also resilient to medium-resolution output.

14.1 Consider your decisions

Most typefaces are designed for high-resolution typesetting machines (e.g. 1270 lpi), and would not normally reproduce well at medium resolution (e.g. 300 dpi). However typefaces for DTP are specially programmed to look as good as possible at all resolutions.

If your printer is of a low or medium resolution, you should choose your typeface carefully. Typefaces with fine serifs, like Times New Roman or Monotype Bodoni, can lose their elegance and, worse, their legibility.

Photocopying also has unpredictable effects on type – sometimes it makes letters thinner, sometimes thicker. Faxing breaks type into coarse digital elements, a process as unpredictable as photocopying, but almost always worse. Letters can become black blobs or even appear to transform into other letters due to the insensitivity of the process.

To avoid typeface degradation, especially when you cannot predict whether or not a document will be photocopied or faxed:

- Choose a robust and open typeface (not a condensed style). Although it is tempting to use a 'classical' looking typeface, a bolder sans serif design might survive better.
- Avoid small typesizes, so that letters are better defined before copying or transmission.

It is worth doing some trials of photocopying and faxing with different typefaces and sizes to see which combination survives well. You only need to do it once, then stick to the choice you have made as a standard.

With the careful use of type, clear structure, and careful planning, you can make the work of your readers a lot easier.