Designing forms and catalogues

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Monotype

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This design guide will help you to put together complex documents such as forms or catalogues – the kind of documents that make organizations work. You might be producing business or official forms, product catalogues, price lists, or directories. Materials of this kind have two things in common:

Firstly, they contain little continuous text intended for normal reading, but instead they contain tables, lists, points, and other elements, such as answer spaces.

Secondly, they are used to support practical tasks rather than just to give information. Such tasks might include ordering a product, renting a car, collecting market research data, claiming a refund, or interacting in some way with an organization. You will find a strong emphasis throughout this guide on the tasks that documents are used to support – these affect what you choose to include in the document, and the way it should look.

The examples in this Design Guide use Monotype's Amasis and Arial typefaces. Amasis is a seriffed typeface – it is designed to have a solid, robust look that helps to make complex documents clear and legible.

A wide range of Arial fonts have been used – including Light, Black, and Condensed – because forms and catalogues often require many levels of heading, notes, and other categories of information. On many desktop publishing (DTP) systems you can use these together with the fonts already on your laser printer to give you the resources you need to make the organization of your documents clear.

A Personal details

Name

First name

Title

Mr Mrs Miss Ms

Date of birth   Male   Female

Single   Married   Widowed   Divorced

National Insurance number

Address

Postcode

Daytime telephone number

B Personal details of dependant

Name

First name

Title

Mr Mrs Ms

Date of birth   Male   Female

C The pension you are transferring from

Which type of pension are you transferring from?

Personal Pension Plan | If you have ticked any
Freestanding AVC Scheme | of these 3, please go
Retirement Annuity | on to part **D**.
Company Pension Plan | If you have ticked any
Buyout Plan | of these 3, please
Statutory Scheme | answer the next 4
| questions. Then go on
| to part **D**.

C continued

Are you still employed by the company?
No   When did you leave?
Yes

Were you a special director at any time during
the 10 years before the transfer value arose?
You will have been a special director if you controlled at
least 20% of the ordinary share capital of the company,
with one or more associates.
No
Yes   please read the **Note** at the end of this part

Did you have an annual remuneration in any year of
£60,000 or more, during the 10 years before the transfer
value arose?
No
Yes   please read the **Note** at the end of this part

Were you 45 or older at the time of the transfer?
No
Yes   please read the **Note** at the end of this part

Note
You also need to talk to your Financial Adviser.
This is because the Trustees of the scheme that you are
transferring from need to send the Inland Revenue a
Transfer Value Certificate.

D Your Newport Life pension

Do you have a Newport Life Personal Pension
Plan now?
No
Yes   please tell us any policy numbers you have

Have you ever had a Newport Life Personal Pension Plan?
No
Yes   please tell us any policy numbers you had

Please show the percentage of your transfer value that
you want to invest in the following Newport Life funds.
Please make sure the total adds up to 100%.

With profits	%
Mixed	%
International	%
	%
	%
	%
Total	%

Forms, such as this pensions transfer form **above**, and price lists, such as this one for a health food company **below**, are some of the most challenging documents to design. You need the full resources of a DTP system to make the best of them – including fonts, rules, colour, and space.

The Healthy Foods Range

Product code		Case size	Trade	Retail	Cases req'd
	Margarines				
ZGM 086	Vegetable Margarine	12 x 500g	8.82	0.98	
ZGM 087	Vegetable Margarine: Low Salt	24 x 250g	8.64	0.48	
ZGM 088	Sunflower Margarine	12 x 500g	8.55	0.95	
ZGM 089	Vegetable Margarine	6 x 2kg	15.62	3.47	
ZGM 147	Soya Margarine	12 x 500g	8.82	0.98	
ZGM 149	Diet Half Fat Spread	24 x 250g	7.38	0.41	
	Soya milks and desserts				
ZGS 001	Soya Milk	12 x 500ml	4.14	0.46	
ZGS 002	Soya Milk	12 x 1 litre	7.56	0.84	
ZGS 003	Soya Milk: Sugar Free	12 x 500ml	4.14	0.46	
ZGS 004	Soya Milk: Sugar Free	12 x 1 litre	7.56	0.84	
ZGS 005	Soya Milk: Organic Sugar Free	12 x 500ml	4.14	0.46	
ZGS 006	Soya Milk: Organic Sugar Free	12 x 1 litre	7.56	0.84	
ZGS 011	Soya Milk: Carob	12 x 500ml	4.95	0.55	
ZGS 012	Soya Milk: Strawberry	12 x 500ml	4.95	0.55	
ZGS 013	Soya Milk: Coconut	12 x 500ml	4.95	0.55	
ZGS 014	Soya Milk: Banana	12 x 500ml	4.95	0.55	
ZGS 021	Soya Dessert: Vanilla	12 x 525g	5.58	0.62	
ZGS 022	Soya Dessert: Chocolate	12 x 525g	5.58	0.62	
ZGS 023	Soya Dessert: Strawberry	12 x 525g	5.58	0.62	
ZGS 024	Soya Dessert: Banana	12 x 525g	5.58	0.62	
	Soya yogerts				
ZGY 026	Peach Melba Yogert	12 x 125g	3.24	0.36	
ZGY 029	Strawberry Yogert	12 x 125g	3.24	0.36	
ZGY 030	Apricot Yogert	12 x 125g	3.24	0.36	
ZGY 031	Blackcurrant and Apple Yogert	12 x 125g	3.24	0.36	
	Chilled foods				
ZGA 100	Plain Tofu	12 x 256g	7.65	0.85	
ZGA 101	Smoked Tofu	12 x 256g	10.71	1.19	
ZGA 102	Marinated Tofu	12 x 256g	9.81	1.09	
	Spreads				
ZGC 070	Peanut Butter	12 x 340g	8.37	0.93	
ZGC 072	Peanut Crumble	12 x 340g	8.37	0.93	
ZGC 081	Hazelnut Pate	12 x 175g	7.83	0.87	
ZGC 080	Vegetable Pate	24 x 142g	14.22	0.79	
ZGC 082	Soya Bean Paste	12 x 235g	7.29	0.81	
ZGC 076	Yeast Extract	12 x 227g	14.22	1.58	
ZGD 082	Vegetarian Spread: Olive	12 x 200g	12.42	1.38	
ZGD 081	Vegetarian Spread: Mushroom	36 x 25g	8.91	0.33	
ZGD 083	Vegetarian Spread: Mushroom	12 x 200g	12.42	1.38	
ZGD 084	Vegetarian Spread: Herbs	12 x 200g	12.42	1.38	
ZGD 090	Vegetarian Spread: Tomato	12 x 200g	12.42	1.38	

1.1 Forms and their function

Forms are generally thought of as documents which ask you for information, like tax or insurance forms. But a receipt from the stationers, a bill from the water company, or a coupon you fill in for a discount on groceries, are all types of forms. Then there are the business or office forms that we all use to make our work easier. The common factor shared by these documents is that they contain pre-printed information fields to be filled in later by a person, or, as in the case of the water bill, a machine.

Good forms can help your organization work smoothly. Poorly-designed forms have the opposite effect because people write things in the wrong place, give information that isn't relevant, or forget to sign them. Often these mistakes could be avoided by making the form easier to use in the first place – by giving clear instructions about how to use it, providing more answer space, and setting out the information fields in a clearly ordered way.

1.2 Catalogues and other complex documents

Many organizations find that customers make telephone enquiries for information that they already have – if only they could find it in their copy of the catalogue or time-table. This not only wastes time: it gives the customer a bad impression. Better design helps people understand the structure of a complex document, so that they can find the information they need quickly, and without additional help.

This Design Guide identifies things you should think about when writing and designing complex documents, together with the reasons why they can cause problems. It also gives guidance on how to use type, space, and other graphic devices to structure documents in order to make them simple and logical.

Monotype Desktop Solutions designing forms and catalogues

2 The importance of context

Documents need to be considered in their context: how they are to be used and how they relate to other documents used within an organization.

Most documents need to be legible and attractive. That can be difficult enough to achieve, but forms, catalogues, and many other complex documents need to go much further. They need to actually support the way your organization works, so you need to consider:

- who is responsible for the information provided in the document

- how the document is produced, stored, delivered, and filed

- who uses the document (or fills in the form).

2.1 Responsibility for the document

Documents often owe their complexity to the fact that several different departments of an organization are responsible for different aspects of the content. So you may need negotiating skills as well as design skills to make improvements. For example, you may need to work with the legal department if you think your efforts to appear customer-oriented are being spoilt by long lists of terms and conditions written in obscure legal language.

2.2 Production, storage, delivery, and filing

The way your document is to be produced (see *Section 5 Production,* in PUBLISHING GUIDE) will make a difference to how you write and design it. Laser printing is suitable for certain routine documents, such as forms for internal use within an organization. It may also be acceptable for price lists which need frequent updating. But it won't be good enough if you have included illustrations or if you want to use background colours or tints. High-resolution typesetting and professional printing will enable you to reproduce small type-sizes, tints, and illustrations to a high degree of definition. All customer and other external forms and catalogues should, ideally, be typeset at high resolution and professionally printed.

It is worth mailing a copy of your document to yourself to test how it will look when it is received by your customer. If using a window envelope, make sure the address has not slipped out of sight; and check that the envelope was strong enough to protect the document from undue wear and tear.

M+N office equipment   invoice

12 Main Street
Easton
West Newport
WN11 2WN
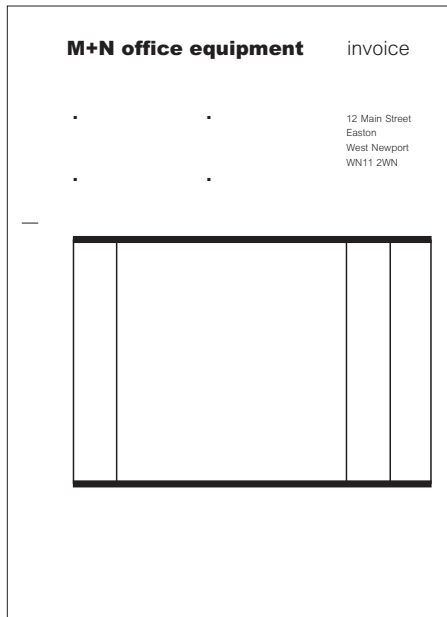
above This form has marks to show the address area for a window envelope, and a fold mark on the left-hand edge to ensure it is folded to the right size.

Guidance on the design of documents that are to be mailed is available in the UK from the Royal Mail and in the USA from the US Postal Service – see page 32 for references.
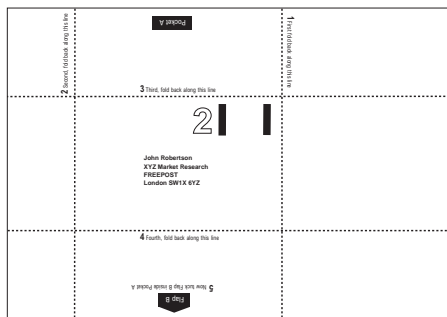
above Questionnaires and simple forms can often be folded into 'self-mailers'.

When you are choosing a format and page layout, think about the way the document will be stored, filed, or mailed. You will want your catalogue or price list to become an easily used reference source for your customers. You should therefore use a conventional size that will be most likely to fit on their book shelves, and you should make sure that the spine allows the user to identify it quickly. If perfect bound (see *Section 5.2 Binding,* in PUBLISHING GUIDE), you can print its title on the spine, but if not you can still use a distinctive colour or design that will help users to identify it from a set of similar documents on a shelf. If you need to supply a set of catalogues, price lists, or other product literature, consider using a wallet, with pockets to hold the different documents together. Again, you can print your company name on the spine.

A form may be just one of a large set, so its title and any reference number need to be clearly visible to a user searching through a filing cabinet.

Forms often need the recipient's address to be visible through the window of an envelope. Unfortunately, window envelopes are not completely standardized so you need to check what is available. Allow about 6 mm ($\frac{1}{4}$ inch) at each edge of the address area for the letter to move about inside the envelope. Keep other information well away from the address area so that it does not show through the window.

2.3 **Your users**

It's very easy to compile documents which make sense to *you* as the writer or designer rather than to your users. Your documents may refer to processes, products, or procedures that are familiar to you but completely new to your users. Good document design means being *considerate* to your users. Think not only about what information they need, but also about how they might want to use the document. For example, a set of assembly instructions is of little use if it is set in such small type that the user has to stop assembly work in order to pick up the document to read it.

The users of your document have to be able to find their way around it easily when they first see it. They will also need to refer back to it and may need to find specific sections quickly. Access to the document therefore needs to be clearly indicated. The next section of this Design Guide shows you how to structure your documents to achieve this.

3 Establishing a structure

You can analyse functional documents like forms and catalogues in terms of the tasks they will be used for, both by your customer and by your organization. This helps you to make sure you include everything you need. A task analysis of a catalogue and an order form might look like this:

The user needs to:	The catalogue needs:
Identify the right price list	Title, source, year
Find the right section	Page headers, contents list, index
Identify relevant products or information	Introductory or marketing text
Identify the right model	Table of technical data
Order goods	Telephone number, or order form and address
Calculate the amount owed	Spaces for prices and totals, including any delivery charges and taxes

The company needs to:	The form needs:
Enter the order into a computer	Space to ensure the customer lists stock codes, quantities, etc.
Compile a delivery note	Space for delivery address
Bill the customer	Space for invoice address, signature, terms of trade
Record the action taken	'Office use' box

The quickest way to improve the usability of a document is to make it more organized. For example, think about the kind of form you might fill in to send a parcel. There are probably spaces for you to write your name and address, the destination of the parcel, and so on, but often there is no clear structure to lead you logically from one part of the form to the next. This section tells you how to establish a structure for your documents which will help everyone using them work faster and more efficiently.

Users of your document will rarely start at the beginning and read carefully through to the end. They are more likely to scan the pages quickly to gain a general overview before deciding what to do next. You can make this process a lot easier and more productive by using typography to show the document's structure.

This point is well understood by the writers and designers of textbooks. Most have a clear structure, moving down from the title, through chapter or section headings, to sub-headings. They also have other access information, such as a contents list at the beginning. This is a good model to keep in mind when establishing a structure, even for very simple documents.

3.1 Defining the tasks which the document will be used for

Start by listing everything you think you will have to include in your document. Then check by listing the processes the document will be used for, and the information each process will require. For example, if the information gathered by a form is to be entered into a computer, you might need to include codes for the data-processing department. Or if customers are going to use a catalogue to order goods, they need to be able to find the telephone number quickly – in many catalogues it's printed on every page.

3.2 Organizing information into hierarchies

The list you have compiled can be reflected in the hierarchical structuring of information in your document. Each level of the hierarchy should be relevant to the user at a different stage of using the document. The way you decide to classify various types of information will affect the relative prominence of the typographic styles that you apply to them, and the way that you lay them out on the page (see *Section 4 Some basic principles of layout*).

It is useful to categorize the information into the following levels, and to consider the design issues associated with each:

- system-level or top-level information that helps users select the right document
- document-level information that helps users find the page they want
- page-level information that helps users see the structure of the information on a page
- item-specific or bottom-level information.

System-level information

In the case of a catalogue or price list, this might be the company name, the product range covered, and the date the document is valid from. On a form it might be a code number and title. You can use a symbol or colour-code which identifies a particular document as part of a set. This level of information may only need to appear on the cover of the document. However, if the catalogue is likely to be photocopied or kept open on a desk, it is a good idea to repeat this reference information in running heads (also known as 'headers') at the top of each page (or at the bottom, where they are known as 'footers'). (See *running head*, *header*, *footer*, in GLOSSARY).

Document-level information

Once users have found a particular document, they need to find the page they want using a contents list, unless the document is only a few pages long. This means providing a good access route that links the contents list with easily-seen visual cues throughout the document – including prominent headings and section numbers. Make sure the headings you use work well as a set when viewed together in the contents list.

Easibed
Mattresses

1991

Easibed
Bed frames

1991

Easibed
Price List

1991

System-level information: the consistent design of a set of documents can help identify each as part of the set.

below Document-level information: try to give users a clear access route to the information they need. Here index tabs are used on the edge of the page to link each section with the contents list.

Easibed 1991

Contents
Bed frames   1
Bunk beds   2
Folding beds   3
Mattresses   4
Bedroom furniture   5
Pillows and duvets 6

Folding beds

The Easifold Collection
The Easifold Collection is the best-selling range of folding beds. Choose from seven models, each with superb finish and durability.

Wall-folding beds
Easifold wall-folding beds are ideal for small flats or bedsits. By day they fold up into the wall; by night they are lowered quickly and safely.

Sofabeds
For occasional guests, Easibed sofabeds quickly convert from a comfortable sofa into a temporary bed – fully sprung and solidly constructed.

3

above Page-level information: this hotel guide provides clear signalling of its structure (the heading 'hotels').

Item-specific information: each item is clearly coded, with different typefaces used for different kinds of information within each section.

Page-level information

At this level the use of typography and space, together with clear language, helps users find what they need once they have found the right page. The more complex the document, the more you need to divide the information into manageable sections using headings.

Item-specific information

Design also has a part to play at the most detailed level of a document's content. Particular kinds of information may need special typographic treatments – for example tables, lists, and question/answer sequences in the case of forms.

3.3 Writing or compiling the document to fit this structure

Your writing can now follow the structure you have sketched out. If you start with system-level information and work down, you are taking the same route as your readers will take – you can therefore make sure that you provide the right amount of information at each level. You may need to edit your text to fit the space available.

Consistency is vital when compiling complex text. For example, if you are writing short summaries to appear at the beginning of each section in a catalogue, remember that your readers may read them as a set – flicking from one to the other as they choose the right section. You should use a consistent style, so that the summaries, when read together, present a coherent overall message.

4 Some basic principles of layout

Major heading

Minor heading

above The relative size of headings should reflect their status in a hierarchy. But very subtle differences can confuse.

below Make the differences in your hierarchy plain to see.

Major heading

Minor heading

2 Your accident description
Please describe how the accident occurred
and give brief details of speeds, weather conditions etc.

3 The scene of the accident
Please make a small drawing of the scene of the accident.
Include traffic signs, junctions, other vehicles etc.

above Use the similarity principle to set up consistent ways of showing each kind of information (here, headings and explanatory notes).

What often makes catalogues, forms, and similar documents complex is the number of different components that have to be combined. Typographic design can help make complex information simpler to understand.

4.1 **Understanding graphic structure**

To clarify the logical structure of your text, it helps to understand a little about the way people understand graphic structure.

Relative size

Type that is bigger or bolder is seen as more important than type that is smaller or lighter: this principle underlies the use of typographic hierarchies (see *Section 6 Typographic coding*).

Similarity

Things that look alike are seen as belonging to the same category; this principle underlies the idea of typographic 'voices' (see *Section 6 Typographic coding*).

Relative proximity

Things that are close together are seen as related. Typographic grids and zones (see *Section 5 Grids*) rely on this principle.

Enclosure

Things that are enclosed in the same space are seen as related. Rules (graphic lines) or boxes use this principle.

left Items which are grouped together are seen as related. This is why careful use of space is important.
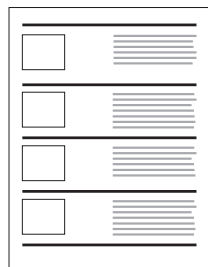
left Items grouped within rules or boxes are seen as related – even if they are separated by space. If they are also aligned, the relationship is further strengthened. It is a combination of these principles that make tables work.

Request form

In this form the questions and the answer spaces fill the page at an uneven rate – sometimes the question is deeper than the answer space and vice versa. If your page looks very uneven, you can use a rule to divide the page between questions or sets of questions. This pulls the page together visually, and also defines content boundaries which might not otherwise be clear.

Coloured background tints

A pale background can be produced either by using a pale ink printed as a solid area, or a tint made of small dots of a darker colour (specified as a percentage of the solid colour). Tints can be applied by most DTP programs, but should be left to the printers at the platemaking stage for the best results. Your printers will also be able to help you with this by showing you sample books of solid colours and tints of those colours in a range of percentages.

Alignment

Things that line up with one another are seen as related. Again, typographic grids use this principle.

As well as guiding your layout in a general way, these principles are useful tools for diagnosing problems with page layout. If a page doesn't look right, you can often trace the reason to a breach of one of these principles. Ask yourself whether things that look related are actually related, and whether the important information stands out.

4.2 **Using rules to simplify pages**

Pages can sometimes look much more complex than they actually are, because sections of information of equal significance take up different amounts of space. Horizontal rules can be used to mark off the space allocated to each section of information.

4.3 **Colour**

Colour is an important resource, and because many professional printers run two-colour presses for all their work it is not necessarily much more expensive than one-colour printing.

However, there are reasons why you should avoid certain colour combinations. You probably have likes and dislikes, and fashions change all the time – but colour choice isn't just a matter of taste. About one in eight men has some degree of red-green colour deficiency (but it's rare among women). So if you use colour-coding – for example, a red dot beside a catalogue item to indicate a special status – reinforce the colour-coding with some other code: in this case the words 'special order', or a specially shaped symbol. Yellow works well as a background colour, but don't use it for text as yellow type on a white background isn't legible.

Your choice of colour does not end when you decide in general terms on red, blue, green, or whatever – you need to be more specific and pick an exact shade. Your colour can then be applied either as a solid or as a tint (see *tint*, in GLOSSARY). Remember that although your printer may show you a sample book with hundreds of colours, your choice may actually be quite limited by practical constraints. Some of these are listed below.

If you want to do this	Choose this sort of colour
Print coloured type on white paper	Dark enough for the type to contrast with the paper
Print black type on the colour	Light enough for the black to show up
Print white type reversed out of the printed colour	Dark enough for the type to be legible
Print, say, a 10% background tint	Bright enough to produce a pleasant colour (some colours look rather dull when used in this way)
Photocopy the document	Dark enough to show up (light blue or green might disappear; red will usually copy well, but may not look different from black)

Information

Information

Information

Information

Coloured backgrounds and tints

A pale background colour is very useful for forms – the response areas can be made easy to see by making them white on a pale-coloured background. This makes the form look orderly and less daunting for the user to fill in. The background needs to be light enough to make overprinted type legible, but dark enough for the white response areas to be clear.

Remember that colour on your computer screen will only approximate the colour of the final printed version, both in terms of absolute colour and contrast and balance. Colour output devices such as thermal wax or inkjet printers will also only give an approximation of the final colour. When you are making decisions about colour, you should refer to a book of ink samples for an accurate assessment.

right Colour is particularly useful in forms where parts to be filled in by the customer are interspersed with parts that are for the company's use only. Here, the boxes the customer has to fill in are highlighted in white.

If you want to use this idea on a multi-part form, use white paper for the top part, and coloured paper for the copies.

Invoice information

Bill all charges to:

☐ sender   ☐ consignee

☐ third party (supply details below)

Service required

☐ Standard   ☐ Priority

☐ Saturday delivery   ☐ FastPak

Pick-up time

Delivery time

Route code

Operator code

Delivery

Duty/tax

Currency conv.

Total

*Monotype Desktop Solutions* DESIGNING FORMS AND CATALOGUES

5 Grids

If you have complex information that you want to lay out systematically, it helps to establish a page grid. The term 'grid' refers to the array of vertical and horizontal guidelines that most DTP programs use to help you position items on a page.

For documents consisting of uninterrupted text you may only use a few guidelines to define the margins at the top, bottom, left, and right of the page. But complex documents like forms and catalogues generally need a more elaborate grid structure designed to help you with the placement of items, and to enable your readers to find their way around. Two kinds of grid which are often used for forms and catalogues are *modular* and *zoned* grids.

5.1 Modular grids

These are grids which define a number of points at which type, tables, or illustrations can be aligned. By keeping to the grid you can be sure that the document as a whole has a consistent appearance, even where each page contains many different elements.

Modular grids are useful if you can't predict exactly what you will have to put on each page, or if the content of each page is very different. Although each page might look quite different from every other page, the document has an overall coherence because all the pages conform to the grid.
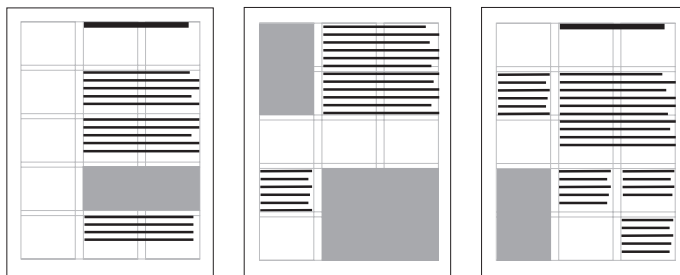
above Using a modular grid, each page can be different, or contain different kinds of information.

The pages still relate as a set, though, because items are aligned at a number of common grid points.

above A series of catalogue pages might use a zoned grid in which the product name, description, and technical data table always appear in their respective zones on each page.

above In this training catalogue, the section title, the course titles, and the course descriptions occupy separate zones, no matter what their length.

5.2 **Zoned grids**

If the content of each page is similar in structure you can use a zoned grid. This is a grid which divides the page into zones to hold different kinds of information.

The zoned grid provides fixed areas within which you can have more flexibility than a modular grid would allow. For example, columns can be different widths, taking whatever space is appropriate for their content. Within one document, you can use different zoned grids for each section to reflect the kind of information found there.

5.3 **Grids: a word of caution**

You will rarely find a document for which it is appropriate to keep to a grid consistently all the way through. At times you will need to break out of the established grid to achieve a particular effect or to accommodate unexpected material. If this happens too frequently, though, you have probably designed an inappropriate grid.

Also, don't feel that you must fill every corner of the page. If you try to do this you may well have to enlarge some sections and squeeze others until the user can no longer see a systematic relationship between the layout and the content. Some forms design software programs seem to encourage this approach, so be prepared to override the program if you have to.

left In this form, columns of equal width are used for every answer space, whether the expected response is short (for example, initials and date of birth) or long (for example, surname and address).

left In this alternative the grid has been 'broken' to allow appropriately sized response boxes. Note that this does not upset the general appearance of the document.

6 Typographic coding

above On this form, each category of information (heading, question, and note) is coded by a distinctive typeface. The large Arial Black clarifies the status of the heading. Arial Light Italic makes the note speak with a different *voice*.

Arial Light
Arial
Arial Bold
Arial Black

You can use your Arial and Amasis fonts to show the relative status of elements in a hierarchical structure (see *Section 3.2 Organizing information into hierarchies*).

You can also use the range of fonts to make a range of items speak with different *voices*. For example, forms may have notes to clarify what information is being requested. Catalogues sometimes have reminders about special offers. These items fall outside the main hierarchy of headings, and so need a different typeface, or some other distinctive treatment.

6.1 Typographic hierarchies

Each heading in a hierarchy has to dominate all of those below it. In this way readers see that less important headings are sub-categories of more important ones.

There are several ways to make one heading or section dominate another.

Boldness
Arial is designed to have a wider range of weights than many other type families, starting with Arial Light and moving up to Arial Black.

Size
Large type dominates small type, although this alone is rarely enough to signal relative importance. You will often need to change both size and boldness to be sure the hierarchy is clear.

Recent Acquisitions
Natural Sciences
Biology
This month we have taken delivery of a complete set of back numbers of the *Journal of Biological Science.* This is good news for

left A hierarchy based solely on size differences is often not as clear as one where typeface variants and space are also used (**right**).

Recent Acquisitions
Natural Sciences

Biology
This month we have taken delivery of a complete set of back numbers of the *Journal of Biological Science.* This is good news for

Be careful about mixing typeface variants within a heading hierarchy. For example, using a large size of Arial Light as a higher-level heading than a slightly smaller size of Arial Black could confuse your readers. If you use lighter-weight fonts in this way, make sure the size difference is quite marked.

Space
Don't rely on type alone to signal your hierarchy. More prominent headings can have more space above them, and they'll probably need some space below, too, so as not to crowd the following text. The treatment of space below is as important as the space above.

Rules
Space is often at a premium in complex documents, so rules can often be used as well as, or instead of, space. Rules allow you to relate groups of items using the enclosure principle (see *Section 4.1 Understanding graphic structure*). Use different thicknesses of rule to reinforce your typographic coding. You can save space by setting major headings in white type reversed out of thick rules.

Output devices

Laser printers

Output devices

Laser printers

above If you use a lighter typeface at a higher level in a hierarchy than a darker typeface, you will have to compensate by making the lighter type much larger in size.

listing the goods in each consignment and the relevant purchase order number.

Terms of business

Prices
Prices are quoted exclusive of postage and delivery charges. VAT must be added at the current rate. The prices quoted here are correct at the time of printing, but please check before ordering.

Delivery
Delivery is by road transport, and is normally between 7 and 10 working days from receipt of order. Goods should be inspected for damage on

left The space above and below headings helps to signal their status. It also makes sure that related information forms appropriate visual clusters on the page.

right Rules can be used to organize information.

In the left-hand example, the directory entries lack visual organization. The right-hand example shows several improvements which help each entry to form a distinct visual unit: the company names are in bold condensed type; the phone numbers now align with the company name to form a straight start to each entry, reinforced by rules.

You can set headings in white type, reversed out of thick rules, to save space and simplify the appearance of a page (see *reversing out,* in GLOSSARY).

Travel Agents

Harris Travel
275 Main Street   (519) 246-4132
Kitchener
Ontario N2G 8D3
Manager: Craig Becker

Kitts Travel Centre
326 Toronto Drive   (519) 244-1234
Waterloo
Ontario N2G 3D8
Manager: Kirsty McLeod

Travel Ontario
4 Conestoga   (519) 944-2234
Kitchener
Ontario N2G 1Q9
Manager: Bill F Earnshaw

Travel World
2 Schneider Plaza   (519) 987-4136
Kitchener
Ontario N2G 6K4
Manager: Pierre Leclerc
Asst. Manager: Jean-Marc Dupont

Travel Agents

Harris Travel   (519) 246-4132
275 Main Street
Kitchener
Ontario N2G 8D3
Manager: Craig Becker

Kitts Travel Centre   (519) 244-1234
326 Toronto Drive
Waterloo
Ontario N2G 3D8
Manager: Kirsty McLeod

Travel Ontario   (519) 944-2234
4 Conestoga
Kitchener
Ontario N2G 1Q9
Manager: Bill F Earnshaw

Travel World   (519) 987-4136
2 Schneider Plaza
Kitchener
Ontario N2G 6K4
Manager: Pierre Leclerc
Asst. Manager: Jean-Marc Dupont

above Because these questions are long, a small typeface has had to be used. ITC Zapf Dingbats have been used to reinforce their presence on the page.

Dingbats

You can use ITC Zapf Dingbats to emphasize a heading (stick to the simple ones like ● ■ ▲). They are especially useful if you have to use a smaller size of type than you would like, perhaps because the headings are rather long.

6.2 Typographic voices

Different fonts make items speak with different voices. Italic can be used to achieve this effect, or try two distinctive typefaces in parallel, perhaps with their own unrelated hierarchical structures. It is quite common to find a section of text – for example, a list of technical data – printed in a sans serif typeface such as Arial, within a document printed in a seriffed typeface such as Amasis. Because the list uses a different typographic voice from the main text, there is no danger of confusing the two structures. This Design Guide uses separate voices for captions and marginal information blocks.

Price list

FREE pickup and delivery with orders over $100

Effective 1 September 1991

Bromide	48 hours	24 hours	Overnight
8½ x 11	$4.00	$5.50	$8.00
11 x 17	$7.00	$9.00	$12.00
Film	48 hours	24 hours	Overnight
8½ x 11	$7.00	$8.50	$11.00
11 x 17	$10.00	$12.00	$15.00

above In this price list, the special offer flash falls outside the normal set of styles used for the main information. Set at an angle, it speaks in a more urgent 'voice'.

Course summary

The *Manage your time* course is designed to help anyone manage their time and so increase their personal effectiveness, both at work and in their personal lives. You will learn how to set priorities and define key tasks in order to concentrate first on activities that produce results.

Last year, Sandra Bradley from Central Administration went on this course and came back full of praise for its practical approach. Highly recommended.

left In this document, the side notes are in a distinctive voice – in this case a different typeface, and a special position on the page.

7 Forms design

Forms divide into two main kinds: business forms typically consist of headings and spaces and are used to record transactions. Questionnaires, usually consisting of question and answer sequences, are used for application forms or market research surveys.

Forms typically consist of short blocks of text together with spaces to enter information. The words and layout have to work closely together. Forms present special design problems, since you will rarely be able to improve the design of a form without changing the words.

7.1 Notes and instructions

Questions and headings should be self-explanatory or accompanied by notes so that users don't have to keep referring to different parts of the form. Notes that don't belong with any particular question should go in the place most appropriate to the task they refer to: at the beginning, for example, if they explain how to fill in the form.

7.2 Asking questions

To save space, remember that one or two words will often work as well as a full sentence. For example 'Surname' will elicit the same response as 'What is your surname?'

Try to ask about one thing at a time: multiple questions are difficult to answer, and the answers difficult to interpret.

Long questions can sometimes be re-written as one short main question, accompanied by explanatory information. At the design stage, you can use one font for the main question, and another, that takes up less space and signals its different status, for the additional information. The main question and the additional information will thus appear to speak with different voices.

Are you over 60 and unemployed or in a low-paid job?

This question could be interpreted in two ways. It is best rewritten as three questions with simple yes/no answers:

Are you over 60?

Are you unemployed?

Are you in a low-paid job?

Have you consulted a doctor in the last five years about anything except colds/flu, minor injuries, routine advice about contraception or pregnancy, and routine inoculation for travel, or do you intend to seek such a consultation in the near future?

☐ Yes   ☐ No

left This question is too long and complex to be understood quickly.

right Here the long question has been divided into a short question plus explanatory notes.

Have you consulted a doctor in the last five years?

*Answer 'yes' for any consultation **except** for colds/flu, minor injuries, routine advice about contraception or pregnancy, and routine inoculation for travel.*

Also answer 'yes' if you intend to seek such a consultation in the near future.

☐ Yes   ☐ No

Small drawn squares can make good tick boxes, but they tend to come adrift from the text when you make changes. Some software allows you to anchor graphics, like boxes, to a line of text. Otherwise use a tick box character from the ITC Zapf Dingbats font (❏).

Our advice on the size of signature boxes is based on research evidence. Although people are expected to write a consistent signature every time, it is common to find them constrained by spaces that are much too small.

7.3 Answer spaces

Tick boxes
Providing tick boxes (check boxes) for responses makes it easy for people to fill in questionnaire-type forms, and for you to process the results. It is not necessary to add an instruction to tick the box: it's normally obvious.

Leaving space to write in
For questions which need a written answer, allow a space 6 mm ($\frac{1}{4}$ inch) deep for each line of writing. Allow five lines for an address (three lines is often enough in the USA). For a signature, leave a space 60×20 mm ($2\frac{1}{2} \times \frac{3}{4}$ inch) if you can.

If you need to leave space for open-ended answers, remember that some people will assume that the size of the answer space indicates how much you want them to write.

Describe how the accident happened

above People may take the space you leave as a cue about the amount of information they should write. This space is fine if all you expect is an answer like 'I tripped over the cat'.

Delivery address (include postcode)

Received in good condition by

Name

Signature

above Leave at least five lines for the address and a generous space for the signature.

Address

Postcode

above The postcode prompt often appears at the bottom right. Right-handed people don't like this because it is covered by their hand as they write the address. And the Post Office like it to be written on a separate line.

below It is better to print it on the left, or to ask for 'address, including postcode' or 'address (don't forget your postcode)'.

Address

Postcode

Street

City

State   Zip

above US addresses are more standardized than those in the UK, so you can supply prompts for each line. The zipcode is written after the state name, so this layout is appropriate.

right Three ways of relating headings to answer spaces. The one on the left should be used with caution. Users could start by writing above the line.

Name

Formatted boxes

If you need to you can make people write one letter in one space by using formatted boxes. This is useful if you have to restrict the number of characters they enter because the information is going in a computer system or on a credit card, for example. Don't use this technique unless you really have to: research shows that people find writing in this way uncomfortable, and the results aren't necessarily more legible for the data-processing person.

Including a prompt in or near the answer box will guide users to give you the right information. This is particularly necessary when you want people from different countries to fill in a date. '6 December 1991' is written '12/6/91' in the USA, but '6/12/91' in the UK, and there are other formats in use elsewhere.

Use answer prompts to make sure people know exactly how to give you the information you need.

$

day   month   year

Try to keep answer spaces consistent – use your grid to set the width you want (but see *Section 5.3 Grids: a word of caution*). If all your spaces start at the same position across the width of the page, your document will look clearer, and data processing will be easier.

Boxes and rules

To define answer spaces, you can use fine rules or boxes. If your document is to be professionally printed, answer spaces can be white boxes reversed out of a background tint.

Customer number

Order date

Shipping date

Terms

Customer number _____

Order date _____

Shipping date _____

Terms _____

Customer number

Order date

Shipping date

Terms

It is a good idea to get someone to fill in a copy of your form as you develop it. Looking at the results will quickly provide you with evidence of any problems, and suggest ways in which you might improve your design.

Response scales

A response scale asks people to select from a range of values, e.g. very easy, easy, fairly easy, fairly difficult, difficult, very difficult. The number of points you choose will affect your results. If you need a clear indication of preference, for example, it is best to use an even number of points. However, people who have no opinion or can't decide will not be able to tell you unless there is a middle point on the scale. Also, remember that some people don't like to use the extremes of a scale, so give between five and seven to choose from.

The problem with this scale is that everyone will have their own interpretation of what, say, 'Rarely' means.

How often do you go to the movies?

Never	Rarely	Sometimes	Often	Very often	Daily
☐	☐	☐	☐	☐	☐

If you can, give people precise ranges to choose from.

How many times did you go to the movies last year?

None	1–5	6–10	11–15	16–20	20 +
☐	☐	☐	☐	☐	☐

In this scale, people are forced to choose between positive and negative judgements.

What do you think of the facilities for children?

Very bad	Bad	Fairly bad	Fairly good	Good	Very good
☐	☐	☐	☐	☐	☐

A middle point on the scale allows people to make a neutral choice.

What do you think of the facilities for children?

Very bad	Bad	Fairly bad	Average	Fairly good	Good	Very good
☐	☐	☐	☐	☐	☐	☐

7.4 **Processing the information**

The information gathered by forms is either keyed into a computer (for data processing), or written down elsewhere (transcribing).

If codes will be used for processing the form, include them on the form when it is printed. Otherwise someone will have to code each completed form. This practice ensures that processing and analysis procedures are planned in advance. If some answers are not to be processed, mark those boxes in some other way.

below Small code numbers next to boxes on a form can be used to relate them to fields in a computer database.

Name		1
Dept		2
Ref no		3

Data processing needs

When designing your form, try to take the needs of data processors into account, but not to the exclusion of everyone else's needs. For example, a computer system may need information about payroll numbers first of all, to access personnel records; but most people will expect the form to start with name and address questions. You will almost certainly have to find a compromise between conflicting needs.

Data processing is easier if the sequence of questions on the form follows the sequence of keying fields on screen; this is particularly important if the form extends over more than one side of paper. It is also helpful if answer spaces start at the same positions across the page, and aren't interrupted by large blocks of text: the data processor can then easily scan down the answers.

Office use sections

Many forms have a section 'For office use only', where information about the processing of the form is recorded. Keep these sections as discreet as you can.

Multi-part sets

A form which is designed to make a number of copies simultaneously is known as a multi-part set. The top copy is physically joined to other copies which are then torn off and used for different purposes. Copies are made using an NCR (No Carbon Required) process. The paper is coated with chemicals that react to the pressure of a pen or typewriter to produce the copies. Multi-part sets can also be made using ordinary paper with tear-out carbon sheets between the copies.

8 Catalogues and price lists

Organizing a catalogue can present you with dilemmas. For example, you might offer two brands of envelopes: Classic and Excel. Should you list them both in a single envelope section, or should you have separate sections for each brand, where the envelopes would appear alongside other items of matching stationery? Some catalogues organize products by brand name; others organize them by product type. You have to make a judgement about the expectations of your customers, and provide an index so they can access the information in the way they choose.

8.1 Accessibility

Writing and designing a catalogue will be easier if you adopt a clear structure both for the whole document, and for each page (see *Section 3 Establishing a structure*). Group your catalogue entries into distinct categories that your customers will find useful (e.g. products, services, exhibits), and make these groupings the chapter or section headings of the catalogue. A contents list that reflects this structure will enable users to find their way around the catalogue quickly and efficiently. Include an index, too: even if users are unsure which section to look in for a particular product, they can get straight to the right page through an index.

If your catalogue has to give different kinds of information, differentiate them by using different fonts, so that each kind of information has its own typographic style and communicates with its own voice (see *Section 6.2 Typographic voices*). You can also use different grid positions for each kind of information (see *Section 5.2 Zoned grids*).

right Indexes are well worth the considerable work it takes to compile them. If users don't know which section to start looking in for what they need, the index takes them straight there. Note that the page numbers in an index can follow straight on from each item. There is no need to line them up on the right (see *Indexing*, in PUBLISHING GUIDE, p. 17).

Easel display 373
Easicut trimmers 210
Eastham
   Box files 17
   Computer binders 89
   Data files 18
   Magazine files 18
Envelopes
   Classic 123
   Excel 56
   Manilla 78
   Wages 79
Erasers 23
Excel
   Box files 58
   Envelopes 56
   Fax rolls 54
   Photocopier paper 57

New publication
Better health for children
The principles of child health surveillance

Edited by **David M. Johnson,** Senior Lecturer in Child Health

This new book by a well-established expert lists the procedures that should be included in a programme of child health surveillance. The programme proposed can not only detect developmental problems and defects , but also emphasizes the role of activities such as accident prevention, health education, and developmental guidance. The book draws on the latest research, and is based on an extensive survey of current practice..

'An essential source for those wishing to implement child health surveillance in general practice.' **National Medical Journal**

160 pp 1991 0-45-231815-6 £6.50 Paper covers

above Catalogues usually contain complex information which needs careful typographic coding to help readers scan quickly for the information they need. Seven different tags are used in this item from a publishers catalogue: from the top, they are the flash, title, subtitle, authors, description, review quote, and bibliographic data (see *Using styles and tags to format text*, in PUBLISHING GUIDE, p. 10).

above In this catalogue, separate columns are used for product names, descriptions, technical data, and illustrations. Notice that the telephone number is on every page, so customers don't lose their place when ordering goods because they have had to turn elsewhere to find the number.

above This directory provides a clear contents list on the first page. Note the short editorial and the editor's photo. Catalogues and directories can seem dry and inaccessible without the human touch conveyed by even a small amount of editorial or marketing text.

If you have an optical scanner (see *scanning,* in GLOSSARY), you can scan in images yourself. The detail and quality will not be perfect (unless your images are large line drawings) but you will be able to size and position them on screen. If your document is to be professionally printed, you will get better quality reproduction of your images if the printer deals with the illustrations. This means specifying where each image is to appear, its size and shape, whether it is to be black and white, and so on. For guidance about scaling and cropping illustrations see *Reproducing pictures*, in PUBLISHING GUIDE, p. 13.

8.2 **Using illustrations**

Photographs or illustrations are often necessary to allow users to identify the products they need. Good images will help them understand the products too – they should be big enough to show any important detail. Size your illustrations in relation to the page grid you are using. However, don't be afraid to override the grid if you need the clarity of a bigger image.

9 Designing 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.

CPU prices (£)

	386	486
1mb RAM, 80mb HD	1799	2899
4mb RAM, 80mb HD	2199	3299
8mb RAM, 160mb HD	2599	3699
Extra 2mb RAM	200	200

above The horizontal space between cells is almost always greater than the vertical space. Readers often need horizontal rules to help them scan across rows, but may not need vertical rules to help them scan down columns.

Short heading	A longer multi-line heading	Short heading

above If some headings go on to more than one line, it is easiest to hang them all from the same point. Use a horizontal rule underneath so readers can see where the headings end and the data starts.

Tables can be one of the most difficult graphic design tasks. Most of the guidelines discussed so far apply: you'll need to set up typographic hierarchies for column and row headings, and you will need to use space and horizontal rules to make the structure of the information clear.

9.1 Typefaces

You will often need to use a smaller type size for tables than for your main text. If space is short try a condensed font such as Arial Condensed or Arial Light Condensed.

9.2 Rules

Vertical rules are not generally necessary in tables if the data in the columns is uniformly aligned. The space between columns will do the same job. If many cells are left blank, though, vertical lines might be needed to reinforce the columns.

Horizontal rules, on the other hand, are often needed to help the reader to scan across the table. By varying thicknesses of rules, different sections can be emphasized.

9.3 Column headings

Write short headings for columns, and use abbreviations where you can (but make sure the meaning is still clear). If column headings have to run over more than one line, align them at the top and use a horizontal rule below, to make a clear separation between the headings and the table contents below.

9.4 Estimating the width of columns

Every table is a separate design problem: each will have a different number of columns and perhaps different kinds of data in the cells. When the table is completed, the reader should see the columns as equally spaced, even if the content varies in width.

DTP allows you to try out ideas on screen and to quickly run out trial proofs on paper. (Remember to keep a copy of each version you try – you may want to go back to it.) Set your headings with tabs between, and then adjust the tabs until

right With such an imbalance between the column headings and the data in the table, it isn't possible to space the columns in this table evenly. You just have to do it by eye.

	seats	size	trade price	recommended retail price
Large table	8	1000 mm x 2000 mm	£150	£275
Small table	6	800 mm x 1500 mm	£105	£195

right Where figures have to align at the right, the column heading should align with the left edge of the longest cell in the column (see the third column from the left).

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

If a table won't fit on one page, you can split it – but be sure to repeat the headings and indicate in the title that it is a continuation.

all the headings fit on the page with equal space between them. When data is entered in the cells of the table, you'll need to make more spacing adjustments until there is a visual balance between the columns. You should print out your work before making a final decision because it will not look quite the same on the screen.

9.5 Aligning data with column headings

Where the cells contain text, they can line up on the left under the column heading. Where the cells contain figures that have to be aligned on the right, line them up with right tabs, or decimal tabs. Then adjust the tabs so that the left edge of the longest cell aligns with the left edge of the column heading.

9.6 Row headings

Make headings as short as you can. If a second line can't be avoided, indent it slightly, or at least make sure there is more space between each row heading than between the lines in a single heading.

right If row headings have to go on to a second line, indent them slightly so that readers can still scan down the left-hand side of the table without being confused by words which appear not to be in alphabetical order.

Horizontal rules help to clarify tables with multi-line row headings.

Pencil sharpener, small	S162	10	D	3.31
Pencil sharpener, double	S173	10	D	4.56
Pin bowl	S678	1	Q	2.04
Punch, paper, 2 hole	S298	1	Q	12.05
Punch, paper, 4 hole (suitable for No 3 type files)	S295	1	D	15.89
Reinforcement rings, self-adhesive	S193	500	D	0.35
Rule, Plastic, 12 inch	S648	25	Q	0.25
Scissors, general purpose	S972	1	D	2.98
Security tape dispenser	S400	1	Q	6.87
Security tape (blue)	S401	25	D	0.55

10 Legibility

Q Can I take out further cover
without undergoing a further
medical examination?

A Yes, we guarantee to extend cover
for you *and* your family so long as
you maintain your LifeSure policy

Q Can I take out further cover
without undergoing a further
medical examination?

A Yes, we guarantee to extend cover
for you *and* your family so long as
you maintain your LifeSure policy

above Avoid typefaces with unusual characters
which might distract from your message. The top
version is set in ITC Bookman; the bottom version
is in Amasis.

SHAPE

shape

above Because they have ascenders and
descenders, words in small letters have a more
distinctive outline than words in capitals.

Guidelines on legibility tend to concentrate on text designed for continuous reading. However, factors such as line length and leading (see *leading,* in GLOSSARY), which are vital in the context of, say, books, are less critical for short items like headings (where prominence and distinctiveness are the main concerns), or tables and forms (where economy of space is usually important). Amasis and Arial have been chosen so that when you need to use small sizes, the characters are still clear.

10.1 Capitals and small letters

The pattern of ascenders and descenders formed by small letters gives them a distinctive word shape, which helps the reader to recognize each word. For this reason, small letters are easier to read than capitals.

10.2 Type size

If you need to organize many different elements on each page, space is obviously important: it enables you to group related items together to show readers the structure of the information. Because of this need to leave as much space as possible around each block of type, it is rarely possible to design complex tables or forms using a type size as large as is normally recommended for continuous reading. Instead of 10 or 11 point, you might have to use 8 point type. Sometimes you may even have to use 6 or 7 point – for footnotes perhaps – but only if absolutely necessary. Obviously, this will not apply if you know your document will be read by a large proportion of people with eyesight problems. Bear in mind that you may run into problems with small type sizes if you use a medium-resolution output device such as a laser printer.

10.3 The space between lines

Leading should normally be between 15 and 30 per cent greater than the type size (for example, 10 point type on 12 point leading). The type specimens provided with this Design Guide show examples of type set with different

amounts of leading. Notice that the samples with leading equal to type size seem to be rather crowded, but the samples with more leading are easier to read.

The amount of leading you need is related to the length of your lines: longer lines need more leading for comfortable reading.

10.4 **Serifs versus sans serifs**

For complex typography, such as that in forms or catalogues, where text is broken into lots of discrete sections, sans serif type such as Arial is perfectly clear. For continuous reading, though, serifs give a strong horizontal emphasis to lines of type and many people prefer it (see *serif* and *sans serif*, in GLOSSARY). Arial and Amasis are both highly legible, and your choice for complex pages may not be dictated by legibility so much as the range of font variation that you need.

10.3 **Text alignment**

Ranged left
For most purposes ranged left text should be your first choice (see *ranged left*, in GLOSSARY). Unlike justified text (see *justified text*, in GLOSSARY), the same amount of space is put between words, resulting in an evenly spaced line. If you prefer it, you can hyphenate words to achieve a less ragged right edge to paragraphs.

Ranged right and centred
Ranged right text is useful for short row headings in tables or for questions on forms that align with a column of answer spaces. Centred text can be used for titles, and for column headings in tables, but don't use these alignments for continuous text.

Justified text
Justified text has straight left-hand and right-hand edges. It's achieved by varying the space between words. Used for continuous text, it can be perfectly legible (although no more legible than ranged left text), but you should be careful not to use it with very short line lengths. The default settings of many page make-up programs provide unacceptably wide word spacing and bad hyphenation at line endings (see *hyphenation*, in GLOSSARY). You should vary the settings and print out a series of tests until you obtain satisfactory justified text. Never use it for a form or other complex page.

Flat artwork copies from same original	£ 1.85
Duplicate slides from transparencies	£ 1.85
White on black reversal slides	£ 2.15
Stripping in logos, titles, etc	£ 2.80
Studio shots	£20.00

above The row headings in this table are ranged left. This is the safest option for most complex typesetting.

Flat artwork copies from same original	£ 1.85
Duplicate slides from transparencies	£ 1.85
White on black reversal slides	£ 2.15
Stripping in logos, titles, etc	£ 2.80
Studio shots	£20.00

above The row headings in this table are ranged right. This can work well if you need to relate row headings of different lengths to a column of data to the right.

Flat artwork copies from same original	£ 1.85
Duplicate slides from transparencies	£ 1.85
White on black reversal slides	£ 2.15
Stripping in logos, titles, etc	£ 2.80
Studio shots	£20.00

above The longer row headings in this table are justified. It has produced uneven and excessively wide word-spacing and should not be used for tables, lists, indexes, etc.

Monotype Desktop Solutions DESIGNING FORMS AND CATALOGUES

11 Quality matters

This Design Guide has focussed on what readers need – from the way that the structure of a text can reflect the tasks readers bring to it, to the size of type they can read comfortably. Readers of your documents will have their own preferences, and it is worth the effort to find out what these might be by trying out alternative layouts on other people.

11.1 Language and design working together

The Guide has discussed the language and structure of documents as well as their layout and use of type. This reflects the nature of complex documents. Design and language work together in several ways:

- You can make complex questions or sentences easier to understand by breaking them up and using different typeface variants for information of differing status (see the examples in *Section 7 Forms design*).

- You can use zoned grids so that information of the same kind always appears in a constant position on each page (see *Section 5 Grids)*.

- You can make short items like headings or questions easier to read by breaking lines at sense points. For example, compare these two line endings:

A great day out for all the family   **A great day out for all the family**

The second version is more effective as a heading because it separates out the two constituent ideas.

11.2 The penalties of bad design

Good design always brings rewards, whether you measure them in terms of a better image for your organization, increased sales, or simply personal satisfaction for the person responsible. Bad design, though, brings greater penalties for some kinds of documents than others. Your organization's efficiency can be seriously affected by badly designed forms, price lists, catalogues, or other functional documents. So the time it takes to design things well is time well spent.

R Reading list

There is no definitive publication on forms or catalogue design. The following publications contain useful research-based material:

Duffy, Thomas M., and Waller, Robert, (editors), *Designing usable texts*, New York, Academic Press, 1985.

Felker, Daniel B., (editor), *Document design: a review of relevant research,* Washington, American Institutes for Research, 1980.

Felker, Daniel B., Pickering, Frances, Charrow, Veda R., Holland, V. Melissa, and Redish, Janice C., *Guidelines for document designers*, Washington, American Institutes for Research, 1981.

Sless, David, *Name and address please,* Canberra, Department of Administrative Services, Information Co-ordination Branch, 1985.

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

Wright, Patricia, 'Informed design for forms', *Information design journal,* Vol. 2, 1981, pp. 151–178.

These 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.