

8

Designing User-Friendly Documents



LEARNING OBJECTIVES FOR THIS CHAPTER

- Understand the importance of document design
- Identify and create well-designed documents
- Use design elements for consistency and coherence
- Use design elements for navigation and emphasis

CHAPTER OUTLINE

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design, the layout of words and graphics, determines the look of a document. Whether hard copy or digital, well-designed pages invite readers in, guide them through the material, and help them understand and remember the information.

This chapter provides principles and guidelines that are generally applicable across many media types (print, digital). See Chapter 19 for more on blogs, wikis, and Web pages.

THE IMPORTANCE OF USER-FRIENDLY DOCUMENT DESIGN

Design affects a document's usability

Like all decisions about technical communication, document design consists of a series of informed choices. You need to decide about fonts, typography, white space, and other visual elements, based on the document's audience and purpose. These decisions affect the usability of the document.

Imagine that you are asked to produce a heart surgery brochure for a hospital. The brochure's intended audience consists of patients who have a particular heart condition and may need to undergo a specific type of heart surgery. The brochure's purpose is to explain the procedure, answer frequently asked questions, and review the risks—while reassuring patients.

Begin by analyzing your audience and purpose

Before you would even begin to think about what to write or how to design the document, you would need to do an audience and purpose analysis (see Chapter 3). If the brochure also needed to include a list of tasks, such as a checklist of actions patients must take, you might also conduct a task analysis (explained in Chapter 3). Your analysis would yield much important information. For example, you are likely to determine the following as the most important outcomes for the document:

Determine your document's usability requirements by doing a task analysis

1. To reassure fearful patients that the surgery is safe and that the recovery rate is quicker than that of many other types of heart surgery.
2. To ensure that readers are able to understand what they need to do before, during, and after the surgery.
3. To make certain that older patients—who make up the largest population of candidates for this surgery and who sometimes have poor eyesight—are able to read the document.

Design the document to meet reader needs

To reassure fearful patients, you could choose a comforting typeface, a warm color scheme, and plenty of white space to give the brochure an unimposing look. To ensure that patients understand the steps involved you could use numbered and bulleted lists to break up and simplify the various procedures. To make the document more readable for older patients, you could use a large font size. To make the document accessible to as many readers as possible, you could design print copies for a doctor's waiting room and a PDF version for the Web site.

Document design, like all aspects of technical communication, puts audience and purpose first.

CHARACTERISTICS OF WELL-DESIGNED DOCUMENTS

Readers appreciate documents that are well designed because such documents make it easy and pleasant for people to access and use the information they need. Well-designed documents typically have four characteristics: they are inviting and accessible; they flow well as a single, cohesive unit; they provide a visual hierarchy, displaying information in the right order; they address a diversity of readers. Figure 8.1 does not meet those requirements, while Figure 8.2 (a revision of the same document) does.

People generally read technical documents only because they have to. They may pick up a document because they need information, as in the heart surgery brochure described above, or they may be presented with a document they

Four audience expectations of a document's design

Readers expect an inviting and accessible design

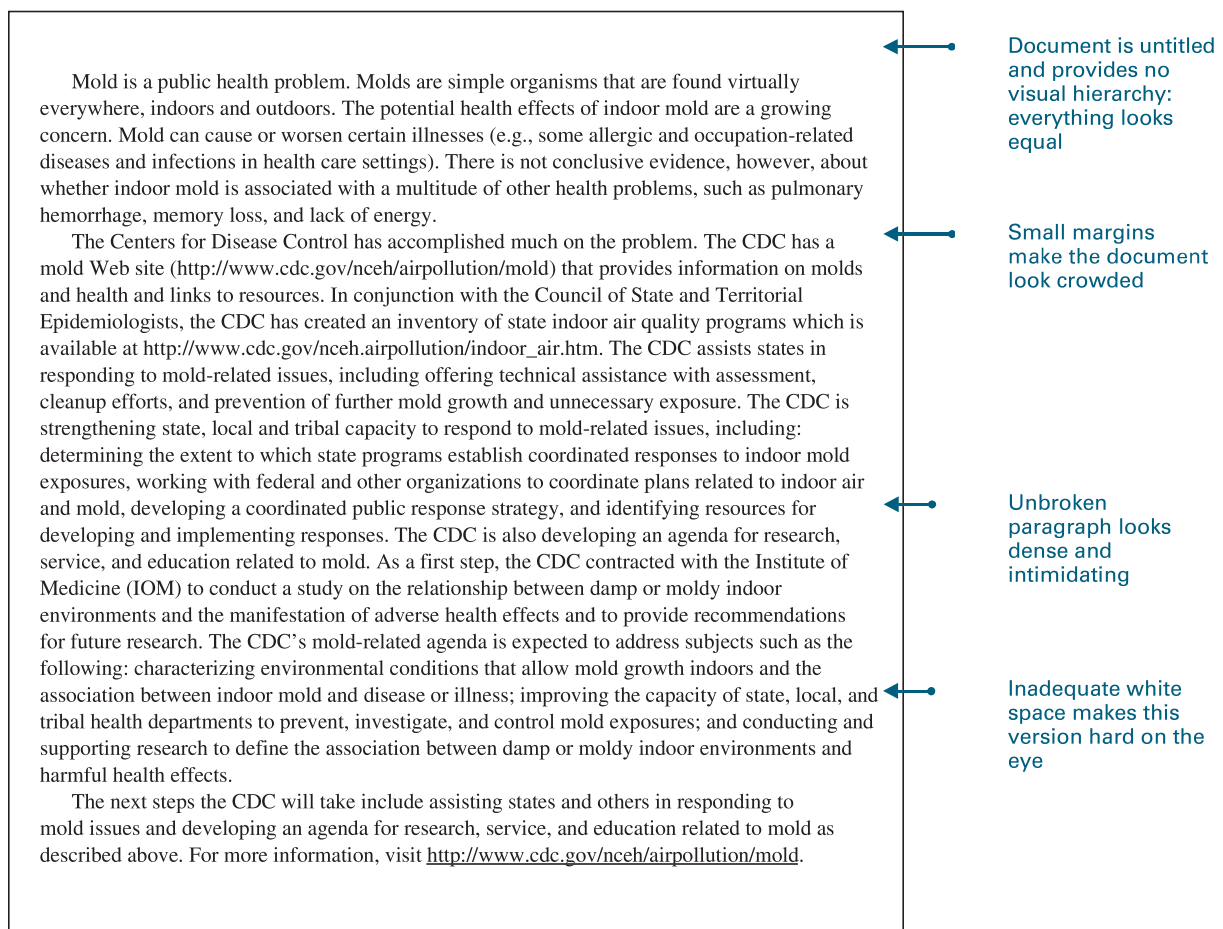
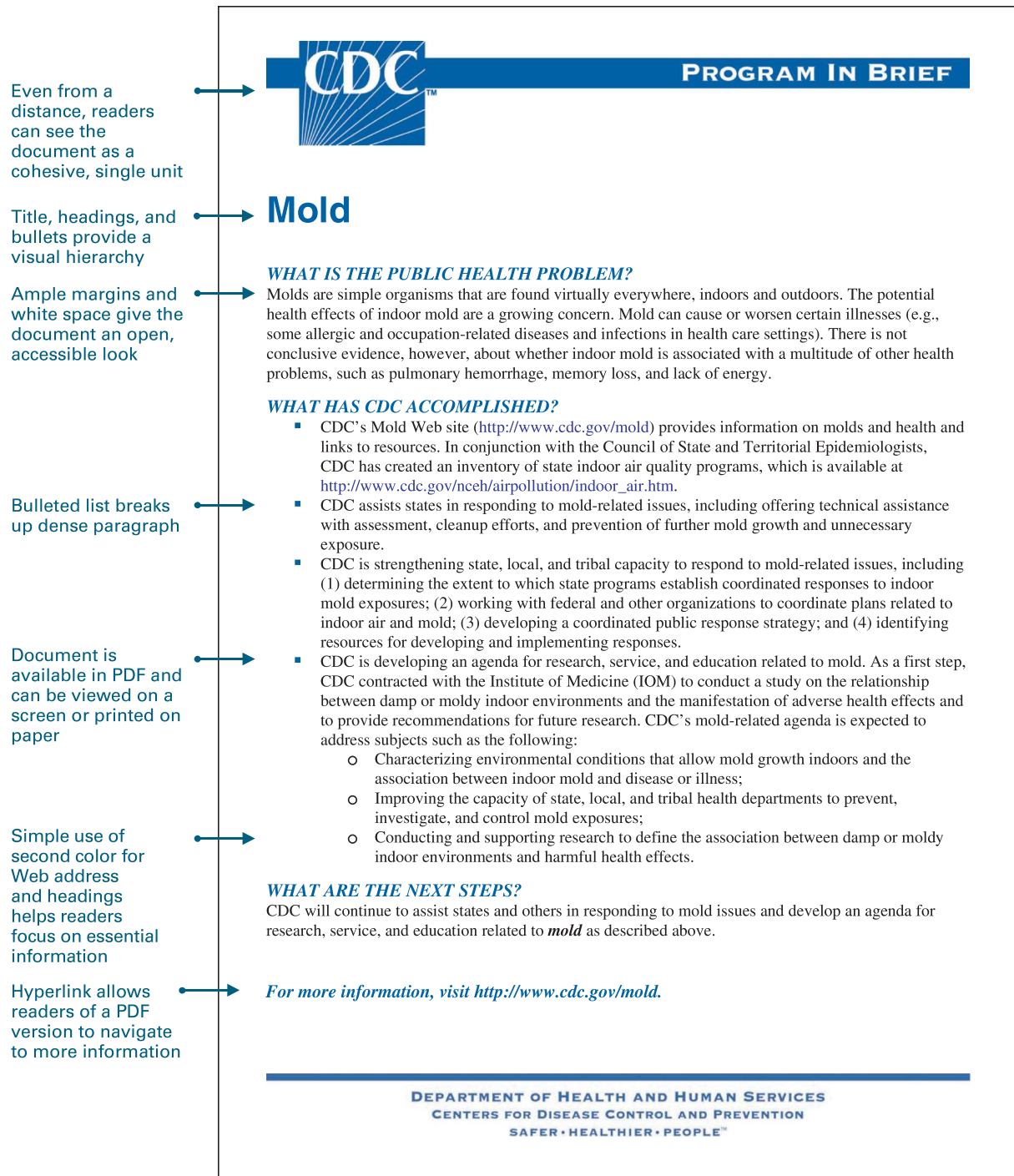


FIGURE 8.1 Ineffective page design

**FIGURE 8.2** Effective redesign of Figure 8.1

Source: Centers for Disease Control and Prevention.

are required to read for work. Either way, readers will resist a document that is intimidating or hard to read and will try to get the information in some other way (e.g., going online to find a more straightforward presentation or asking a colleague or the writer for clarification).

Various types of software can help with document design, but all the software in the world won't help unless writers understand basic principles of visual appeal and accessibility.

Notice how Figure 8.1 presents a barrage of information with absolutely no design elements, making the information needlessly intimidating, unappealing, and hard to grasp. In contrast, Figure 8.2 uses a clear title, margins, white space, bullets, headings, and color to present the same information in a much more open, inviting, and accessible manner.

Generally, readers view a document first as a whole unit, scanning the page quickly to get a sense of the overall layout. Even from a distance, without being able to read the text, readers should be able to answer the question "How is this document structured?" Design elements help readers answer that question.

Readers appreciate a design that works as a single, cohesive unit

Consider how Figure 8.1 tells readers nothing about how the document works as a unit—it is simply a page full of text. Figure 8.2, on the other hand, has a purpose (as indicated by a title), moves from point A to point B (as indicated by the headings), and presents a list of specific facts (as indicated by the bullets).

Readers also expect the document to highlight the most important information. In other words, they expect the document's design to help them determine the *visual hierarchy* of the information, displayed primarily through the level and design of the headings and the inclusion of numbered or bulleted lists.

Readers appreciate a design that forms a visual hierarchy

Notice how Figure 8.1 provides no visual hierarchy. It simply offers a series of paragraphs, each seemingly offering information of equal importance. In contrast, Figure 8.2 offers a clear hierarchy of information. All three headed sections are of equal importance, and so the headers are designed identically (same font, font size, and color). The bulleted items fall into two levels of detail: general and specific (the more specific bulleted items are indented further in a different style of bullet).

A document's design can also affect its multicultural appeal. For instance, a certain color might be interpreted differently by different readers. As a rule, use subtle and varied colors, standard fonts and font sizes, and appropriate white space.

Readers appreciate a design that takes a wide range of people into account

SPECIFIC DESIGN ELEMENTS

The elements of document design comprise two categories: those that give a document a consistent and cohesive look and those that aid navigation and add emphasis. No design elements should be merely decorative; all should enhance the reader's orientation and understanding.

Designing for Consistency and Cohesiveness

Elements that provide consistency and cohesiveness include grid patterns, margins, paragraphs, justification, white space, line spacing and indentation, font style, and font size. Each element is described below and summarized in the Strategies on pages 139–140.

Grid Patterns. Grid patterns help readers make sense of a document as a single unit because they create an underlying structure throughout the document. Figure 8.3 shows a sampling of grid patterns. Most documents follow a standard horizontal grid pattern, as, for example, a memo or letter. A vertical grid is commonly used in manuals, brochures, or newsletters. In rare cases, you may want to use a combined grid pattern.

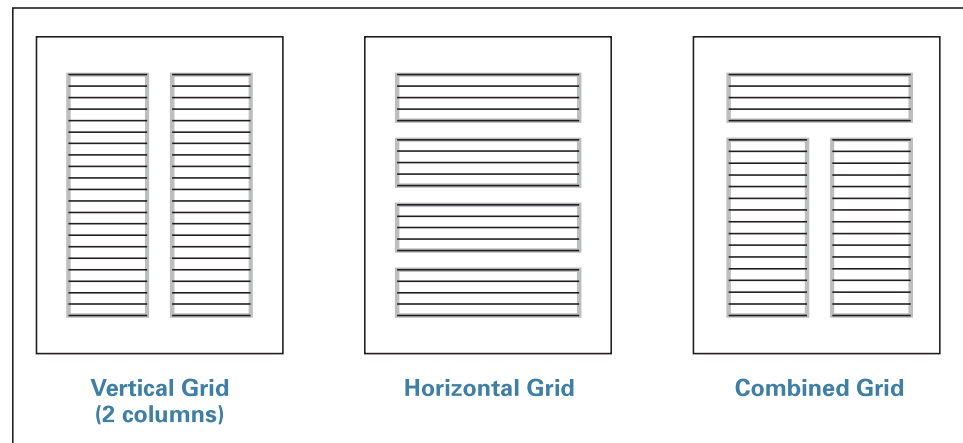


FIGURE 8.3 Grid patterns

Margins. Consistent margins give the document a unified appearance. Margins must not only be the same width throughout a document but also wide enough. Narrow margins crowd the page and make the material look harder than it probably is. On your 8½-by-11-inch page, provide margins of at least 1 or 1½ inches on each side, as well as at the top and bottom, of every page. If the manuscript is to be bound in a cover, increase the left (inside) margin to 2 inches.

Paragraphs. Whereas ordering information within paragraphs (as discussed in Chapter 5) affects a document's overall structure, the shape of each paragraph serves a design function. Use a long paragraph (but try to keep it to 15 lines or less) for clustering material that is closely related or best understood in one block; use short paragraphs for making complex material more digestible (as in step-by-step instructions or for emphasizing vital information). At the same time, try to vary

the lengths of your paragraphs. Readers are likely to resist a document that consists primarily of long or short paragraphs only. Also, avoid “orphans” (one line of a paragraph at the bottom of a page) and “widows” (one line of a paragraph at the top of a page).

Justification. Text is always automatically flush left (lined up evenly along the left margin). However, along the right margin, you have a choice between *justified* text (even right margins) or *unjustified* text (uneven or “ragged” right margins). Each arrangement creates its own feel.

In justified text, blocks of text look clean and even on either side, but spacing varies between words and letters on a line, and you may need to frequently hyphenate words. Justified text is generally used in books, annual reports, and other formal materials. In unjustified text, text is ragged on the right side of text blocks, but spacing between words and letters on a line is even, and you can avoid overuse of hyphenation. Unjustified text is appropriate for more personal forms of communication, such as letters, memos, and in-house reports. Whichever justification you choose be consistent throughout the document. Figure 8.4 illustrates justified and unjustified text.

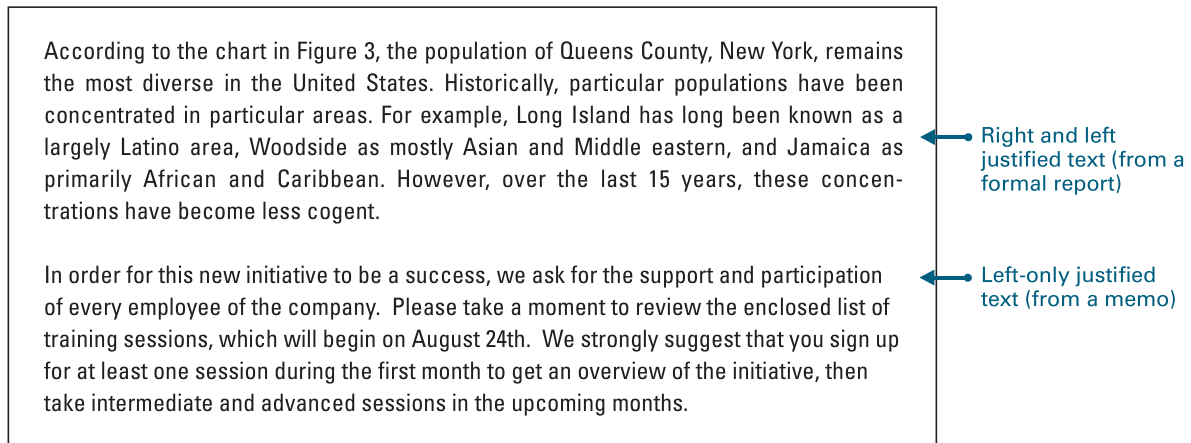
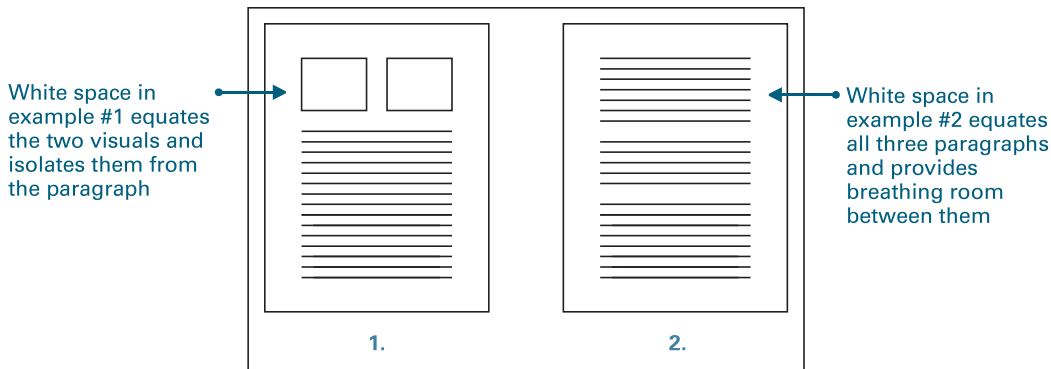


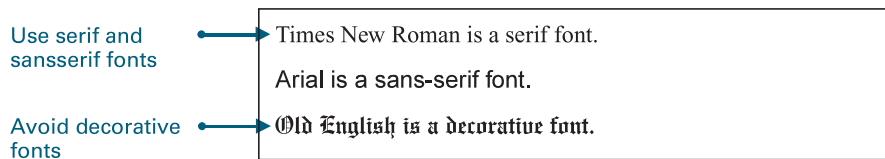
FIGURE 8.4 Justified and unjustified text

White Space. Sometimes, it’s what’s *not* on the page that makes a difference. Whereas margins are the empty spaces along the left, right, top, and bottom of a document, white space is any empty space surrounding figures and tables, between columns, and between paragraphs. Areas of text or visuals surrounded by appropriate white space draw the reader’s eye to those areas. Well-designed white space is used evenly throughout an entire document, orienting readers by keeping related elements together, isolating and emphasizing important elements, and providing breathing room between blocks of information, as in Figure 8.5.

**FIGURE 8.5** White space

Line Spacing and Indentation. Always be consistent about line spacing. In most technical documents, use double spacing for ease of reading. When inserting a long quotation, indent the quotation, use single spacing within the quotation only, then return to double spacing for regular text. Also be consistent about indentation. As a general rule, indent each paragraph unless you insert an extra line space between paragraphs.

Font Style. Font style refers to the typeface used and the personality that each typeface conveys. Fonts fall into several categories: *Serif* fonts (such as Times New Roman and Palatino) include serifs, or fine lines that extend horizontally from the main strokes of a letter. Serif fonts are generally considered more formal. *Sans-serif* fonts (such as Helvetica and Arial) do not include these fine lines (“sans” is French for “without”). They tend to look professional without being quite as formal as serif fonts and are appropriate for most other types of technical documents. *Decorative fonts* are often used in advertising and marketing but should be avoided in technical documents. Figure 8.6 shows the differences between these font styles. Pick an appropriate font and stick with it throughout a document. For headings, you might select a different font (and a larger size), but use those heading fonts consistently as well.

**FIGURE 8.6** Sample font styles

Italics, **boldface**, and ALL CAPS are another element of font style you need to consider. Sometimes people use italics much as they would use a highlighter or marker, to set words apart and draw attention to these words. But excessive use of italics can make it hard for your audience to decide which information is truly

important. The same is true for boldface: Too much bold will lose its appeal. Bold is good for headings, subheadings, or terms or concepts in a sentence that you want to emphasize. Within text, use bold selectively. Use all-capital letters for a few words only or when creating short headings. Long strings of capital (uppercase) letters and words are hard to read.

Font Size. Use font sizes that are easy to read. Standard guidelines suggest using between a 10-point and 12-point font size for the text of most documents (usually erring to the side of 12-point). Use a 2-point-larger font for each level of headings (see page 140). Most important, be consistent throughout the document.



STRATEGIES for Designing: Consistency and Cohesiveness

GRID PATTERNS

- ▶ **Select an appropriate grid pattern.** Use a horizontal grid pattern for most basic documents (memos, letters, reports). Use a vertical grid pattern for specialized documents (manuals, brochures, and newsletters). Use a combined pattern rarely.
- ▶ **Use the same grid pattern throughout the document.**

MARGINS

- ▶ **Use adequate margins.** Use a 1-inch to 1½-inch margin along the top, bottom, left, and right of the page. For bound documents, use a 2-inch inside margin.
- ▶ **Use the same margins throughout the document.**

PARAGRAPHS

- ▶ **Vary the length of paragraphs.** Use long and short paragraphs as appropriate to keep blocks of related text together.
- ▶ **Avoid orphans and widows.** Add extra space to bump orphans to the next page, and reduce space (or shorten paragraph content) to pull widows to the previous page.

JUSTIFICATION

- ▶ **Determine if your text will be justified on one or both margins.** Use justified left and right for formal documents, and use left-only justified (ragged right margin) for less formal documents (memos, letters, in-house reports, and so on).
- ▶ **Use the same justification throughout the document.**

WHITE SPACE

- ▶ **Use plenty of white space.** Use white space between paragraphs and/or columns and around visuals, when appropriate.



STRATEGIES *continued*

- ▶ **Use white space consistently.** If you include white space between paragraphs or columns, use the same amount throughout the document. Include the same amount of white space around each visual in the document.

LINE SPACING AND INDENTATION

- ▶ **Decide how you want to use line spacing and indentation.** Use single, double, or other (for instance, 1½) line spacing. Indent all paragraphs or none.
- ▶ **Stick with your original plan.** Don't vary the line spacing or paragraph indentation. Be consistent.

FONT STYLE

- ▶ **Use either a serif or sans-serif font.** Prefer a serif font for formal reports and a sans-serif font for most other documents.
- ▶ **Decide which serif or sans-serif font to use.** Some of the most popular serif fonts are Times New Roman and Times. The most popular sans-serif font is Helvetica.
- ▶ **Stay with the same font throughout.** You might choose a different font for any headings in your document.
- ▶ **Use italics, boldface, and ALL CAPS selectively and sparingly.**

FONT SIZE

- ▶ **Use a standard font size.** Generally, a 10-point to 12-point size (depending on the font style) should be used for text and a slightly larger size for each level of heading.
- ▶ **Use a consistent font size.** Stay with the font size you've chosen for each element (text, headings, notes) throughout the document.

Designing for Navigation and Emphasis

Elements that aid navigation and add emphasis include headings; color, shading, boldface, italic, and underlining; bulleted and numbered lists; running heads and feet; and tables of contents and indexes.

Headings. Headings not only help chunk information into easily digestible parts (structure, see Chapter 5) but also guide readers through a page and signal the relative importance of topics. Readers often will move back and forth in a document, searching for the sections that seem most relevant, or they will scan only the main

headings, skipping the lower-level headings. To help readers navigate, design your headings consistently.

Headings generally break down into A-level (major headings), B-level (secondary headings, which always fall beneath A-level headings), and C-level (minor headings, which always fall beneath B-level headings). Each higher level of heading should encompass at least two heads at the next lower level. Lower levels of headings (D-level, etc.) make a document appear hard to navigate. Use bulleted or numbered lists instead.

Always use the same font style, size, and color at each level. Avoid orphans (headings that stand alone at the bottom of a page without any text beneath them). Notice how the headings are set up in Figure 8.2 (page 134). The A-level heading (“Mold”) uses a bold font, larger than the other fonts. B-level heads are in all caps and boldface and italics, set above each paragraph. Instead of using headings, C-level entries use bullets and are indented. These C-level entries could also be set up as actual headings by creating a short title for each and using boldface along with the bullets and indentations.

Levels and design of headings

Color, Shading, Boldface, Italic, and Underlining. Color can help readers move through the text and can draw attention to particular areas. For example, you can use color for headings, tabs, sidebars, callouts (labels that identify parts of a figure), and leader lines (dotted, dashed, or solid lines that connect labels with their objects), as in Figure 8.7. To highlight important information, you can use color for screens, horizontal and vertical rules, type, cross-references, and ruled boxes, as in Figure 8.8.

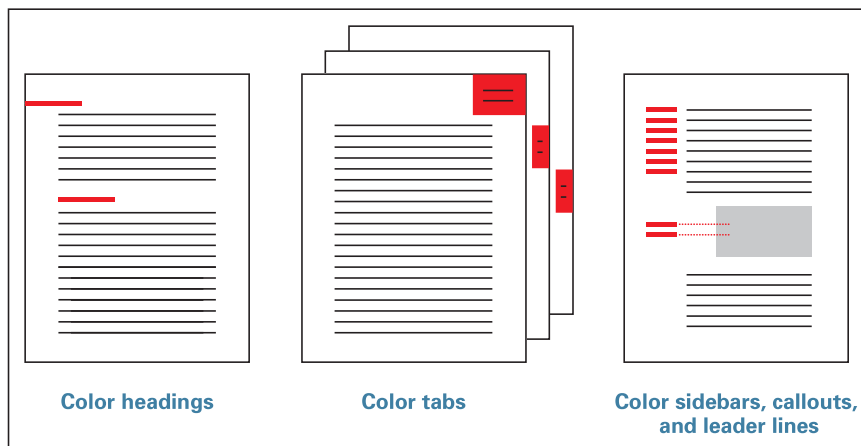


FIGURE 8.7 Using color for navigation

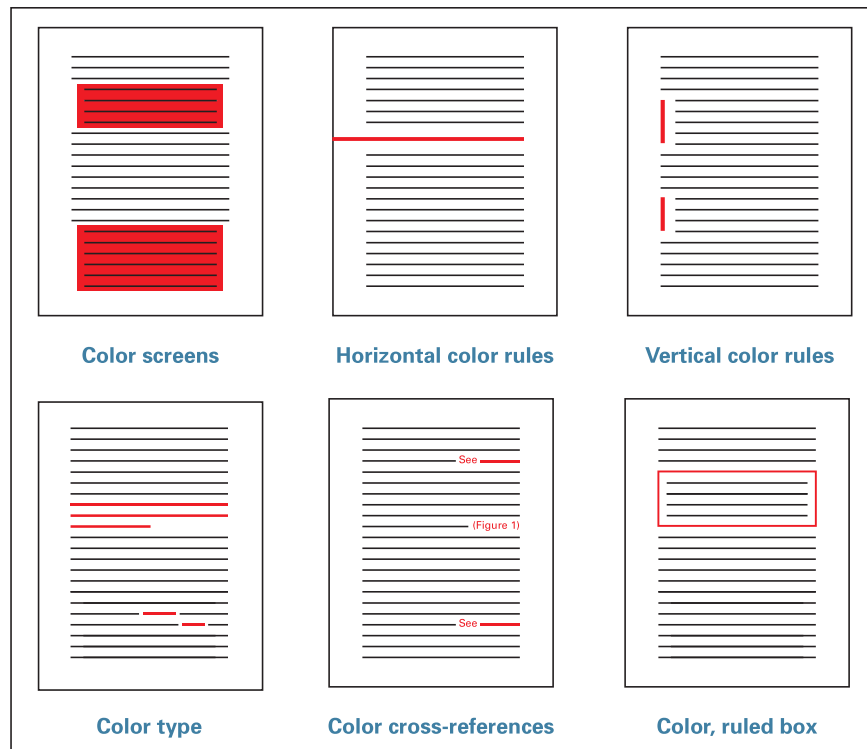


FIGURE 8.8 Using color for emphasis

Use color sparingly and use colors that aren't overly bright, that don't obscure the text they cover, and that contrast well with black print. You may also use shading, bold, italic, or underlining.

Bulleted and Numbered Lists. Whenever you include a series of similar or step-by-step items within a sentence or paragraph, consider using a bulleted or numbered list. Bulleted and numbered lists help readers navigate through dense information and emphasize the information by separating it from the text. However, don't overuse; don't use fancy icons when a plain round dot will do; and don't confuse the functions of bulleted and numbered lists. Bullets separate and highlight equally weighted items. Numbers enumerate the fixed sequence of steps in a process. Figure 8.9 compares in-text lists to bulleted and numbered lists. (For more on using lists, see Appendix B.)

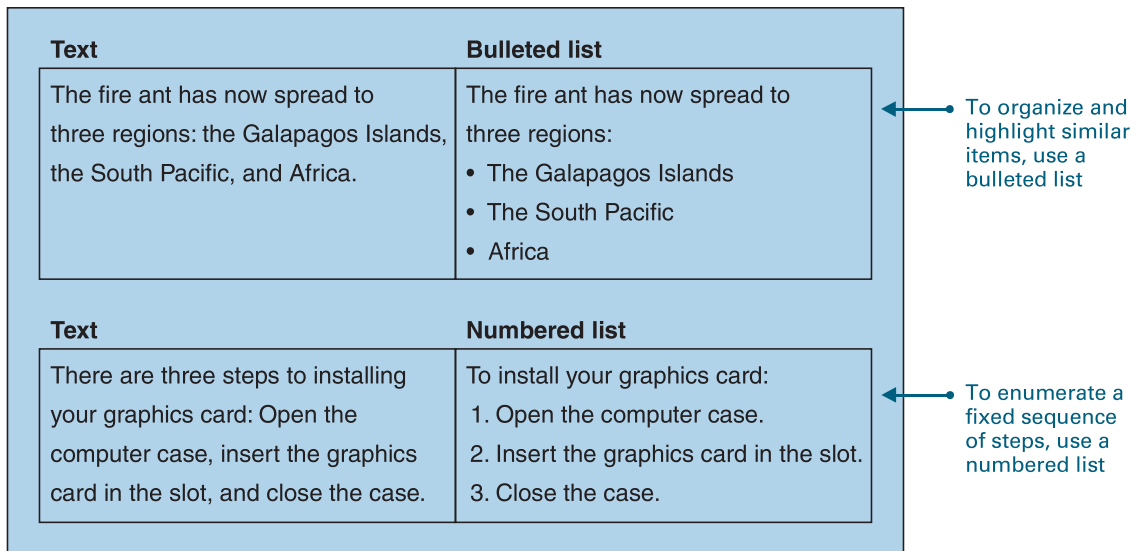


FIGURE 8.9 Bulleted versus numbered lists

Running Headers and Footers. Running heads and feet in longer printed documents help readers find material. They also help readers stay oriented to their location in the document. Typically a running head includes section- or chapter-specific information (as in this book) and running feet are reserved for book titles. However, page numbers may be included either in a running head or running foot. In a document with single-sided pages, running heads or feet should be placed consistently, typically flush right. In a document with double-sided pages, the running heads or feet should appear flush left on left-hand pages and flush right on right-hand pages, as in Figure 8.10.

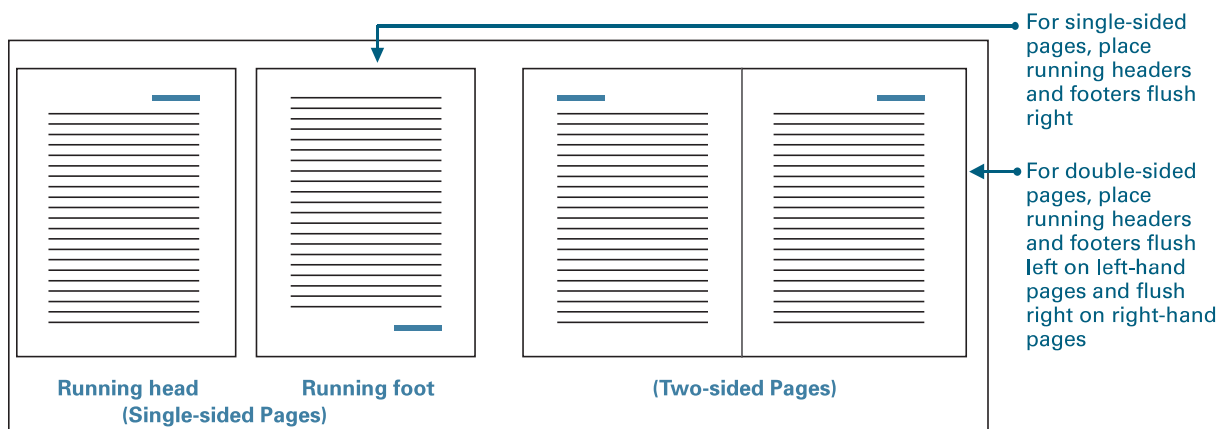


FIGURE 8.10 Running heads and feet

Tables of Contents and Indexes. In a longer document a table of contents and an index help readers find the information they need. In addition, the table of contents signals the relationship between topics and subtopics. Make sure your table of contents matches the heading structure of your document exactly.

Most of us have had the frustrating experience of trying to look something up in an index and discovering that the term we use is not the term the index uses. A successful index depends on knowing what categories, terms, and topics your readers are likely to look up when searching for what they need. For longer, more complex documents, consider hiring a professional indexer.



STRATEGIES for Designing: Navigation and Emphasis

HEADINGS

- ▶ **Design headings consistently.** Always use the same font style, size, and color for the same level of headings. A-level headings are typically in all caps, boldface, and rest above paragraphs; B-level headings are usually in initial caps, boldface, and rest above paragraphs; and C-level heads are typically in initial caps, boldface, and run into paragraphs (whether or not the paragraphs are indented).
- ▶ **Divide headings logically.** Make each higher level head yield at least two heads at the next level. B-level headings always fall within A-level headed sections, and C-level headings always fall within B-level headed sections.
- ▶ **Avoid excessive headings.** Try to avoid D-level headings and never move to a level beyond that.
- ▶ **Avoid orphans.** If a heading stands alone at the bottom of a page, without at least two lines of text beneath, add more space to bump the heading to the next page.

COLOR, SHADING, BOLDFACE, ITALIC, AND UNDERLINING

- ▶ **Use color as needed.** Use color headings, tabs, sidebars, callouts, and leader lines (page 141) for navigation. Use color screens, horizontal/vertical rules, type, crossreferences, and ruled boxes for emphasis.
- ▶ **Use color sparingly.** Color should not overpower the document and should complement, not obstruct, the text.
- ▶ **Use shading, bold, italic, and underlining.** If color is unavailable or you prefer to aid navigation and provide emphasis in other ways, use these design options.

BULLETED AND NUMBERED LISTS

- ▶ **Use bulleted and numbered lists appropriately.** Bulleted lists show a series of similar items, while numbered lists show a sequence of step-by-step items.
- ▶ **Don't overuse lists.** Otherwise, your document might look like a shopping list.



STRATEGIES *continued*

RUNNING HEADS AND FEET

- ▶ **Decide if running feet are necessary.** Usually, running feet are used only for full-length books, though you may use them in documents to place page numbers.
- ▶ **Always include page numbers.** Whether you put them in running heads or running feet, page numbers are essential. For a long document, count your title page as page i, without numbering it, and number all front matter pages, including the table of contents and abstract, with lowercase roman numerals (ii, iii, iv). Number the first and subsequent text pages with arabic numerals (1, 2, 3).
- ▶ **Include section- or chapter-specific information in running heads.**
- ▶ **Format running heads and feet correctly.** See Figure 8.10.

TABLES OF CONTENTS AND INDEXES

- ▶ **Use tables of contents and indexes for longer documents.**
- ▶ **Make sure tables of contents match document headers exactly.**
- ▶ **Use standard index categories and topics.** Try to accurately anticipate which terms readers will look up in searching for what they need.

CHECKLIST
for Document Design

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CONSISTENCY AND COHESIVENESS

- ☐ Does my grid structure provide a consistent visual theme?
- ☐ Are margins ample?
- ☐ Is each paragraph tailored to suit its purpose?
- ☐ Is the document's right margin unjustified?
- ☐ Does the white space create areas of emphasis?
- ☐ Is the document's line spacing and indentation effective?
- ☐ Have I chosen readable and appropriate font sizes and styles?
- ☐ In general, have I used versions of a single typeface throughout?
- ☐ If different typefaces *are* used, are they used consistently?
- ☐ Have I used *italics*, **boldface**, and ALL CAPS sparingly?



CHECKLIST *continued***NAVIGATION AND EMPHASIS**

- ☐ Do headings clearly announce the document's large and small segments?
- ☐ Are headings sized to reflect their specific level in the document?
- ☐ Are headings visually consistent and grammatically parallel?
- ☐ Have I formatted a series of parallel items as a list (numbered or bulleted, as appropriate)?
- ☐ Do running headers and footers announce sections of the document?
- ☐ Have I used page numbers appropriately?
- ☐ Are the table of contents and the index complete and easy to navigate?

**APPLICATIONS****GENERAL APPLICATION**

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With a partner, find two printed documents: one that demonstrates good use of design elements and another that demonstrates confusing or inconsistent use. Imagine that you and your partner are a team of technical communication consultants. Write a memo to the manager of the organization that produced the effective document, explaining its positive features. Write a memo to the manager of the organization that produced the confusing document, making suggestions for improvement.

TEAM APPLICATION

Working in teams of three or four people, find a document that is intended to answer a question—a patient brochure about an illness or medical procedure, a reference guide for new students on campus, or a personnel document from your company, for example. Your team's goal is to redesign the document so that it uses an appropriate grid design, makes effective use of white space, and uses formatting, fonts, headings, and other page design elements consistently and clearly.

Appoint one member of your group to serve as editor. The editor is responsible for making sure the design elements are used consistently throughout the redesigned document. Ask each team member to work on one section of the document. Assemble all the redesigned sections, and ask your editor to review the materials. The editor should check your work against the Checklist for Document Design.

GLOBAL APPLICATION

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Find a document that presents the same information in several languages (assembly instructions for various products are often written in two or three languages, for example). Evaluate the design decisions made in these documents. For example, are the different languages presented side by side or in different sections? Write a memo to classmates and your instructor evaluating the document and making recommendations for improvement.

DIGITAL AND SOCIAL MEDIA APPLICATION

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Technical documents are often created using preformatted templates, which are readily available in Microsoft Word, Apple Pages, and other word processing programs. Templates allow you to create sophisticated, attractive documents quickly and easily. But this ease of use can restrict your options to change or customize a design for a specific audience and purpose. In groups of two, consider the heart surgery brochure described on the first page of this chapter. Find a few brochure templates and compare your findings to the design principles presented in the Strategies boxes (pages 139–140 and 144). What are the pros and cons of using a template for this situation? How much are you able to manipulate the template's settings? For example, can you change an all caps heading to upper- and lower-case? Can you change the colors?

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