Monotype Desktop Solutions

Designing reports and presentations

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Monotype

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Contents

Thinking about your readers

The type specimens will tell you more about Photina and News Gothic: their history, their special features, and examples of the typefaces in use.

Photina

Photina is a seriffed typeface. It is a good text face and looks good in large sizes, for headings and presentations.

News Gothic

News Gothic is a sans serif typeface. You can use it alongside Photina for captions, tables, and headings.

1.1 The goal: clear communication

The aim of this Design Guide is to help you make the best use of Photina and Monotype News Gothic to produce effective reports and presentations.

When you design any document it's important to think about who your audience is. This Design Guide is aimed at people who work in business, government, or other organizations; or anybody who reports information to others in a way that needs to both communicate and impress. You are probably producing:

- reports on projects, market research, product assessments or other work
- proposals to customers or colleagues designed to persuade them to buy a product or to fund a project
- presentations to customers or colleagues, using slides or presentation software on your personal computer.

right It's more important that a report be easy to read and easy to scan than that it uses all the features that DTP software offers.

Problems with the example on the left include: line length too long, headings 'floating' above their relevant sections of text, and clumsy use of outline shadow type.

far right Less crowded pages (and clearer presentation slides) are usually worth the extra space they may demand.

1.2 **The purpose of typography**

Desktop publishing (DTP) allows you to use numerous typefaces, in different styles and sizes, but you don't have to use them all at once. Use special effects for your party invitations, but professional reports or presentations need restraint. Remember, you want your *words* to have the impact, not the type face you've used to set them in. When DTP first arrived, people enjoyed experimenting with all the typographic wizardry at their disposal. However, now most have discovered that the purpose of typography is to make life easier for the people reading their documents. You don't have to use lots of typefaces to impress your audience.

In the case of professional reports and proposals, the highest compliment for your design is if no one notices it at first: it means there was nothing to distract your readers from its real purpose of getting a message across.

Good typography is good manners: making the type legible, making the headings easy to spot, making the tables easy to read. In short, being considerate to your readers.

1.3 **Your readers**

Considerate design means thinking through everything you do from the readers' point of view:

- Readers have *expectations* about what reports and presentations are, and how they are structured. So you need to be aware of the basic conventions (see *Section 2 Reports and proposals* and *Section 3 Presentations*).
- Readers have their own *purposes* and *tasks*. You can't force them to read in the order you want, but instead you can make the text accessible and adaptable (see *Section 7 Making information accessible*).
- There are also certain principles of human *perception* which affect the way your readers see graphic structures in your document (see *Section 9 Perceptual problems and opportunities*).

2 Reports and proposals

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

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

For shorthand the word 'report' is used here to cover them all.

Most readers of a report want to do three things:

- find out quickly what it's about, using the report's *access structure*
- read some or all of the *content*
- make a *decision* or take some action as a result of reading the report.

2.1 Access structure

This refers to the contents list, headings, and other things that help people find out what your report is about. Try to treat all these elements as part of a single 'access structure' – so they work together to make sense to someone flicking through the report (see *Section 7 Making information accessible*). Notice how the contents page and headings have been designed to help you access information in this booklet.

Contents

2.2 **Content**

This is what people look at when they read a report or proposal carefully, to get detailed information. The core of your report will normally be text so use clear, readable type with generous margins for readers to make notes in (see *Section 5 Making type legible*). You may also need tables (see *Section 10 Designing tables*) and illustrations (see *Section 11 Graphs and charts*). Each kind of report has conventions of its own, and some have standard section titles specified by whoever you're addressing your report or proposal to. There isn't room to discuss them all here, but you'll find more information in a good book on business communication (see *Reading list*).

2.3 **Decision points**

To help people to act on your report or proposal, make sure they know exactly what their options are. This means highlighting your recommendations or main findings as you go along, and including a summary. And it may mean using a table to show alternatives, or a flow chart to show a sequence of actions (see *Section 8 How design can make your message clearer*). You'll also want to give contact names and addresses as you go.

You should refer to the PUBLISHING GUIDE for advice on planning and seeing your document through to production.

Training needs

It is clear that our competitors are spending significantly more on training than we are. The difficulty of recruiting skilled staff is likely to be a significant barrier to our future growth.

Recommendation We recommend the immediate appointment of a Training Manager. His or her first task should be to assess our training needs in detail and liaise with local colleges and other providers.

left In this example, the recommendations in the margin, with bold headings, enable readers to see quickly what action the report is calling for.

3 Presentations

3.1 **Presentation templates**

For a typical presentation you will need 35mm slides or overheads, lecture notes for the speaker, and handouts for the audience. A presentation program allows you to produce all these visual support materials in an integrated way. You write the presentation script using the program's outliner and then apply design templates to the outline. You can sort your slides, and produce all the materials you need for an effective presentation. The process is similar to applying styles in DTP software (see *Section 2 Planning,* in PUBLISHING GUIDE).

Most programs provide you with pre-designed templates. Some are quite elaborate and difficult to use well. Pre-designed templates also have the disadvantage that they are immediately recognizable by people who have bought the same software. Use the simplest templates on offer and customize them by using your new Photina and News Gothic fonts, and by choosing your own colours.

3.2 **Colour**

Colour is largely a matter of taste, but there are some legibility problems to watch out for. You will be safe with almost any colour on a white or black background, as long as there is enough contrast. Be careful of using two colours with similar tonal values. It is a good idea to make laser-printed proofs in black and white – if the colours come out as the same shade of grey, then don't use them together. Certain colour combinations are known to cause perceptual problems. Red and green used together will cause problems for a large number of people who have defective colour vision. And avoid combining bright shades of blue and red: they are difficult to see clearly because the eye will focus on the red at the expense of the blue.

3.3 **Format**

If your presentation might be delivered in several different media (via the computer screen, via 35 mm slides, or via overheads) you should stick to a wide format rather than a tall one. Even where a tall format is feasible (for example, on overheads) the wide format is a good constraint: because it is not so deep it stops you making too many points on one slide. In fact a wide format is now generally accepted as standard.

3.4 **Legibility**

The legibility of slides is critical, but obviously you have to apply different standards from those which you would apply to paper documents. The important thing is the size the image appears to the viewer. You can check the relative size of the image you have made by using the speaker notes facility, which gives you a thumbnail picture of the slide. A useful rule of thumb is to have no more than nine words per line. Of course, the final size of the image depends on the screen, its distance from the audience, and the distance of projection equipment from the screen. If the presentation is on your home territory you can make sure everything's just right, but if you're preparing a presentation to take somewhere else you should err on the side of caution – it's common to find that the screen is too small. In any event, do a trial run well in advance to pick up any obvious problems.

For your main points you shouldn't use type smaller than 18 point when preparing your slides. For figures on charts or captions, 14 point should be a minimum.
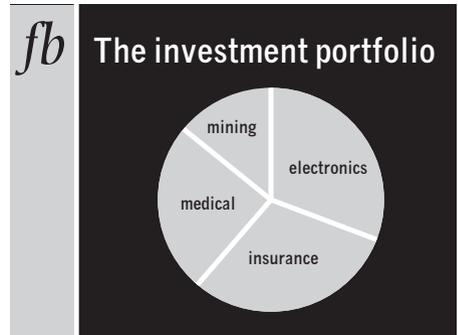
above Your slides should only provide simple handles to help your audience see the structure of your message, or to help you through an unscripted talk. Never pack your slide with words, which you then read out loud.

4 Using a grid to plan your pages and slides

A simple grid – very easy to lay out using word-processing software.

You can use a wide margin for notes, illustrations, or headings.

Double column grids are economical with space. Split lines mean fewer words per line are used, so a smaller typeface remains legible.

The term 'grid' refers to the array of vertical and horizontal guidelines that DTP and presentation programs use to guide your page layout. By using a consistent grid, you can systematically position headings, paragraphs, pictures and other things. DTP and presentation programs make it easy for you to do this. This makes both laying out and reading the finished document much easier.

4.1 Margins

Most DTP programs ask you to start by defining your margins (see *margins*, in GLOSSARY). Most reports will be bound using the sort of office binding system that can take up quite a bit of page space (see *Section 5.2 Binding*, in PUBLISHING GUIDE). In such a case you should treat the inner 35 mm (1½ inches) as out of bounds. Your minimum margin for the outside edge of the page is dictated by the limits of your laser printer (usually about 5 mm or ¼ inch), but for comfortable handling, you should leave at least 12 mm (½ inch) and considerably more if you are using a single column layout on A4 paper (otherwise your line length will end up too long – see *Section 5 Making type legible*).

4.2 Kinds of grid

The kind of grid you need depends on what you want to put in your document. Although newsletters, forms, or catalogues might need a complex multi-column grid, reports normally use quite simple ones. Here are three well-tried alternatives.

Single column grids are simplest of all and are perfectly adequate for a report consisting mostly of straightforward text (see *Section 2.2 Designing*, in PUBLISHING GUIDE). Word-processing software can handle this.

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

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

4.3 **Headers, footers, and page numbers**

Readers can find their way around more easily if you repeat the section or chapter title in running heads (also known as 'headers') at the top of the page (or at the bottom, where they are known as 'footers') (see *running head*, *header*, *footer*, in GLOSSARY).

Page numbers should also be easily seen. They can go in the header or footer line, or in the outside margin if it is wide enough (there's no need for the word 'page').

It is also a good idea to repeat the name of the publication on each page, so if a page is photocopied its source is still clear. This isn't information that readers need when searching through the report, so there is no problem if it is quite small, or near the inside margin.

Try different type styles for your headers, footers, and page numbers, or try using rules above or below them: firstly, it can help prevent headers and footers becoming confused with the first or last line of the text, and, secondly, it is a chance to inject some individuality into your report.

It's a good idea to use headers or footers in your presentation slides: you can incorporate the name of your organization and the title of your talk.

'Rule' is used by printers instead of 'line' to avoid confusion when talking about lines of type.

of field operatives are now equipped with mobile telephones. This has enabled us to cut our response time from an average of eight to four hours, and this should be a significant source of

XYZ Corporation: telecommunications review

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left You can experiment with rules and different typefaces to add personality to your report.

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■ XYZ Corporation: telecommunications review   **49**

5 Making type legible

'Legibility' isn't the same as 'readability'. If it's legible it means that you can *see* what the words say; if it is readable, it means that the language is clear and you can *understand* what it says.

This section is about the legibility of printed documents. The legibility of slides for presentations is a different matter (see *Section 3.4 Legibility*).

It's important not to make a judgement about type size from what you see on the screen. Because type displayed on screen is less legible than printed type, you could end up with a much larger size than you need.

below You can easily set a sample alphabet of the typeface you plan to use, and measure it. A good rule of thumb is for your line to be between 1½ and 2½ alphabets long. These Photina alphabets of different sizes show how the appropriate line length changes with type size. As the last line – a sample of News Gothic – shows, it also varies with typeface.

To make type legible, a range of different factors have to work together. The main thing to remember is that there is an interrelationship between type size, line length, and the space between the lines. Everything is relative – if you increase the type size, for example, you might also have to increase the space between lines to maintain legibility.

The guidelines here are for text designed for continuous reading. Legibility is less critical for short items like headings (where prominence and distinctiveness are the main concerns) and captions (where economy of space is sometimes important).

5.1 Type size and line length

You should aim for about 50–70 characters (including letters, numerals, spaces, and punctuation) per line of text designed for continuous reading. Fewer than that, and there will be too many line breaks; more, and it gets difficult for your eye to follow the line across.

For the main text of a report, 10 or 11 point is generally a good place to start for a single column on standard paper. To keep to the 50–70 characters range, type size can be reduced for shorter line lengths (that is, where you're using a multi-column grid) and increased for longer lines. However, don't be tempted to use very large type in order to achieve long lines. You should use two columns of shorter lines instead.

9 point Photina
abcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklm

10 point Photina
abcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklm

11 point Photina
abcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklm

12 point Photina
abcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklm

12 point News Gothic
abcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklm

An obvious constraint on your layout is the way the report is printed and bound. Most reports are printed on single sheets of paper (often using only one side of the paper) and are bound relatively cheaply. With all office binding systems you lose a proportion of the page width. In the case of ring, comb, or wire binders, the report will open flat, so you lose relatively little. Other systems clamp the paper flat at the edge, and make it difficult to open the report out. So you lose not only the paper

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5.2 **The space between lines**

Most DTP programs refer to the space between lines as 'leading' (see *leading*, in GLOSSARY). Leading is a very important design tool: if you have to use a longer line length than is ideal, or if your software produces uneven character spacing, adding extra leading often helps.

The type specimens provided with this Desktop Solutions pack show Photina and News Gothic with different amounts of leading. Notice that the samples with lead-ing equal to type size seem to be rather crowded, but the samples with more leading are relaxed and easier to read.

Remember that all spacing is relative: if you increase the space between the lines, you'll also need to increase the space above headings (see *Section 9 Perceptual problems and opportunities*).

5.3 **Capitals and small letters**

Because they have ascenders and descenders, words printed in small letters (lower case) have a much more dis-tinctive word shape than words printed in capitals (upper case) only. Capitals are acceptable for headings – Photina capitals make elegant titles – but not for continuous text. If you want to emphasize a paragraph, you can use a num-ber of other techniques (see *Section 8 How design can make your message clearer*). Capitals will just make it ugly.

shape

SHAPE

below top News Gothic Bold works well as a heading type with Photina for the main text.

centre It is not so effective the other way around, though. The more delicate seriffed type is not sufficiently dominant.

bottom You could make it work with a large size difference, but that's only really appropriate for major features like title pages and the start of new chapters. Clear size differences work well in presentations.

News Gothic heading

Choose a typeface for principal headings that is significantly bolder than the text it precedes. It should dominate the text so that readers can easily find their way around.

Photina heading

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5.4 Serifs versus sans serifs

Serifs (see *serif*, in GLOSSARY) give a strong horizontal emphasis to lines of type and seem to improve text that is designed for continuous reading – most readers say they prefer it. However, with plenty of leading, sans serif types can also be very legible. Photina, a seriffed typeface, will be useful for the main text of your report, while News Gothic, a sans serif, is ideal for tables, headings, and captions. Sans serif is particularly legible for presentations.

5.5 Text alignment

Justified text (see *justified text*, in GLOSSARY) has straight left-hand and right-hand edges. Ranged left, or unjustified, text has a ragged right-hand edge (see *ranged left*, in GLOSSARY).

The case against justified text

Justified text does not make your type any more legible, and it can give it a rather closed and formal appearance. With a narrow column, it can also lead to excessive variations in word spaces. You can use hyphenation to avoid this, but you will have to spend extra time to control the automatic hyphenation your DTP program will use: make sure that it adds extra space between words, not between characters; and experiment with different parameters for maximum, minimum, and desired word spaces. Print out and compare the results. You should aim for an even appearance to each line of text.

Ranged left text is a much safer option. The texture of the type is perfectly even, and you've nothing to worry about.

The case for justified text

Some people just prefer it: others feel that it adds professionalism because books and newspapers use justified text. Reports, though, don't need to conform to this style. Presentations, which consist of series of headings and lists rather than continuous prose, should never be justified – their content is rarely suitable.

Ranged right and centred text

Your DTP program also offers you these other choices for type alignment. They are both fine for short items such as titles but are not legible for longer passages of text. Ranged right is useful for captions to tables or graphs, and for side headings appearing in the left-hand margin.

5.6 Paragraphs

You can indent the first lines of paragraphs or not, as you choose. If you indent them, a useful rule of thumb is to set the indent to the same width as your type size. So if your type is 10 point, use a 10 point indent. There is no need to indent the first line of first paragraphs.

The alternative is extra space between the lines (indented paragraphs don't need this). Add at least half your normal line space between paragraphs: so with 10 point leading, add an extra 5 points between paragraphs (making 15 points in all). Be aware, though, that a paragraph end may not be clear at the bottom of a page.

Marketing opportunities for the coming decade

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

above Centred type can be used for short intros or headings. Don't use it for more than three or four lines at a time.

	1990	1991	1992
Type A pumps	8759	9847	10203
Valve replacement kits	5498	6562	7829
Other	453	328	417

above Ranged right type is ideal for row headings on tables or captions to graphs.

■ *Childcare provision*

In response to demographic changes and the expectations of their staff, many employers are looking at the provision of workplace crèches or childcare vouchers.
　Retailers are especially anxious to make better maternity provision, including career breaks and training for returners.
　According to the CBI, eight out of ten jobs created during the next five years will be filled by women, and it is holding its first conference on childcare provision in May.

above This shows the correct use of indention: don't indent the first line of a chapter or after a heading, and use a shorter indent than is traditional in typewritten documents.

■ *Childcare provision*

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Retailers are especially anxious to make better maternity provision, including career breaks and training for returners.

According to the CBI, eight out of ten jobs created during the next five years will be filled by women, and it is holding its first

above You can use extra space between paragraphs as an alternative to indention.

6 Practicalities of page layout

6.1 **Page breaks**

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

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

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

6.2 **Placing illustrations and tables**

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

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

> Reprographics Department Report   27
>
> ───
> bound.
>
> Most reports are printed on single sheets of paper (often using only one side of the paper) and are bound relatively cheaply. With all office binding systems you lose a proportion of the page width. In the case of ring, comb, or wire binders, the report will open flat, so
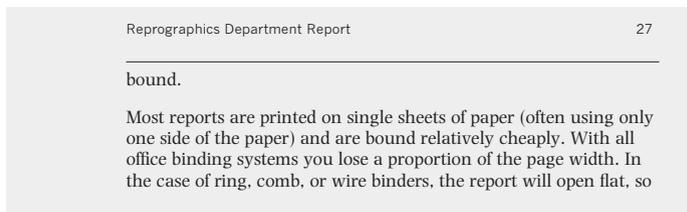
right In this example, the heading should be forced on to the next page. Do not worry about pages having unequal depths.

> lose relatively little. These systems clamp the paper flat at the edge, and make it difficult to open the report out, so we do not recommend them for the company's technical manuals.
>
> **Storage problems**

Monotype Desktop Solutions DESIGNING REPORTS AND PRESENTATIONS
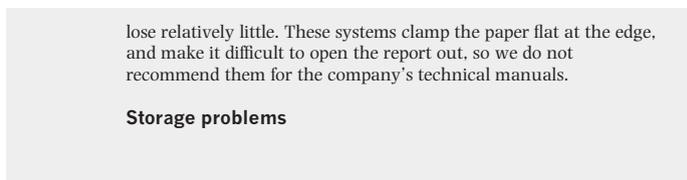
above Be careful when positioning illustrations in double-column grids. In the left-hand page, a heading in the right-hand column happens to align with the picture, which might make readers think a new section has started. In the right-hand page, the illustration breaks up the page into two clear, but inappropriate, zones.

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

Runarounds

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

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

far right A good solution is to make sure that the illustration takes up less than half of the column of type.

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

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

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There is already usable data available for a proportion of the Project population. This will increase over the next months. Data will be downloaded every three months as a check on progress. In order to improve the range of

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7 Making information accessible

Your readers are likely to be busy people, so you'll want to make sure that they can quickly get to the information they need – and understand it when they get there. The graphic design of your document can help them by making the structure of the information clear at every opportunity. The same principles apply to presentation media. The first slide can act as the cover or title, and the second as a contents list or summary.

7.1 Cover

The main job of the cover of your report is to identify what it's about and who it's from. Other information should be cordoned off so it doesn't distract. Don't clutter the cover – it gives the impression you can't organize your ideas.

7.2 Title page

This often contains the same information as the cover, perhaps with a little more detail – such as a subtitle, or a summary of the project's objectives. In a short report the title page is best combined with the contents list.

▌ *Proposal for a new extension to the Chiropody Clinic*

Report to the Development Committee

John Anderson, Barbara Clegg, and Keith O'Donnell
November 1991

Ⓦ *West Hospital, 138 North Avenue, Easton*

Simple covers can be effective. These use Photina **above** and News Gothic Condensed **below**.

The domestic vacuum cleaner market

Report of the 1990 market survey
Elizabeth Zuckermann, April 1991

XYZ XYZ Market Research

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right It often helps your readers to get straight to the point if you combine the title page with the contents list – particularly if your report has a simple structure.

The domestic vacuum cleaner market

Report of the 1990 market survey
Elizabeth Zuckermann, April 1991

1 Introduction: foreign competition increasing *3*

2 Analysis by area: the southern market takes off *7*

3 Technical developments: little innovation *23*

4 Comparison with other sectors *31*

XYZ XYZ Market Research

Unless you write using an outliner, assembling the contents page may be your first chance to see the headings all in one place. Make sure they work well as a set, enabling readers to get an overview of your argument. If they don't, rewrite the headings.

7.3 Contents list

Few reports contain an index, so your contents list should be as detailed as possible. Include as many levels of heading as you can fit in one (or perhaps two) pages.

7.4 Section starts

Each section of your report needs a clear starting point – probably on a new page. Before DTP, reports often looked very monotonous – section starts could be lost in a mass of other headings, tables and diagrams. But you now have a chance to use larger, bolder type to create real landmarks in the document. The prominence of section titles should reflect the size of the report – in a two hundred page document each might take up half a page, but that would look odd in a six-pager.

left The page numbers on your contents list can follow immediately after each section heading. There's no need to line them up on the right-hand edge of the column. If you're in doubt about this, think about the way you read a contents list. You don't scan down the column of page numbers to see what's on page 11. You scan down the headings for the one you want, then go to the page number. It's easier to do this if it is right there, not across a void of white space.

below You can use prominent type and graphic elements (like rules and boxes) to make section starts stand out.

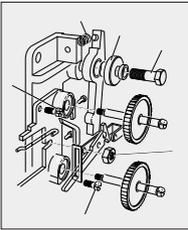**5**   *Developing the data set*

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

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

There is already usable data available for a proportion of the Project population. This will increase over the next months. Data will be downloaded every three months as a check on progress.

22

5   Developing the data set

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

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There is already usable data available for a proportion of the Project population. This will increase over the next months. Data will be downloaded every three months as a check on progress.

In order to improve the range of analysis possible, the data download software (ASCII files) are being augmented, e.g. to

22

12.1 Landscaping proposals

12.1.1 Retention of existing trees

We will retain as many as possible of the existing trees, near what will become the car park. These will be jointly identified by the landscape architect, the local conservation officer and the site manager. These will be fenced around to prevent damage during construction.

12.1.2 Planting scheme for entrance

The car park area
The car park will be bounded on one side by an earth bank planted with berberis for easy maintenance and to discourage vandalism. New trees will also be planted on this bank, and a border of flowering shrubs will be created near the vehicle entrance.

The footpath to the main entrance
Staff and visitors walking from the car park to the main entrance will pass through an avenue of fastigiate junipers underplanted with low-growing laurel; this scheme will involve little maintenance, and will provide an attractive entrance through all seasons. Figure 4 shows the planting plan, and details of the species selected.

7.5 Headings

Readers can use the heading hierarchy when skimming a report to see its main points. You should use clear typographic distinctions between headings of different levels (see *Section 9 Perceptual problems and opportunities*).

7.6 Summaries and conclusions

Reports have conclusions. Although they may come at the end of each section or at the end of the report, they are probably the first thing your readers will turn to. Indeed it is common to find a summary placed at the beginning of a report. Recommendations need to be clearly set out and easy to find. You can put them in the margin, set them in a distinctive and bold type, or in a box.

left Use typographic coding to help readers see the relationship between headings.

---

4 The pilot project

Recommendations
To build on the success of the pilot phase, resources need to be allocated now if we are to retain momentum.

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

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A & B Company: Review of working practices

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

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▶ **Action point**

To build on the success of the pilot phase, resources need to be allocated now if we are to retain momentum.

left Use layout and typographic coding to make recommendations or decision points stand out.

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8 How design can make your message clearer

Because readers often skim reports quickly, they need all the help they can get to see the structure of what you are saying.

8.1 Lists and structured text

Numbers, bullets, and dingbats

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

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

1   Switch on the computer

2   When the screen shows `C>`, insert Disk 1

3   Type `COPY A:PROG.EXE C:`

4   Wait while the program is copied on to your hard disk

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

Stick to the simpler dingbats such as ■ ▲ ● ◆ rather than the more flowery ones (❀ ❅ ❖ ☀). If they look too big, you can reduce their size, or your software might allow you to apply a tint to them.

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

You can reach the airport
■ by cab
■ by car
■ by bus

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

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

Tabular text

You can sometimes simplify complex ideas by laying them out as a table. For example, you might be presenting your assessment of three suppliers' proposals for some new equipment, comparing each on a number of criteria. This can be very hard to follow in sentence form, but very clear as a table in which the content is not numbers but text. And this technique makes sure that you've considered the three proposals on the basis of the same criteria.

8.2 Emphasis

To stress part of a sentence, use bold or italic type. To emphasize anything longer – for example, recommendations or warnings – you can use layout instead of font variation. You can set the text to be emphasized in the margin, outside the main flow of your text, or you can interrupt the text with your highlighted section.

above Tables can simplify complex arguments or comparisons.
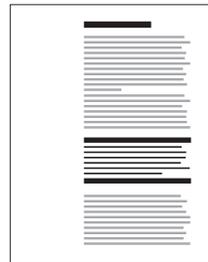
Rules and boxes
The simplest way to set a short section apart is to place it between bold rules in a distinctive type style. You could also place it in an enclosed box.
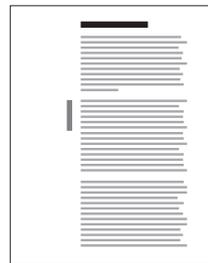
Vertical rules
Vertical rules in the margin are a good way to emphasize a passage without pulling it out of your continuing argument. Use them as you might when marking a book you are reading.

Tinted panels
If your report is typeset, you can put emphasized sections on a lightly tinted background (no more than 20 per cent of black or a second colour if you are using one). Don't do this if your report is laser printed – it won't be legible.

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9 Perceptual problems and opportunities

A heading

B heading

C heading
C heading

B heading

C heading
C heading

B heading

C heading
C heading
C heading
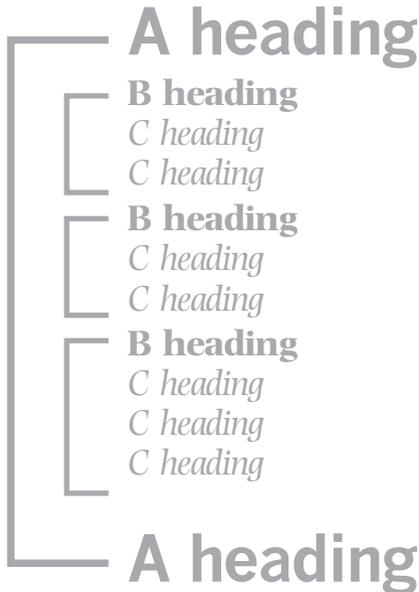
A heading

above Headings at each level have a domain that lasts until the next heading of equivalent status. Smaller headings in between are subsections of the major ones. This hierarchical structure should be reflected in your choice of typeface and use of space.

It is quite hard to keep track of too many levels of heading: try to stick to Section heading, A heading, and B heading. Your word-processing or page make-up software might already have predefined styles provided but you don't have to accept these: you can override them with your own choice.

To use layout to give shape to the logical structure of your text, you need to understand a little about the way people understand graphic structure. Here are three sets of principles that underlie successful page layout.

Typographic hierarchies: things that are bigger or darker are seen as more important than things that are smaller or lighter.

Visual identity: things that look alike are seen as belonging to the same category.

Zones and clusters: things that are enclosed in the same space, or are close together, or are aligned with each other, are seen as related.

9.1 Typographic hierarchies

You can use different typefaces to set up well-signalled visual hierarchies within your report (for example, Photina Bold in a large size for main section headings, News Gothic Bold in a smaller size for subheadings). Each heading in a hierarchy has to dominate all of those below it, so that readers see clearly that less important headings are subcategories of more important ones.

Don't rely on typefaces alone to signal your hierarchy. The more prominent headings should have more space above them (and they'll probably need some space below, too, so they don't crowd the following text). You can reinforce the structure of the document even more by using rules or dingbats. Indents – one of the main techniques used to structure typewritten documents – should be used sparingly.

Towards a strategy for innovation

. . . .

Maintaining creativity with growth

Very few large firms manage to achieve the flexibility and creativity of smaller businesses. Those that have managed to maintain a culture of innovation, in spite of their size, have done so by establishing small development groups for new ideas – firms within firms in which initiative can be rewarded. Our action plan is based on just such a strategy.

. . . .

Development groups

■ *Using the organization's management resources*
Small firms often work better than large ones because of the closer interpersonal cohesion possible in small groups, and the greater ability to reward individual effort. But the small group operating within a large organization has an additional edge – it can use the full resources available to the company to take a properly strategic approach to technological change.

9.2 **Visual identity**

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

3 **Management education**

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

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

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

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

9.3 **Zones and clusters**

Things that are grouped together in space are seen as related. Stated like that it sounds obvious, but it's a principle that is broken surprisingly often.

You can also reserve zones of the page or presentation screen for particular categories of information. In a paper document, this will usually be limited to the margins or the header and footer areas of the page, but in presentations it is a good idea to have a distinct zone of the screen reserved for the title or main point. This will give coherence and focus to your presentation.

The office equipment market 1991

■ Typewriter sales still decline
■ Fax market has flattened out
■ Telecommunications: new products

Faxes: the changing scene

■ Rollfeed faxes have flattened out
■ Product differentiation essential
■ Plain paper faxes now dominate new sales

left These slides reserve a consistent zone for the title or main point.

10 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.

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

10.1 Typeface

You will usually need to use a smaller type size for tables than for main text, and you can use a condensed font (for example, News Gothic Condensed) where space is tight.

10.2 Vertical and horizontal rules

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

10.3 Column headings

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

Income in 1991 ($000)

	North	South
Networks Division	1,279	1,457
Management Services	3,908	2,341
Materials Handling	456	645
Total	*5,643*	*4,443*

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	North	South
Networks Division	1,279	1,457
Management Services	3,908	2,341
Materials Handling	456	645
Total	*5,643*	*4,443*

above The horizontal space between cells is almost always greater than the vertical space, so readers often need horizontal rules 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

left 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.

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

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

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

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

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

10.4 Estimating the width of columns

You'll need to treat each table as a separate design problem: each will have a different number of columns and perhaps different kinds of data to go in the cells.

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

Remember to state what the numbers in the table represent: percentages, people, or dollars. Remember, too, that tables must always have a caption, and often need to state the source of data.

10.5 Aligning data with column headings

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

10.6 Row headings

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

Tractors	Cars		Trucks	
	under 2 litre	2 litre +	under 20 tons	20 tons +
340	6,386	3,592	2,386	1,187

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

11 Graphs and charts

Reports and presentations often include statistical information that is best shown in a graph or a chart.

There are numerous specialized graphs and charts, some of which are specific to particular subject areas. But for general purposes, most people want to do one of three things: they want to show trends, compare totals, or compare proportions. The following examples show the level of detail, line thicknesses, and typesizes that you might use for presentation slides.

11.1 Showing trends

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

right Graphs are best for showing how a situation is changing over time.

Sales ($ millions)

Orders (£000)
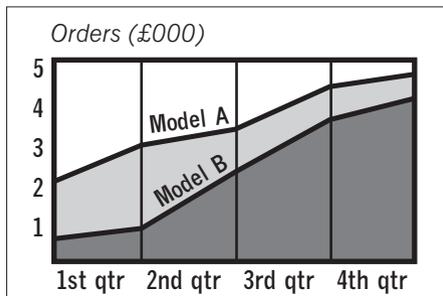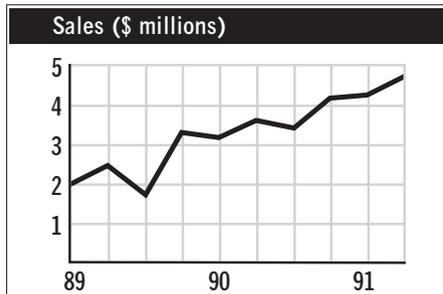
above Avoid stacked line graphs. In this example, readers can't tell if the top line represents orders for Model A, or if it is the total of Model A and Model B.
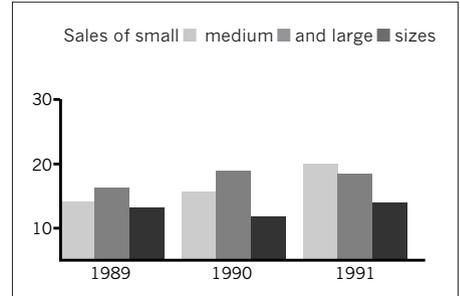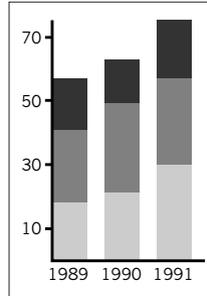

Orders (£000)
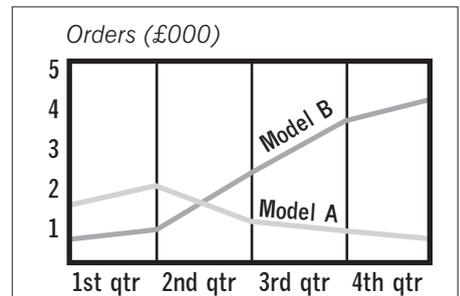
above If this represents the true picture, then the stacked line graph on the left is extremely misleading – it implies that all is well, whereas actually Model A's decline is hidden by the success of Model B.

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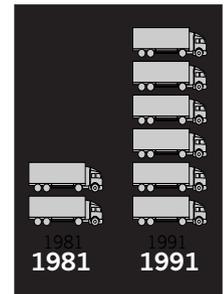
11.2 Comparing totals

Bar charts are the simplest way of comparing totals. They can be arranged horizontally or vertically.

Bar charts work because they allow a direct comparison between lengths that start at the same base – something the human eye is very good at. There are several common techniques around that you should avoid because they don't allow such a simple comparison – including stacked bar charts and different sized symbols. Use side-by-side bars or repeated symbols instead.

11.3 Comparing proportions

Pie charts are a good way to show proportions, but you shouldn't use differently sized pies to compare different totals: again, people can't tell whether it is the height or the area they should compare.

12 Doing it better

12.1 Developing your critical judgement

The more practice you have in designing, the more you'll come to appreciate the subtle effects you can achieve. You can help yourself refine your ideas and techniques by developing your critical judgement. This means not just accepting your first try – print it out, look closely at it, and try to improve it. Apparently small changes can make a huge difference to the appearance of your report. And get into the habit of noticing what you like or don't like about other reports or proposals that you read.

right The right hand example shows several improvements that add up to an organized appearance. The numbering system has been changed, capitals have been replaced with small letters, and underlining omitted. The ranged left type is more even in texture, and the unecessary indention has been removed. Notice, too, that the headings that previously seemed to float between the sections now firmly stick to the section they describe.

(1) FIRE PRECAUTIONS

i) SMOKING

Smoking should be prohibited in areas where computers are in use and 'no smoking' signs prominently displayed. Ash trays or sand bins should be made available immediately outside such areas.

ii) STAFF TRAINING

Staff should be trained in the fire precautions for each site, the procedures for dealing with fires, and the use of fire extinguishers. The procedures should be tested at least once a year.

iii) ACTION TO BE TAKEN EACH DAY

At the end of each working day all waste paper and other combustible materials must be removed, and all back-up tapes and other records stored in the fire-proof safe. Any other

1   Fire precautions

1.1   Smoking
Smoking should be prohibited in areas where computers are in use and 'no smoking' signs prominently displayed. Ash trays or sand bins should be made available immediately outside such areas.

1.2   Staff training
Staff should be trained in the fire precautions for each site, the procedures for dealing with fires, and the use of fire extinguishers. The procedures should be tested at least once a year.

1.3   Action to be taken each day
At the end of each working day all waste paper and other combustible materials must be removed, and all back-up tapes and other records stored in the fire-proof safe. Any other

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12.2 **Office practice versus printing practice**

The chances are that your report will be keyed in by someone (perhaps you) who has been trained as a typist. If that is so, you need to unlearn some of the things you've been taught – they were valid for typewriters, but a different set of conventions is used by printers and publishers. Since you can now use typefaces which have traditionally only been available to the professionals, it can look odd if you don't use their conventions. For example, underlining is not traditional in printing, and can be ugly, cutting across the descenders (see *descender*, in GLOSSARY). In DTP you can use italic type instead.

DTP characters you didn't have on a typewriter
On a typewriter you used the same quotation mark " for opening and closing quotes. Now you can use proper printers' marks (sometimes known as 'smart quotes' or, because of their shape, 6s and 9s).

DTP offers you more extra characters. You can use bullets (●), and for tick-boxes (check-boxes) on forms you can use a dingbat ❏ instead of [ ]. If you experiment you will also find proper dashes and ligatures (see *en dash*, *em dash*, and *ligature*, in GLOSSARY).

12.3 **Putting usability first**

Start with plenty of experimentation but then settle on a style and refine it over a period of time. Make laser proofs frequently and show them to colleagues. Then when you have a style you think works, stick with it – consistency impresses at least as much as special effects. Above all, don't forget that the goal of DTP is to make the user's job easier with legible type, accessible structure, and clear tables and illustrations.

Typing manuals normally recommend double word-spaces after full points. This isn't necessary in DTP. Use just one word space after all punctuation.

Don't underline <u>type</u>
Don't underline *type*

Underlining cuts through the descenders and should not be used where there is an alternative, such as italic.

R Reading list

Business communications

Beason, Pamela S. and Williams, Patricia A., *Technical writing for business and industry*, Glenview, Illinois, Scott, Foresman, 1990.

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