**Chapter No. 11**

**Designing Documents**

**What is document design?**

The design stage is when decisions of how a project/document will look are taken.

In documentation, the design phase is about deciding the following:

* What will the document cover?
* What format will the document take?
* How will the document look?
* In what order will information be presented?

The design stage must take into account the needs of the audience, in order to create something appropriate to their task.

**Elements of document design**

## Introduction

In addition to the overall principles of document design are the specific elements of document design. Where the principles of document design provide considerations for overall document layout, the elements of document design focus on these specific visual elements that make up the visual content of the document: text and typefaces, visuals, graphics, color, and white space.

## 

## Text

**Text** is any size, shape, and placement of the printed word in your document. Text can be placed on your document in the following ways:

* Full justified, also called “justified” – All the text is “flush” on both the right and left sides. To accomplish this, the words in a sentence and letters inside of words can become stretched to fill the space on a particular line.
* Left justified, also called “ragged right” – The text is “flush” on the left-hand side of each page or column of text, but is “ragged” or uneven on the right-hand side.
* Center justified, or “centered” – The text is centered on the page. This is commonly used for headings for brochures, fliers/handouts, and in some newsletters.
* Right justified – The text is “flush” on the right and uneven on the left. Right-justified text is rarely used in most documents, except to line up all of a column to the right-hand side.

Text also can be boldfaced (or bolded), italicized, or underlined. However, these text styles should be used only to draw readers’ attention; they should not be overused. For example, it is recommended that italics be used for short phrases, such as for direct quotations in a brochure or handout, rather than for long passages.

In more advanced layout and design programs, you can adjust the space between letters, words, and lines. You can get some interesting effects by adjusting text spacing. Kerning is the space between letters. Tracking is the amount of space between words. Leading (pronounced with a short 'e' as in “bedding”) is the amount of space between lines of text. Look at some documents to see how close or far apart the spacing is between letters, words, and lines. Adjust the kerning, tracking, or leading to imitate the spacing that you like for your document.

**Typeface**

It is also called type or font—is the actual look of the letters. Type usually is classified into two categories: serif type (also called serif font) and sans serif type (or sans serif font).

Serif fonts are those where the letters have “feet” or “tails,” such as the Times New Roman typeface. Serif fonts are a good choice for printed materials because the “feet” at the bottom of letters make it easier for readers to follow each line of text. Serif fonts trace their history to ancient Rome. Letters were chiselled into buildings’ walls. However, the straight-edged letters created cracks in the walls. To avoid that, Roman architects began putting horizontal edges on the top and bottom of the vertical lines forming the letters. Rounding off the letter by adding these “feet” and “tails” changed the direction of the stress on the walls, eliminated cracks in the walls, and introduced the concept of serif typeface to Western civilization.

Sans serif means “without serif.” Simply put, sans serif fonts do not have “feet” or “tails” on their letters. Arial and Helvetica are examples of sans serif fonts. Sans serif fonts are viewed as more contemporary than serif fonts because they have a cleaner look; many sans serif fonts have been in use only since the 1970s. Sans serif fonts usually are not good choices for a lot of text on a page; they are more difficult for the eye to follow across the page without the “feet” for each letter. Sans serif fonts are recommended for text that is projected onto a screen or read on a television screen or computer screen. Sans serif fonts also are a good choice for short headlines and brief photo captions.

When designing any document, the most important aspect to keep in mind about text and typeface is for the lettering to be large enough and legible enough to be read easily. You also should use no more than two typefaces in a document. Use uppercase/lowercase lettering in your document. Only use all uppercase lettering when you want to call attention to a specific word or short phrase. Readers see all uppercase lettering as if the document designer is shouting at them. Research also indicates that uppercase/lowercase is easier to read. As a result, the federal government is requiring cities across the country to change street-name signs from all capital letters to uppercase/lowercase letters (Copeland, 2010).

Headings, titles, and captions are specific aspects of text applications. Headings and titles orient readers to the start of a topic. They should be briefly worded. Most headings and titles are bolded and larger than the document’s other text. Captions, also known as cutlines, are brief descriptions placed under photographs or graphs. Usually a caption provides information on who is in the photograph, what is going on, where and when the action happened, and why the action is significant. Studies have shown that most people read captions immediately after they read the headlines.

**Colour**

Colourcan be used to draw attention because visual elements with colour have greater visual weight. Certain colors also are interpreted in specific ways by most people. Warm colors are reds, yellows, and blends of those two colors (orange). These colors are related to heat, fire, and the sun. Cool colors – blues and greens – relate to the sky, sea, and wilderness. Depending on what message you are trying to get across to your audience, you may want to use one of the following colors:

* Red is the most dramatic color. It excites and stimulates people. Red is often associated with aggressive behavior, passion, success, and impulse. Use red sparingly, because it is such a “hot” color.
* Bright yellow often is associated with health and well-being. Yellow is also associated with caution. For example, all traffic signs that pertain to caution – such as yield signs – are in yellow.
* Blues are associated with tradition, orderliness, and stability. Light blues are associated with cleanliness. Dark blue colors seem to have a calming effect. Purple is seen as daring, royal, and elegant.
* Greens provide a sense of nature and regeneration. Green is used by many environmental organizations.
* White is a symbol of purity and innocence in Western countries.
* Blackusually signifies finality, ending, and death in Western countries.

## Graphics

Graphics are lines, borders, and boxes in your document. These are used to highlight or draw attention to an area of the document. To emphasize a particular part of your document, you may place a border around a photograph. Graphics also are used to separate visual elements. For example, a box around a newsletter story could separate it from other stories on the page. Small lines under a photograph’s caption could be used to separate the caption from the rest of the story. Graphics should be used sparingly. Do not place a box or border around each visual element on your page. If you use shaded boxes, make sure that the shading is not too dark. A shading of 10 percent is usually all you need. A shading of 20 percent or greater may be too dark to read for the text.

## White Space

White space (also called “blank space” or “negative space”) is the area not taken up with text or images. White space is used to create a sense of openness. Too many elements on a page can look confusing and detract from the overall visual appeal of your page. White space separates paragraphs and provides margins at the edges of your pages. Areas occupied by text or images are called positive space.

**Goals of document design**

When designing documentation, technical writers have five aims to keep constantly in mind. - These goals are best defined in Technical Communication by Merkel.

* Make a good impression

Documentation must look professional and create a positive image of the product and the company.

* Clearly define information structure

The documents must be easily navigable and follow a logical and reasonable order

* Give the readers the information they need

Documentation is sharing knowledge, not hiding it, documents must be designed to make finding information easy.

* Help readers understand

Documents must communicate clearly and accurately.

* Help readers remember

Well designed documents make the information easy to remember by using visual prompts and elements.

**Visuals**

Visuals are anything in pictorial form, such as photographs, drawings/illustrations, clip art, and graphs and charts. The functions of visuals are to grab the reader’s attention and to support or provide explanation to the document’s overall message.

Photographs show the actual physical images of objects. Photographs have the advantage of realism. One disadvantage is the extraneous details in the photograph that may detract from the message.

Drawings/illustrations can depict imaginary objects or real objects difficult to photograph. Drawings can show only the parts the reader needs to see. Drawings give you the advantage of control by eliminating extraneous detail and emphasizing what you want to emphasize. Illustrations should be clean and simple.

Clip artis an alternative to drawings. Clip art can be found online or purchased on DVDs.

Graphs and charts provide information, usually statistics or numbers, in an easily understandable visual form. Graphs and charts should be clear, uncluttered, suited for the reader, legible, and placed near where they are mentioned in the document. Graphics and charts must have brief but understandable titles. Some graphs and charts will have a key that explains symbols used in the visual. Graphs and charts come in different forms, based on the type of information that is being communicated. Some of the most common ones are info graphics, bar charts, pie charts, and line graphs. If your graphs and charts are in black and white, be sure that readers can differentiate between the shadings of the different sections of a pie chart or bar graph, for example.

* Info graphics is the term to describe the use of visual elements to communicate complex information quickly and clearly. Info graphics use recognizable images to represent specific quantities. For example, instead of using a line graph, a document designer may use an illustration to represent numerical data. The illustration adds visual appeal to the information. The Snapshots features used in USA Today are good examples of info graphics.
* Bar graphs show comparison at different times, locations, and conditions. Bar graphs are easy to understand and can be either vertical or horizontal.
* Line graphs display trends over time in amounts, sizes, rates, and other measurements on lines. Line graphs give an at-a-glance impression of trends and forecasts of data. You should have no more than four or five lines presented in a line graph. It is best to distinguish different lines by using different colors or thicknesses. Show current data with solid lines, and illustrate future data with broken lines.
* Pie charts are best at showing what parts make up the whole and at comparing relative sizes of the parts. A good example of a pie chart would be to show the ethnic background of all of the students in a school. Pie charts are most effective with six or fewer sections or “slices.”

**Format choices in document design**

# Document format

When you create a document, its page dimensions are of paramount importance. This should be chosen according to the document's content – not just the amount, but its meaning, its structure and organization, and its target. From the menu, File > New brings up a dialog with various options, confusing for the beginner, yet still essential to the document's design. Not only does this need to anticipate the layout, but also the eventual output from the printing equipment.

## Size

For convenience, as well as efficiency, it is common to use proven standards of size based on ISO specifications. Worldwide, the most common standard is based on the **A formats**, especially the widely used A4 commonly used in your computer's local printer – US Letter is similar in size.

### Principles of Imposition

Depending on the specifics of the commercial printing equipment, the printer may do an imposition, with assembly and arrangement of the pages to be printed on a paper size much larger than the finished document's pages, since this paper will be folded in order to create the final size. This not only saves the amount of paper handling involved, it easily allows printing to the edges of the page.

Below we see a scheme of imposition depicting the distribution of a 16 page document on 2 sides of a sheet of paper. When properly folded and then cut, the pages will be in the correct order on 4 smaller sheets of paper.

Imposition is facilitated by having paper sizes where there is a constant ratio of width to height, regardless of size. Throughout the A format series of papers, there is a relationship of width:height of 1:2 . Thus, one can subdivide 1 sheet of A0 paper into 16 sheets of A4.

Here we can appreciate the flexibility of the A format series – the A1 width is half the height of A0, A2 width half the height of A1, and so on, and thus this 1:2 ratio is maintained throughout the series.

When you look at the Size choices for the New Document dialog, you see that Scribus has a very large number of choices for you.

## Orientation

There are two choices for orientation:

* **Portrait**, the most common, since we are accustomed to using paper taller than it is wide.
* **Landscape**, utilized for special situations, when width of objects or lines needs to be large. Many brochures will have a landscape orientation.

## Units

The units of measurement are important, and are used throughout Scribus, for position and sizing of various elements of content, plus guides and margins, as well as the dimensions of the document itself.

The default units are points, a worldwide standard for typographical and printing measurements, A typical font which is 12 points in height is one-sixth of an inch.

A more generally used unit is the metric system, specifically millimeters for DTP. Since Scribus will automatically convert from one unit system to another, you can use whichever suits your purpose. Whatever page unit you use, you will see that your fonts, and font relationships, such as linespacing, will always be measured in points. It is recommended that you use or become familiar with a smaller unit, such points or millimeters, since these allow for greater precision when positioning and sizing objects.

In the New Document dialog, under Options, note the Default Unit which is set. Even if you forget to change this setting, you can change your units at any time. For convenience, go to File > Preferences > Document to change your default setting.

## Document Layout

In the upper left corner of the New Document dialog, there is a setting for the page display on the canvas.

* Single Page is commonly used in general, and for single sheet documents such as flyers or advertisements. This could also be used for a PDF available on the internet.
* Double Sided is another commonly used display, since it conveniently displays the right and left pages of a book or periodical with their relative relationships while reading. Remember that imposition of the pages for printing is a separate step.
* 3-foldand 4-fold displays would be analogous to the double sided where 3 or 4 pages will be seen side by side. Note that Scribus will save, export, and print these as individual pages.

As was shown in the chapter **Hands on**, if you would be planning to make a folding brochure from an A4 or similar paper, start with Single Page A4 oriented in landscape, then use guides to help position your content.

If you have some idea of the number of pages your document will have, you can create as many as you need under Options. If not, you can easily add or insert more pages later.

As desired you may also create Automatic Text Frames, which will fill the page to the margins as each page is created, either at this stage or as you add pages later. Such frames will be automatically linked from one page to the next, and furthermore, you may specify the number of columns and gap between them.

## Margins and bleeds

The use of margins is a personal preference, and mainly serves as a guide for placing your objects in the layout, maintaining a certain white space at the edges. For a Double Sided display, you have the choice of some standard margins, such as Gutenberg, Fibonacci, Golden Mean, or Nine Parts, which will of course be appropriately adjusted for right or left pages. If you are printing on your own printer attached to your computer, be sure not to exceed the printing area of your printer, and clicking Printer Margins... sets the margins for that purpose.

### Highlight your information

At first glance, creating margins seems simple, yet consider that you are highlighting your text by the balance of white space around it. There may indeed be some elements which go to the paper's edge, like some background image or a swatch of color, but these are not the items you wish the reader to focus on. The focus should be placed on the text and any informational images you may have.

### Create margins

Although you may be tempted to have identical margins around the page, and certainly there is a way to link the margins so that they are all the same, you would likely only want this for something like a newsletter or magazine.

* Most books will probably have some scheme in which the top margin is narrower than the bottom, and the outer margin larger than the inner (near the binding).
* Make sure that you have a minimum of 5mm (14.2 points) of inner margin, to allow for page area lost to the binding.
* If you are using a Double Sided display, you will have a choice of some traditional proportioned margins under Preset Layouts – **Gutenberg**, **Fibonacci**, **Golden Mean**, and **Nine Parts**.

### Bleed

Bleed is an area at the margins of your page which will be trimmed away after printing. Whenever you wish an image, a color, or graphic to print to absolute edge of the paper, this will guarantee that in your finished product, since you will make sure the object extends slightly into that bleed area. It's also worth noting that the bleed width is added to the page dimensions you specified under Size, so that for example, an A4 with bleed will be trimmed to A4 size.

Here we see a right page of a double sided display, with Gutenberg margins. The area outside the red rectangle is the bleed area.

**Document Layout**

**Layout** is the part of [graphic design](https://en.wikipedia.org/wiki/Graphic_design) that deals in the arrangement of visual elements on a [page](https://en.wikipedia.org/wiki/Page_(paper)). It generally involves organizational principles of [composition](https://en.wikipedia.org/wiki/Composition_(visual_arts)) to achieve specific communication objectives.

## Some basic principles of layout

* Document layout, in its most basic sense, is the art of arranging 'blocks' of content (text and images etc.) on a visual plane (the page/s). It includes making judgements about balance, dominance, order, flow, alignment and space. Well designed documents can make content easier to read and so enhance comprehension.
* Will a symmetrical (centred) layout suit your overall design or would an asymmetrical (non-centred) layout be more appropriate? An asymmetrical layout can be very useful for documents with navigation or side quotes.
* A common device used when designing a document is a layout grid—it is used to divide the page up into regular column and row divisions, which then act as guides for the arranging and alignment of objects.
* Dominant elements can be used to help guide the reader/viewer, highlighting key break points in the information and emphasising important concepts and ideas.
* Spaceis a handy tool in the layout arsenal—it can be used to open up very text dense documents to improve readability, to help provide visual balance on a page and to aid the flow of information.

#### LAYOUT PROCESS:

1. Fixing the page format (size)
2. Creating the document
3. Defining the type area
4. Fixing the design grid with text and stylistic elements
5. Make-up and final corrections

# Creating a Visual Argument

Directions: You have had an opportunity to analyze and evaluate several visual arguments, and now you will create a visual argument of your own. You must follow the steps listed below and turn the work in on the assigned dates.

**Tasks:**

1. **Develop a claim**—Use the ideas you generated in your freewrite to identify a subject and opinion/position. Then develop a clear and concise statement of you claim.
2. **Develop support**—Map out your “rhetorical situation” by carefully considering your audience. For instance, are they typically young, old, male, female, naïve, educated, powerless, powerful, or is you audience a mixed bag? What does this group value or believe in? What special needs might they have? Also, what hang-ups or problems might they have, especially when it comes to your issue? After your brainstorm develop a detailed description of at least three (3) pieces of support (images, color, text/dialogue) that you intend to use in your argument and briefly explain their significance. Before you start developing your support, make sure that you have a clear purpose in mind; that is, decide what the intention of your argument is—to inform, to convince, to persuade, to entertain. Having a clear sense of purpose will enable you to make informed choices about the support you will need and how you will present it.
3. **Create a concept/rough draft**—Compose a rough sketch/drawing which effectively communicates your argument. The claim, if not stated directly/explicitly in your argument, should logically follow from an analysis of your supporting parts. *Don’t over do it—Less is more*.
4. **Revise your argument**—Meet with a group of your peers and use the grading rubric below to assess your rough draft.
5. **Final Argument/Paragraph**—Based on the feedback you receive from your peers, make the appropriate changes/revisions to your rough draft and develop a complete and polished final draft of your visual argument. Attach to the argument a typed one (1) paragraph ***analysis*** which includes a clear statement of your claim and purpose along with an explanation of how at least two (2) key parts of the argument utilize the rhetorical appeals (ethos, pathos, logos) and connect or relate to the whole/claim.

**Assessment:**

Your argument will be graded using the following criteria:

* Author establishes strong relationship between the argument’s claim and supporting details (images, text, color)—an analysis of all supporting parts contributes to a clear understanding of the claim.
* Argument fulfils its purpose
* Argument demonstrates creativity, originality, and critical thinking.
* Argument is neat, polished, and free of errors—reflects author’s best effort.
* Attached to the argument is a typed one (1) paragraph ***analysis*** which includes a clear statement of the author’s claim and purpose along with an explanation of how at least two (2) key parts of the argument connect or relate to the whole/claim.

**Presenting Issues:**

**Frame the Issue**: You must frame up the key issue you need help dealing with. Don’t distract Management with ancillary issues or symptoms of the problem you are trying to solve. Framing it as an issue will make it easier for your Management to help.

**Be Complete**: Make sure you provide a full picture. Give a brief background to orient your Management. Provide context. Using a visual like a data table can helpful. Be sure to clarify fact from supposition.

**Strategize And Think Through Reasonable Options**: Share the options you’ve considered. Include a description of the pros and cons as you’ve thought of them. Invite your Management to add their perspective and ideas for how to address your challenge.

**Share Your Recommended Course Of Action**: After listening to all the input, propose a course of action to Management. Don’t wait to be told what to do. Make a recommendation and explain why you think it is the right thing to do. Share what you see as the benefits and risks. Ask for alignment and any resources you need for execution. Get agreement on how to keep Management informed of progress.

**Present With Passion**: Own the problem and the solution. Don’t make Management feel like you are abdicating responsibility. Feel free to ask for their direct help in removing a barrier, getting you access to resources, or providing political cover. Management wants to help you be successful and will typically be willing to be an active part of the solution, but there will still be an expectation that still own the problem.

**Providing Evidence**

**What is evidence?**

Evidence is information that supports your claims. Just as a lawyer must provide evidence to prove beyond a reasonable doubt the guilt of the accused, writers must provide evidence in the form of ideas that convince the reader to agree with their claims about a given topic.

**What does evidence look like?**

Evidence may appear as direct quotations, paraphrased ideas (other authors’ ideas re-phrased into your own words), statistics, and other information gathered from external sources, such as tables, charts, and photos. The types of evidence you use may also depend on your field of study. For instance, statistical (also called empirical) evidence may be appropriate for a science paper, but less so for an English literature paper. In turn, a poetry quotation may not be appropriate evidence for a science paper.

**Where do I find evidence?**

Credible evidence (evidence which is trustworthy and plausible) comes from credible sources. For instance, a peer-reviewed academic journal—whereby research papers submitted for publication are scrutinized and critiqued by topic experts with PhDs before they are published— is a much more credible source of expert-level information than popular media written for the general public (for example, glossy magazines). Also, if you refer to websites for evidence, do so with caution because there are very few, if any, quality control measures to ensure the credibility of web-published information. In summary, choose your evidence sources carefully and with a critical eye.

Always select the most recent evidence, especially in fields of study in which knowledge advances rapidly (for example, national economy statistics may be updated annually or even monthly). Broadly speaking, recent research is typically regarded as that which has been published within the last five years, but this definition does not suggest you should always ignore older evidence—especially if it represents the most recent evidence on your topic. Older evidence is acceptable in many contexts. For instance, many scholars may use decades old “milestone research” as evidence, because it is still considered the gold standard for its particular field of study.

**How/when should I incorporate evidence?**

Offer evidence that supports (agrees with) your argument:

You may also offer evidence that conflicts with your position (counter-evidence), and then argue against it to further strengthen your own position. Revealing weaknesses in the logic of counter-evidence is a powerful method for justifying your stance and shows the reader that you have methodically thought about your argument. Offering counterevidence also shows the reader that you have avoided “cherry picking” your evidence.

Cherry picking means purposefully only choosing evidence that supports your claims and ignoring information that is relevant to the broader debate, and as such, warrants acknowledgement even though it may contradict your argument.

* Use examples of competing evidence against each other to simulate a debate.
* Use quotations to support your ideas, but not simply to state or restate your claim.

Quotations are ideas expressed word-for-word as they appear in the original text enclosed in quotation marks (“like this”) and should complement your own thoughts.

**Sample Documents**

