

Chapter 6: Document Layout and Design

Overview

This chapter discusses the importance of document layout and design, including the paper size/type, graphics and text, color usage, and layout on the page. Document layout and design is not limited to paper; it is also important for creating effective Web pages. No matter the kind of document created, it is critical that everyone in the organization is aware of the legal aspects and protection under copyright laws. Be sure students understand that these laws do change, and they should always be aware of the current laws before reproducing anything. This chapter provides a lot of practical information that can be used in the office every day.

Lecture Notes

A. Document Layout

Before planning layout and design, be sure to understand the purpose of the document and the intended audience. Start with the end product to ensure document layout and design is focused.

1. Create an idea folder so that you have a collection of samples to look at when planning a new **Type of Project**.
 - a. Review samples to kindle ideas for your new project. Create an ongoing collection to review.
 - b. Improve design to meet your needs.
 - c. Make rough sketches (thumbnails), keeping in mind the purpose and audience. The rough sketches should be used to create more comprehensive sketches, including colors, number of pages/folds, trim size, image placement, columns, type specs. *Review terms discussed.*
 - Greeking shows appropriate type size, line spacing, and text placement, but does not include the final text.
 - Cropping is trimming an image from the edges.
 - Rotating is pivoting in image around its center.
2. **Paper** choices should be considered related to the reproduction methods that will be used.
 - a. Sizes include letter, legal, tabloid.
 - b. Weight is based on the entire ream (500 sheets). Read about your printer or copier to see what will work best.
 - c. Color paper is often used for documents, but even shades of white vary.
 - d. Finish ranges from rough to smooth, coated or uncoated, cotton content or bond. The quality of the print varies on the different finishes.
3. **Folding** changes the size of the document pages; each of these pages is considered a panel.

- a. Types of folds include four-panel, six-panel, and eight-panel. Determine the number of folds before creating the comprehensive sketch.
 - b. Be aware of folding issues to avoid problems.
 - Avoid smudging and marking of ink.
 - Fold with the grain whenever possible; lower cotton content is helpful if going against the grain.
 - Avoid washout or creep.
 - Heavier stock paper requires more planning to fold effectively.
4. **Graphics** are often incorporated into documents.
- Clip art is included in productivity software or available on the Web. A .tif format is recommended for reproduction purposes; .gif and .jpg are both common formats found on the Web. Image editing software can be used to make adjustments.
 - Other images can come from the Web, scanner, or digital camera; they can include photos, illustrations, charts/graphs, and drawings.
 - Review scanning guidelines to maximize the quality of the scanned images.
 - Be aware of copyright issues when borrowing images from the Web.
5. **Print Run** refers to the number of finished pieces in a job. Costs will vary from convenience copiers, printers, commercial print shops, reproduction centers, but choosing the most appropriate method is based on the print run.
6. **Reproduction** options produce various qualities of output.
- a. Printers are used when a few copies are needed, the resolution is adequate, and the paper size is accepted by the printer.
 - b. Copiers are for low-volume jobs (<25).
 - c. Reproduction centers have more sophisticated equipment that can reproduce large jobs quickly.
 - d. Commercial printers are used for high-quality, high-volume jobs; the process is superior to photocopying, but also more expensive.
7. **Other Layout Considerations** include:
- a. Banner for a publication includes the title and serial information (date, volume, and issue number); may also include a logo or image.
 - b. Banner for a Web site is a rectangular advertisement surrounding the main page content; used in many e-commerce sites.
 - c. Masthead for a publication is also called the name plate or flag. It is the credit box that gives information about the publication, including the title, editors, sponsors, writers, illustrators, photographers, and other contributors; usually placed on the inside page.

B. Document Design

Typography refers to the overall arrangement and appearance of the printed matter on a page.

1. **Proximity** relates to grouping related items together logically and with organization.
 - a. Visual units make the page organized, let the reader see the beginning and end, and make effective use of white space.
 - b. Emphasis on key words or phrases is done by enhancing the text with a bold, underlined or different typeface.
 - c. White space is an intentional blank area; effective use is a sign of professional design.
2. **Alignment** relates to the placement of items on the page, horizontally and vertically.
 - a. Left and right alignment are also referred to as flush left or flush right.
 - b. Centered alignment is easy and comfortable; common for novice designers.
 - c. Justified refers to aligning at both the left and right margins for a framed look; common in books and magazines.
 - d. Vertical alignment relates to space above or below the text.
 - e. Mixed alignments can be used, but Keep It Simple.
 - Visual units placed on the page horizontally should be aligned with the bottom line.
 - Visual units placed on the page vertically should be aligned with the left or right edge.
 - The edge of a graphic should be aligned with the edges of other visual units.
 - Order creates a calm feeling.
3. **Repetition** of an item or color holds the units together. Some aspect of the design should be repeated throughout the document for consistency.
4. **Contrast** should be used, but conflict should be avoided. *Review the ideas for contrast; discuss others.*
5. **Typeface Characteristics** are an important consideration with design. *Review the characteristics displayed in figure 6-2.*
 - a. Stress or no stress on the oval can be vertical or diagonal stress, in serif fonts (old style, modern, slab serif, sans serif fonts all use a uniform stroke).
 - b. A serif is a small decorative stroke that is added to the end of the letter's main strokes.
 - c. Sans serif is a font without the small decorative stroke added to the end of the letter's main strokes.
 - d. Strokes are either uniform or have a thick/thin transition in a letter stroke.
 - e. Specialized typefaces have unique features that should be used for special purposes.

6. There are multiple ways to **Design with Type** to create contrast within the document.
- a. Select different typefaces within a document after examining the relationship.
 - Using one typeface without much variety in size or emphasis is a concordant relationship.
 - Contrasting typefaces are distinctly different from one another.
 - When the visual appearance between typefaces is not the same yet not significantly different, then a conflicting relationship exists.
 - b. Applying different type with contrasts can be fun, as long as you follow guidelines.
 - Various sizes of text are a good way to create contrast, as long as the size difference is enough to see.
 - Weight of typefaces is an effective way to add visual contrast.
 - The typeface structures varies. *Refer to figure 6-2 again.*
 - The form or shape of a letter must be looked at so that it is easy to read. Look at regular versus italics, capital versus lowercase, drop caps.
 - Spacing between lines, words, characters, pages, and columns should be considered, including leading, kerning, track spacing, monospacing/proportional spacing, gutters, trapping, and specialized spacing.
 - Direction refers to the placement of text on a slant.
 - Colors are used to produce a reaction; choose them carefully. Familiarize students with the primary colors of pigment, primary colors of light, and primary colors of a subtractive color system.
7. **Web Publishing** is used to create Web pages that are viewed over the Internet. Pages are designed on the standards of HTML. There are considerations that are different from designing printed documents.
- a. Design for accessibility from multiple browsers.
 - b. Be aware of connection speeds when using graphics; many users are still using dial-up access numbers.
 - c. Make sure the type font and design are easy to read on the computer screen. Georgiana and Verdana are very common.
 - d. Consider the way that text is emphasized on the monitor; be sure it is legible (size, underline, color, bold, italics, capital letters).
 - e. Web design software makes creating a Web page easy.
8. **Proofreading and Editing the Document** is critical no matter what kind of document is created. While software does include spell-checking and grammar-checking tools, be sure to remind students to check the text themselves. These systems do not recognize all errors.

C. Legal Issues Relating to Reproduction

This is one of the most important areas related to reproducing work. There are many types of documents that cannot be reproduced, as well as many that have restrictions related to reproduction. These laws are still changing, so regular review is necessary.

1. **Copyrighted Materials** include original works; they are copyrighted from the time they are created, no matter whether they are published or not. A copyright notice is optional on items created after April 1989.
2. **Copyright Law of 1976** added a fair-use clause to the previous laws. It applies restrictions to items that can be reproduced in order to promote the reading and study of important documents.
3. **1994 Conference on Fair Use** addressed multimedia, visual archives, and digital libraries. It specified that copies can be made if there is no commercial intent, if the archive is open to the public, or if the reproduction includes a notice of copyright.
4. **Reproducing Materials from Copyrighted Sources** is okay with permission from the copyright owner. Request must include the intended use of the copy; there may be a charge.
5. **Copyrighted Materials on the WWW** deserve the same respect. You can usually e-mail the person maintaining the site for information related to permission. Always use a "Reprinted with permission" line including the copyright holder and/or Web address.
6. **Photographs** are also copyrighted; the copyright is held by the photographer.

Additional Resources for Students

Recommended readings (no texts should be more than two years old):

- Tilton, R., J. Jackson, and S. Rigby. *The Electronic Office: Procedures and Administration*. South-Western Publishing Co.
- Boone, Louis E. and David L. Kurtz. *Contemporary Business Communication*. Prentice-Hall, Inc.
- Bovee, Courtland L. and John V. Thill. *Business Communication Today*. McGraw-Hill, Inc.
- Calkins-Fulton, Patsy J. and Joanna D. Hanks. *Office Technology and Procedures*. South-Western Publishing Co.
- Guffey, Mary Ellen. *Business and Administrations Communication*. South-Western Publishing Co.
- Himstreet, William C. and Wayne M. Baty. *Business Communication*. Kent Publishing Co.
- Ober, Scott. *Contemporary Business Communication*.
- Oliverio and Pasewark. *The Office: Procedures and Technology*. South-Western Publishing Co.

- Quible, Zane K. *Administrative Office Management – An Introduction*. Prentice-Hall, Inc.
- Parker, Roger C. *Looking Good in Print: A Guide to Basic Design for Desktop Publishing*.
- Ray, C., J. Palmer, and A. Wohl. *Office Automation: A Systems Approach*. South-Western Publishing Co.
- Regan, Elizabeth A. and Bridget N. O'Connor. *Automating the Office – Office Systems and End-User Computing*. Macmillan City.

Current issues of periodicals or business publications are also an excellent resource. Some of the following periodicals have an accompanying Web site.

<i>Current Periodical</i>	<i>Web Address</i>
<i>Gregg Reference Manual</i>	
<i>IAAP Complete Office Handbook</i>	http://www.iaap-hq.org/products/handbook.htm
<i>Modern Office Technology</i>	
<i>OfficePro</i>	http://www.iaap-hq.org/officepro/toc.htm