Chapter

6

The Presentation of Written Information

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The importance of good presentation

Earlier in this book (Chapter 2), we looked at the formats appropriate to particular types of technical writing such as emails, reports and instructions, and at the conventions of style and layout which should be followed. There is another aspect, however, of the effectiveness of written information: its presentation. This is largely a matter of reader goodwill. If the document looks both professional and inviting, the reader will want to read it. If it looks scruffy and difficult to approach, the prospective reader will be put off, and will relegate the paper to the bottom of the pile, or, worse, the wastepaper basket. A report which looks less than professional undermines the credibility of both writer and company; instructions which do not look 'official' may be ignored.

In this chapter, two different aspects of presentation are discussed: checking (to make sure that the correct information is correctly presented) and the layout of the printed page.

Checking the facts

Most documents are checked for factual errors. Before starting to write, an author may need to make reference to previous similar documents, company guidelines, and books and journals in a library belonging to the company or a professional institution. Later, the writer will go back over the document, to make sure that its contents are technically correct and in accordance with company policy.
A colleague's opinion may well be sought. In the case of a report or specification, a draft version is likely to be passed up the hierarchy of the author's organisation so that it can be checked by more senior managers. In passing, it is worth mentioning that any changes made should always be for a good reason. Too many documents are subjected to a manager's need to 'make his/her mark' (the subconscious 'if I don't alter something, how can I show that I'm doing my job/ how can I show how important my opinion is?' response). Nevertheless, it is generally true that this stage is valuable in order to ensure that the document contains the right information logically presented, and that it is within the limits of what may be revealed; this is especially true when company confidentiality or security is involved.

In the case of instructions, the most sensible way to check what has been written is to ask a colleague to carry out the procedure under the writer's supervision; if a stage has been omitted or the wording is not clear, the problem should be immediately apparent. It is, of course, wise to choose a colleague who does not normally carry out such activities, or the correct action might be taken automatically despite instructions to the contrary.

> All documents should be checked for factual accuracy.

Checking the text

The second stage of checking is often overlooked. The facts are assembled and the correct information has been obtained, but what appears on the page is not what the writer intended. Engineers nowadays write directly onto the computer. They remain physically and mentally close to what they are producing; it is there in front of them, available for revision, additions or deletions at any time. The writer knows perfectly well what was intended, to the point where he or she will see it even if it isn't there.

We are all bad at checking our own work. Our interest and involvement are with the information, not with the actual writing, and it is all far too familiar to us. We fail to see what has gone wrong. There are two results of this failure, and both

are serious for the individual and the company in whose name the document is to be sent out. The first is that incorrect data are passed on to the reader (colleague, client, general public). It is easy to imagine the impact of a nought missed off the end of a price in an estimate or an invoice. It is impossible to guess at the amount of time and money wasted annually in telephone calls, meetings and discussions which take place to find out what is wrong with the product, system or payment, all because nobody bothered to check the original wording and notice the mistake. It must run into millions of pounds. In the case of engineering information, the results of error may be even worse, in terms of industrial accidents and personal injury.

The second result of the failure to check what has been written is almost as serious, but even harder to quantify. It is the loss of professional credibility. The reader is, after all, taking for granted the expertise of the engineer who produced the document. Readers will order equipment on the basis of the information given; they will become involved with costly projects or stake the reputation of their companies or even their lives on the accuracy of the details they have been given. As soon as they see a mistake, however small and insignificant it may be in itself, they will start to worry about the accuracy of everything else. This is particularly true of mathematical information. If a letter in a word is misplaced or omitted, readers may well be able to guess what the word should be. The lasting effect of, for example, two letters transposed in a word is to make readers doubt *every figure* in the writer's specification, quotation or test report. Everything is suspect and therefore potentially unreliable.

> Keyboarding errors distort information and undermine credibility.
>
> All documents should be checked for accuracy of presentation.

There is no easy or complete answer to the problem of keyboarding errors. Computers have built-in spellchecks which are helpful provided they are not used as the only form of checking. They will highlight nonsense words, but not the wrong word which makes sense or which is common throughout the document. 'Now' instead of 'not' is an outstanding example of the dangerous mistake which the spellcheck will ignore. It reverses the meaning and yet appears to make complete sense, as in:

The car is now safe to drive.
The car is not safe to drive.

This critical error will be picked up only by an alert human reader.

Ideally, every document should be checked specifically for such errors. In practice, the level of checking will depend on the perceived importance of the

Activity 6.1 Checking

The following passage contains a number of deliberate mistakes. Some will be identified by the computer and others will not. Try to identify them all, and then compare your list with the suggested version at the end of the book.

Most industrial sheds in the aria are strategically placed on the industrial estate well away from from the town and towards the motorway. From the mid-1980s, developement also took place on the old railway sidings. The single-story units are usually large and open-plan. Styles vary form brick units with large shutters and few windows to large corrigated or plane metal units with a skeletal frame and now widows. Maintenance is slow, as is rent. Refurbishment is easy, and may units incorporate a mezzanine level. The local area is wide and flat and allows for easy packing and good delivery facilities.

document concerned. Short emails and other comparatively casual writing may be checked quickly on the screen or as a printout, and this is probably sufficient. All reports and similar documents which travel outside the company, and all specifications, instructions and manuals, should be thoroughly checked for errors of writing as a separate activity from checking the facts. It is dangerous simply to combine these two operations, as inevitably the facts will appear to be more important. The best person to check the text itself is almost certainly a colleague who is familiar with the sort of information presented, without being an expert on the immediate subject discussed; it is important that this reader will not make assumptions about the writer's meaning. Diagrams, appendices and equations (the last of these particularly difficult to check) must be included in the checking process. The title page is often overlooked, partly because it is assumed to be correct and partly because it usually contains capital letters, which are difficult to read and which the spellcheck may not handle efficiently. Needless to say, an error on the title page, the first part of the document that readers are likely to look at, is particularly serious in its implications.

The need for consistency

Inconsistency has a similar effect in that it suggests a casual, slipshod approach to the writing. It is usually unimportant whether a writer chooses 's' or 'z' in a word like 'organisation', but a change of mind in the middle of the document undermines the reader's confidence. Even apparently trivial decisions, such as to use the more common 'eg' rather than 'e.g.', must be made consistently, and must be consistent also with one another, so that if 'eg' is used, 'etc' will not have a full stop either. If, as is generally the case nowadays, such expressions are written out in full (in English, as 'for example'), this too must be consistent. Part of the

process of checking is to watch for inconsistency, and, sensibly, to record decisions about usage as they are taken. This is particularly important if the document is produced by a group of people, some of whom might, for example, use the old-fashioned form 'sub-contractors' rather than 'subcontractors'. One member of the group should have editorial responsibility for making such decisions and notifying other writers early in the production of the document; checking will then be made easier.

> Consistency suggests conscientiousness and reassures the reader.

The first stage of checking will always be the duty of the writer. If the text can be left alone for a couple of days, or preferably a week, the author is much more likely to see mistakes than if checking started only five minutes after the printout was produced. Checking is a time-consuming job (lack of time is the most common excuse for not checking), and it is a mistake either to leave insufficient time to be thorough or to assume that a spare hour can be devoted at the end to going through the complete document. The timespan for concentration is short, especially as checking is boring as well as time-consuming, and the writer should take regular short breaks. Even a couple of minutes spent every quarter of an hour in leaning back and looking out of the window will help.

A document should always be checked not only on the screen but also from a printout – a page flat on the desk is even today at a much more normal reading angle than a screen. A helpful technique can be to put a blank piece of paper over the text and reveal one line at a time. It is unlikely that a single line will make complete sense, and so the writer is able to concentrate on the words rather than the meaning. Some mistakes are particularly difficult to see, such as the duplication or omission of a minor word like 'the', or the creation of a word which has the same shape as the word intended, such as 'casual' for 'causal' or 'form' for 'from'.

Computers are a wonderful invention, but they can produce their own problems. Just because it is so easy to correct a mistake, the writer whose inspiration is in full flow will tend to leave the correction until later, when the mistake may be forgotten or much less obvious. A personal marker system will offset this: writers should get into the habit of marking up any questionable text as they go along. Anything that seems suspect, such as a passage that doesn't seem to read well, a question about the evidence presented, a sudden doubt about accuracy, and so on, should be marked up immediately. This could be by using a highlighter function, or just inserting **xxxx**, so that later, when the passage has been completed, it will be easy to identify and amend the doubtful section. Sometimes writers lose confidence a bit when they first use this system, but the feeling doesn't last!

As material is moved around, it may no longer be consistent with what now comes before it, so that a singular subject may end up with a plural verb and so on. The insertion of an extra paragraph will move other material onto different pages, and a heading may be separated from the text to which it refers, or a key word at the end of a sentence may now be on a separate page from its context. The task of checking includes making sure that such irritations have been removed.

For these reasons, the document issued should be in pdf form, to ensure, as far as possible, that it remains in the form that was intended by the writer.

> Use the pdf form for the issued document.

Page layout

Layout on the page can make both reading and checking easier or more difficult. A fully-justified text, in which all lines end at the same point, creating a regular right-hand margin, may look attractive – although opinions vary – but it is harder to read and check than left-only-aligned ('ragged right') text. If numbers are included in a long paragraph, it is particularly important that the eye can move accurately from the end of one line to the beginning of the next, and is not allowed to jump a line.

Choice of font

The font chosen should be simple and undecorated (Times New Roman is popular if a font with serifs is chosen; Arial is a useful sans-serif font). It should also be large enough for ease of reading. On the whole, 12 point is a sensible size, with 1.15 or 1.5 interline spacing; if mathematical material is included, special care should be taken to ensure that superscript and subscript figures do not corrupt the lines of text. In printing an early draft of the document, the writer may choose double spacing in order to have room to make notes at the appropriate point on the printout, but it will be a little harder to read in the finished product.

Line length

Line length should also be checked. Ideally, the number of key strokes to a line of print should be between 80 and 100; if there are more than this, the reader's eyes cannot move easily from the end of one line to the beginning of the next, and the

text will be perceived as heavy to read, although the reader may well not know why this is so.

> Font style and size, and line length, should be chosen for the reader's convenience.

Use of space

The need for space has been stressed several times in this book. The layout of the page should look well spaced, with appropriate gaps between words, lines, paragraphs or sections, and round the edges of the text. Margin space on the left is important so that words or figures are not lost in the binding, and there should be adequate space at the top and bottom of the page. A congested page looks unattractive and heavy, and is unlikely to encourage the reader.

> Leave space on the page to allow the text to stand out clearly.

Title pages

The title page is usually the first page of a document that the reader sees. Title pages give status as well as administrative information. Manuals, instructions, specifications and reports have title pages, which contain standard information: title, author and date. A reference number may also be required, together with the issuing company's logo, name and address. Similar details of the client company for whom the document was produced will be included as appropriate. A statement of confidentiality or copyright information should be shown if it is needed. All these details are often specified in the company's templates, but the individual engineer may be able to ensure that the layout of the title page is uncluttered and gives a professional look to the whole document.

> A well-laid out title page gives a professional appearance to the whole document.

Many reports and similar documents will be photocopied, at least in part. At this stage, the value of numbering the pages is apparent – it is too easy for unnumbered pages to be omitted by accident. Poor quality copying can make figures unclear or ambiguous, and checking one set of copied material is a good idea.

Binding

Binding is the last stage in the completion of documents that are to be circulated in hard copy. The style of binding may be laid down by the company, but the choice should be made in the light of the document's importance, length and longevity. Stapling is inappropriate for all but the shortest in-company documentation: the last page is easily torn off, and the rule seems to apply that the staple itself will go through the most important word on the second page. A slide bar binding, usually chosen by students because it is cheap and can be reused, has the disadvantage that pages will not lie flat on the desk, and the slide bar itself is likely to come off, allowing the pages to fall apart. Spiral bindings are widely used: they will lie flat on the table in use, are secure and on the whole look attractive. They are not sensible for very short or very long reports, and if several documents are kept on a shelf together, the spirals can become entangled. Ring binders are more bulky but useful for material which will have to be updated regularly; they have the associated disadvantage that it is all too easy for people to remove pages or sections without permission.

Other more permanent forms of binding tend to be reserved for major documents which have a long lifespan in printed form, or which are intended primarily to impress a client. Indeed, some documents would benefit from being professionally designed. If the information is to be used commercially, is expensive to obtain or the company's professional image is at stake, it is worth making sure that the cover design is both attractive and effective, so that the document makes the strongest possible impact on the recipient. Major published reports are clearly in this category.

> Both overall design and binding should be appropriate to the impact which the document is intended to make.

Attractive and professional text

However the final document is produced, it should look and feel good in use. In the light of advances in technology, it may seem surprising that this is still so true; we might have been living by now with the paperless office we once expected, so that all documents are held only on computers. In practice, this has not yet happened. Documents are produced and updated by computer and generally transmitted electronically, but they are still occasionally printed out to be read. The impact of a document remains important. It should catch the attention of its readers and users by its attractive appearance, clear helpful format, accuracy of presentation and precise, unambiguous written style. The effect should always

be one of pleasure and reassurance, that time and trouble have been taken to produce a document worthy of its technical content.

> A document should look both attractive and professional;
> it should inspire confidence in its readers.

Summary

- All documents should be checked for factual accuracy.
- Keyboarding errors distort information and undermine credibility.
- All documents should be checked for accuracy of presentation.
- Consistency suggests conscientiousness and reassures the reader.
- Use the pdf form for the issued document.
- Font style and size, and line length, should be chosen for the reader's convenience.
- Leave space on the page to allow the text to stand out clearly.
- A well-laid out title page gives a professional appearance to the whole document.
- Both overall design and binding should be appropriate to the impact which the document is intended to make.
- A document should look both attractive and professional; it should inspire confidence.