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Designing Effective Instructional Brochures for Online Catalogs

Computerized catalogs are becoming a standard feature in libraries today. The question of how extensively computers will, should, or can economically be used will not be answered for a long time, however. Currently online catalogs, material management, billing, interlibrary loans, and, in some places, electronic information services are being installed across the country and, as with all new systems, computerization is creating some problems for users—particularly in how to use the computer to locate materials. The immediate solution to this problem is to provide printed instructional materials for the user.

I have looked at a good sampling of instructional folders for using library computer systems. By and large the content is good and the systems they describe are user friendly. However, there is a common problem with the visual presentation and readability of the information. I would like to show some examples, discuss where problems occur, and then suggest some guidelines for producing more effective literature.

Probably the best solution to the problem of user instruction is to have the computer do the work by displaying step-by-step instructions along with a menu on a touch-sensitive screen. This will not eliminate the need for printed instructions but those that are needed will not be so vital to the system and, therefore, the design demands will be less critical.

Part I—Examination of Brochures

In very general terms, there are two situations that make it difficult to design effective instructional brochures. The first is that most of us have been verbally trained, which means the content and logic of the instruc-

tions can be very good. However, we respond most effectively to instructions which provide strong visual clues. The good, clear, written instructions are only half the battle. There must also be a clear, concise layout and appropriate visual clues for the instructions to be effective.

The second problem of designing instructional material is the overload of advertising materials we are subjected to. Most people—including many designers—are not accustomed to designing informational literature and when asked to do so, tend to “oversell” the information by trying to create visual appeal rather than readability. The opposite reaction—i.e., of trying not to compete with the slick quality and expense of advertising—often hinders quality design by resulting in a simple, straightforward typed list of instructions. In either case, the effectiveness of the instruction for the user is reduced.

In general there are five parts to a brochure: (1) the title page, (2) the library system and logo, (3) a description of the computer system, (4) a step-by-step procedure, and (5) a diagram of the screen with a key to the abbreviations. I will quickly discuss each of these areas and describe how design can help to present the information.

The title page. The major purpose of the title page is to tell what the literature is for and to identify the library. The title should be a major headline—probably near the top of the page—and the library identity should be kept brief and used as a counterpoint to the headline. Subheads may be needed to further explain the major headline and these should be near the major headline yet in a smaller size typeface.

Pictures and other information may be added, but they should not compete with the headline for visual prominence. They may also be difficult to reproduce and, if they are, they may lower the perceived quality of the brochure. The most common problem on a title page is too much information or unnecessary images crowded onto the page. Group the information, leave some white space or blank areas, and exaggerate the contrast between elements. For example, use a large headline with a small subhead.

The library system and logo. The library system name and logo information may be in two parts with a logo or name on the title page and a descriptive paragraph or list on the inside or back cover. Usually there is only one library in town, so there is little need for the name to be conspicuous. It is important, however. A logo is a difficult element to handle. It often seems to pop out on a page and not relate well to the layout. Avoid making it too large or crowding it close to other elements. A logo is a separate design statement and needs some white space to fit well on the page.

Description of the computer system. The description of the computer system is usually a statement of what the computer can do for the library

patrons. Commonly it is the best handled area of a brochure as it is the most verbal and least visual part. Short statements with clear headings are the most effective. It is easy to try to spice up the look of this information by using colored inks and decorative type styles. These often have a tendency to reduce legibility, however. By thinking of the description as text copy—as in a book—the urge to overdo can be curbed.

Step-by-step procedures. Laying out step-by-step procedures is the most difficult design problem in an informational brochure. Eye movement from the screen, to the brochure, to the keyboard is rapid and easily frustrated by instructions that are difficult to read, in a bad position, too large or small, or of a distracting color. Avoid overwriting instructions or giving too much verbal information. Do not use too many lines to “organize” each step of the instructions. Give visual clues to what actions are required by the user. Make the brochure a size that is easy to put by the computer terminal. Finally, do not try to emphasize too much as that dilutes the purpose of the instructions.

Diagram of the screen with a list of abbreviations. This is often a minor element on a brochure, but does require some care. The description of what appears on the screen should be short and concise. However, do not set the type in very short lines as they are difficult to read. Locate the information close to what it describes, yet clearly separate it from the diagram. If the information is reproduced exactly as it appears on the CRT screen, it may need some enhancement such as highlights or arrows to indicate which element is being described. Rather than producing an exact reproduction of the screen, replace all the words with typeset words while maintaining the same size and positioning to improve legibility.

Overall, the quality of the written information in library online catalog brochures is very good and the concern for clarity is evident. There is little problem with the ideas for presenting information and instructions. The problems arise only in the execution of the design. The following guidelines should help focus on specific design issues to help present material well.

Part II—Guidelines for Design

After examining several brochures we have a general idea of the design issues involved. The following nine categories can serve as a checklist for designing or evaluating an informational brochure. Within each category are suggestions and guidelines to consider.

Budget and production method. The money available for a project varies greatly from library to library. Some were produced for next to nothing and some cost hundreds of dollars. The cost of any printed piece can be broken down into three areas: design, preparation of art, and

printing. Because of the nature of these pieces, the printing costs—which are usually the greatest of the three—can be kept fairly low. One way to think of printing costs is to consider the number of operations done to the paper. One sheet of paper printed in black ink on both sides and folded is basic and inexpensive. By adding another color ink, higher quality paper, or another page, the cost will go up. Since there is little need for elaborate printing, more effort and money can be put into the design and preparation of art.

Perhaps the best way to handle the artwork is to suggest to a printer or graphic artist what you want done and let that person prepare the art. Be sure to have the artist accurately sketch the designs before making finished art and carefully discuss these sketches. Changes are easily and inexpensively made at this stage. Later changes in the production of art can be expensive. Also, keep the artwork simple. Try to eliminate photographs. Use simple line drawings or diagrams instead. If a typewriter is used for the type, remember that cutting and pasting the copy will get the layout exact before it is printed.

Printing process. There are essentially two types of reproductive methods available: offset printing, or one of a variety of quick-copy techniques. Offset printing will give very accurate, high quality reproductions and is cost effective on production runs of 100 copies or more. Quick-copy techniques usually produce a lower quality copy and are limited in their ability to reproduce photographs, fine detail, or large areas of ink. They are cost effective for simple, short runs of 100 or fewer copies. Both methods require the same careful design and art preparation. The better the art quality the better the reproduction will be.

Paper choice. There are a great variety of papers available for printing. What is required for a simple brochure is an inexpensive bond paper. It comes in many standard colors, weights, and finishes. A printer can give advice on the selection. Look for a light neutral color that shows good contrast with the ink (black). White is fine, but a buff, beige, or light grey is easier on the eyes. Avoid a very bright color like canary yellow, as it is difficult for the eye to adjust to; or a dark color like royal blue, as it creates a low contrast with the ink and is difficult to read quickly. The weight of the paper should be such that there is little or no show-through from the other side. Little show-through means that printing on the reverse will not show through and distract the reader. The finish on the paper should be matte since gloss finish is difficult to read.

Size and use. The size and shape of the brochure is important not only for printing costs but also for the intended use. In terms of printing, standard paper sizes are the least expensive (e.g., 8 1/2 inches x 11 inches, 9 inches x 12 inches, 8 1/2 inches x 14 inches, 11 inches x 14 inches). However, the brochures' intended use may demand other paper sizes or

folded sizes. Questions such as where the piece will be placed; visibility; difficulty in switching eyes from the screen, to the keys, to the instructions; and placement to facilitate note taking will all affect the size and shape requirements. Generally speaking, a narrow, horizontal rectangle with the instructions listed vertically is the easiest to position and read. An 8 1/2 inch x 11 inch sheet, then, is too large and must be folded or cut when it is used.

Layout, grids, and sequence of information. The sequence of information is really an editorial job of grouping similar information and ordering these groups into a logical sequence. For design, then, groups of information are important. They can be seen as blocks of texture which must be laid out to form the composition and to create a logical pattern.

A grid is an organizational device used to give a sense of order to a layout composed of different size and shape elements. The grid helps to establish margins, spacing, and pattern. To use a grid, first determine where any folds will be then set margins at the edges of the paper and along the fold(s). The interior spaces can then be used for layout or broken into two or more vertical columns and divided horizontally into rows. When type or images are put down they can be made to fit these grid lines.

In the overall layout, aim for a sense of balance between elements. For instance, a large title needs to be balanced against some blank space or by a visual texture block such as written copy or an image. Instructions should be closely sequenced and in order but separated by blank space or a change in texture from other information. A term to remember to remind you to balance a composition with blank space is *horror vacui* (fear of open spaces), a common malady among novice designers.

Typography. The choice and use of typography is perhaps the most important element. There are four characteristics of type that you will wish to control very carefully: style, format, setting, and size or texture.

Type or letter forms can be divided into three general categories or *style*. Serif type is a combination of thick and thin strokes as well as little flairs or serifs at the end of each stroke. Serif typefaces are usually considered traditional and are the most legible for body copy. The second category is sans serif. These typefaces are characterized by uniform line widths and an absence of serifs. They may be used for copy but legibility suffers. The third category is decorative type. These styles vary widely and are usually characterized by very evident visual themes that are carried on through their particular alphabets. Decorative faces are reserved for headlines or display copy, but are difficult or nearly impossible to read in body copy. The following is a list of serif and sans serif typefaces considered "classic" body types.

Serif: Baskerville

Bodoni

Caslon

Century

Clarendon

Cooper

Garamond

Korinna

Melior

Palatino

Optima

Times Roman

Souvenir

Sans Serif: Avant Garde

Gill

Helvetica

Kabel

Univers

Antikva Grotesk

Since we recognize and read words by the visual pattern that forms them, the more distinctive the pattern of the individual letterforms that make up the words the easier they are to read. By examining three distinctly different letterforms in a given typeface—the *A*, *H*, and *O*—shows what the range of form in the typeface will be. In a good, readable typeface, the *A* should form a distinct triangle; the *H* should fit in a squared rectangle; and the *O* in a circle. If the letterforms all reflect one shape—e.g., Microgramma, which is based on the square—the typeface will be difficult to read.

Format refers to how the type is arranged on a page. There are many ways to lay out type and some that are familiar from books and advertising that are not appropriate for instructions. Reading phrases rather than complete sentences or paragraphs is quicker and easier and more appropriate for brochure information, when the image created by the language is not important. Arranging the type flush to the left margin and not flush to the right margin makes short sentences and phrases easier to read. This is called flush left/ragged right. Centered type and headlines are also difficult to read. A line length of two-and-one-half alphabets (the amount of space required to set the typeface from *A* to *Z* through two-and-one-half runs through the alphabet) is optimal reading length in a book. Make this the longest line length for step-by-step instructions.

Type may be set in a wide variety of sizes with different leadings or line spaces. Eight, nine, ten, and twelve points are the four most common sizes for reading type. There are 72 points to the inch. Of these the two larger, 10- and 12-point, are good sizes for instructions. Most books are set in 8-, 9-, or 10-point type. The space left between lines is also important for legibility. Generally, the larger the type the greater the space between lines. Ten-point type with a three-point leading would be appropriate for a list. The leading may be increased slightly for instructions where frequent referral is made. Single-spaced typewriter copy is approximately 9-point type with a

5-point leading. Typescript copy is more difficult to read than typeset copy primarily because of the equal spacing between letters and the generous spacing between lines. Another aspect of setting type that improves legibility is using lowercase letters rather than all capitals. The greater variations in letterform of the lowercase letters make word and phrase patterns more easily and quickly read. Short headlines may be set in all caps, but even they are more difficult to read than those set in upper- and lowercase letters.

Type can be used to give visual organization to the entire brochure. Once type is set it creates a block of texture that is seen as one unit or group of information. By organizing different kinds of information into different textural blocks, it is easier to scan through printed text for the desired information. There is also the opportunity to create a more interesting visual design without adding unnecessary and often distracting decorative elements.

There are many ways to manipulate the texture of type without changing its basic format. For example, choose a type style or family—e.g., Helvetica—and have it set flush left, ragged right on a two-and-a-half-inch line length. You may even specify the size and line spacing—e.g., 9-point type with a 2-point leading. There are still many variables with which to deal. Helvetica comes in a light, medium, or heavy line width in standard or italic style and expanded or condensed form. It can also be printed in different colors. Excluding the color option, there are over fifteen different textures that can be created with Helvetica, all set in the same basic format. This allows using the same type style throughout a piece of literature for consistency and legibility while retaining a great deal of design freedom for emphasis, organization, and visual appeal. A general rule-of-thumb for publication design is to use one type family throughout. If types are to be changed, however, use something very different. For example, if Helvetica is used as the basic type and a different style is desired for a headline, use a serif face like Garamond or a decorative face like Microgramma rather than another sans serif face. Also try to avoid using more than three different typefaces on any printed item. This includes the type used for the library logo or name.

An aspect of type size that is related to composition is contrast. It is desirable to create a good contrast between headlines and body copy. The two easiest ways are to exaggerate the size of the headlines—as magazines do—or to give empty or white space to the headline so it is set apart from the copy. A composition that contains some contrast either in type size or use of space will be visually more interesting and easier to read.

Writing may be considered abstract visual symbols. The most efficient communication of information without much emotional content uses short phrases and pictographs or symbols. For instructions, a short one-line phrase with a diagram or pictograph of the specific subject and

perhaps an arrow or other symbol indicating the action makes for quick, accurate communication. The more abstract a pictograph symbol becomes the more emotive qualities it contains and the less specific its meaning. A good pictograph should closely represent its subject, be self-contained or enclosed in a basic shape, and have an equal balance of white and black (printed areas). In terms of layout, try not to scatter pictographs or other symbols throughout the copy. Scattered pictographs or symbols demand too much eye movement. By consistently grouping symbols or pictographs toward the end of a phrase, they will be easier to refer to.

Numbering, lists, and other reference clues are like symbols but are used in a more rigid or formal way. Usually they are sequential and should be positioned flush left and only slightly spaced from the copy. You are all familiar with spreadsheets that have a list that is flush to the left margin and data flush to the right margin. These sheets are difficult to refer to and you must follow with your finger to coordinate information. By keeping material flush left—but not necessarily to the margins—lists are easier to refer to.

A final design guideline concerns the use of organizational devices such as lines, boxes, and borders. Try to avoid them whenever you can. The reason is that they are so easily over—and badly—used. If you try to eliminate them the chances for abuse are reduced.

One of the most common abuses is to grid out, or box in, information on a spreadsheet. Putting each piece of information in its own box is the same as not putting any lines on at all; and the organization of information by subgroups is not improved. Consider using only horizontal lines to focus on strips of related information and let the columns of type create the implied vertical lines. If horizontal lines do not seem right, perhaps the layout for that particular information is wrong.

Decorative borders are another weak spot in many designs. If you think you need a border, chances are that the text does not look right with the layout. Rather than trying to correct the problem with borders, try manipulating the layout. Let the margins create the border and use lines for organization and emphasis.

There are many things to consider when designing a printed piece. Keeping in mind that the purpose of the brochure is to inform and not advertise will help and following basic rules of legibility and organization will improve effectiveness. This does not mean an informational brochure cannot be attractive. Rather, the ways to develop an attractive brochure are by carefully manipulating the type, space, and organizational devices. Adding decorative elements should be unnecessary. Whether using a typewriter or a printing press, carefully question and design the text, typeface, pictographs and symbols, and layout. These design principles are the best guides for producing effective instructional brochures.

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