

Memo

To: Dr. Karen Kuralt
From: Stephanie Williams
Date: July 2, 2018
Re: Design Memo for Portfolio Project 3 – Redesigned Safety Manual

Introduction and Purpose

Portfolio Project 3 is a formatted and redesigned safety manual. One of our weekend projects for this course was to practice formatting and designing a multi-page document by formatting a university safety manual. We were given specific requirements that our design should satisfy – for example, a cover page and table of contents – while creating a document that allowed for quick reference and appropriately represented the organization.

The purpose of a safety manual is not to be read word-for-word, cover-to-cover. Rather, the manual should serve as an easy-to-use reference guide, one in which users can quickly find and understand the information they need when circumstances arise. This particular safety manual is for the Institute for Genomic Biology (“IGB”) at University of Illinois – Urbana-Champaign (“UIUC” or the “University”). The University, like many organizations, has very specific branding and publication requirements to ensure continuity and consistency in university-related materials.

Description of the Users/Readers and Context

The IGB manual is a compilation of rules and procedures for faculty, staff, and students working or otherwise involved in activities in the IGB lab(s). These users/readers need to readily understand what the manual is and how to use it, and that use may often occur in emergency or high-stress situations. Thus, the format of the manual must be intuitive such that users can quickly flip to needed content and follow included instructions.

Description of the Client and Design Constraints

Because the IGB is affiliated with UIUC, any of its materials should adhere to the branding guidelines set forth by the University. Further, though the safety manual is not likely something to be mass produced, the IGB will no doubt want multiple copies printed and bound for convenient reference around the facility. Thus, ultimate design should not lead to exorbitant printing costs.

Design Evolution and Rationale

Accompanying the final redesign that is Portfolio Project 3 are two early versions, the first of which I submitted for a weekend design project. For point of reference, I include the Weekend Design Project Format a Safety Manual Assignment Instructions and the original text of the safety manual along with the early versions and final redesign. The following table provides a quick view of design changes I made (rationale for these changes will be discussed further below):

<u>VERSION</u>	<u>TYPOGRAPHY</u>	<u>VISUALS</u>	<u>LAYOUT</u>
Original	Arial regular 12pt, no distinction between headings, subheadings, and body	Forms in appendix	Full page; single-spaced with extra spacing between paragraphs; left-aligned-jagged text
Early Draft 1 (submitted as weekend project design)	Applied brand fonts – Univers 14pt bold red to headings; Univers 12pt bold dark blue to subheadings; Garamond 12pt regular to body	Added cover page with shapes and image; converted several appendices to images for ease of size/positioning; converted some text to tables	Adjusted line spacing between headings, subheadings, and text; created table of contents; added header/footer; added page numbers
Early Draft 2	Altered typography on table of contents (removed caps and small caps)	Corrected error in shape on cover (removed white gap/line at bottom)	Changed layout of portion of main body to two-column format with justified alignment
Portfolio Project 3	No additional changes	No additional changes	Revised to two-column layout to cover entire body of manual; changed appendices headings/page alignments; altered page numbering

I'll now detail the elements more specifically:

Media choice (types of paper, print vs. online, etc.) and Size

I used Microsoft Word to create this Portfolio Project 3 as a print manual. I used mirror margins and side-by-side view to ensure proper alignments and viewing in a book format. The final redesign is 40 pages plus a cover and is formatted to be printed front-and-back. Ideally, it should be printed on heavier stock and/or with a protective covering on its pages to prevent the pages from being obscured or destroyed during lab mishaps. Further, the appendices have been set up such that they could easily be copied for display on bulletin boards and/or lab walls.

Use of Color, Graphics, and Typography - Branding

As I have mentioned in previous design memos, "Teaching Text Design"¹ discusses creating a typeset look through proportional fonts and spacing and creating a feel of consistency through the use of typestyle. I researched UIUC to find out if it had any branding guidelines, particularly related to typography and colors readily available on the web.

The University colors are a deep blue and reddish pink. I used the RGB codes for each to create custom colors in Microsoft Word (deep blue: RGB 19/41/75; reddish-pink: RGB 232/74/39)². I then used both colors as accents on the cover page; the reddish pink color as major headings on the Table of Contents and throughout the manual; and the deep blue as subheadings throughout the manual.

Recommended typefaces for University materials include Garamond and Univers.³ I used Garamond for the primary body text font, in standard 12-point size, and Univers for the headings and subheadings, 16- and 12-point sizes respectively.

I also spent some time perusing the IGB website⁴, which is where I got the picture of the facility for the cover.

Using the school colors and acceptable typefaces, along with the picture of the facility, I believe I created a manual visually connected to the organization's identity. The table of contents ties to the manual through the use of same-colored headings and the larger

¹ Kramer, Robert, and Stephen A. Bernhardt. "Teaching Text Design." *Technical Communication Quarterly*, vol. 5, no. 1, 1996, pp. 35-60.

² <http://creativeservices.illinois.edu/brand/logos-and-colors.html>

³ <http://identitystandards.illinois.edu/graphicstandardsmanual/generalguidelines/typefaces.html>: This page appears to be slightly outdated, as it directs viewers to the above Creative Services page for information about brand guidelines. However, that site didn't have typeface info readily available (it provided a link to download a full guide, which I was unable to acquire).

⁴ <https://www.igb.illinois.edu/>

type size of those headings throughout the manual; and, coupled with adequate line spacing between sections, this should allow for quick reference. In an earlier draft, I wasn't completely happy with how the TOC treated the subheadings (small caps), so I modified to title case for the final design.

I considered not using so much color throughout – thinking about printing costs – but determined that, though there will need to be several copies of this manual available at the facility, it will not be mass-produced so the color printing shouldn't be cost-prohibitive.

Arrangement of Elements

I used Word's cover page and table of contents features to create those elements. Doing so allowed me to easily establish the header/footer/page number on the primary text of the manual. Creating the appendices footers was a little more challenging, requiring me to insert section breaks before each one. Ultimately, I didn't like how the automatic TOC feature treated the appendices; so, I deleted them from the list and created my own table to insert.

In my initial draft (the one I submitted for the weekend project), I focused heavily on color and typography, while ensuring I formatted the table of contents according to assignment guidelines. I used tables and bullets to create easy-to-see spots of important information. Peer feedback complimented my design for incorporating brand identity well with clear organization.

But I knew I didn't spend much time on the individual page designs; so, I undertook to correct that with the final redesign. We've learned that physical design is extremely important when users need to be able to find information quickly. In Saul Carliner's "Three-Part Framework,"⁵ he details how layout, type, headings, and white space, can help or hinder the user's experience with the page. "Teaching Text Design" talks about viewing the page as a grid and how shorter line lengths make important content easier to digest. *Document Design: A Guide for Technical Communicators'* chapter on pages⁶ illustrates how users engage with pages: skimming, scanning or reading. When users need to find information quickly and easily, the page should be scannable. Further, we as page designers must consider the sequence in which users view objects on the page, generally in a left-to-right z-pattern. To make the page more scannable, with easily-digestible content, and intuitive sequence, I applied a two-column structure to the main manual text in the final redesign of Portfolio Project 3.

⁵ Carliner, Saul. "Physical, Cognitive, and Affective: A Three-Part Framework for Information Design." *Technical Communication*, fourth quarter 2000, pp. 561-576.

⁶ Kimball, Miles and Ann Hawkins. "Pages." *Document Design: A Guide for Technical Communicators*, Bedford/St. Martin's, 2008, pp. 114-150.

In an earlier version, I ran into an issue with getting the forms of the appendices to fit when I wanted to add header/footer and headings. So, I screenshotted them and converted the forms to photos that could be inserted and easily resized without cutting off information. For the final redesign, I changed how the appendices were identified (creating a cover/section page for each new appendix) and made the contents of each full page so that the forms/charts/guidelines could be easily copied/printed for handout or display.

Design Assessment

I really enjoyed working on this safety manual project. I mentioned in the discussion posting that accompanied my initial design that I didn't think it was as hard as some of the others we've done – like the logotypes or even the infographic design. Formatting such a large document is certainly tedious, and the technology can be frustrating. For instance, in my final design, page numbers begin at the bottom of the first page of content, the page following the table of contents. However, the page number starts at 3 rather than 1. I don't think I could sufficiently convey how much irritation that one little detail caused me. The first page of manual content should be marked as page 1. I tried so many "fixes" to alter the 3 to the 1 (the 'simple fix' of formatting the page number to start at 1 "simply" did not work). If I had more time (and patience), I'd continue to search online help until I remedied the issue. All in all, I don't think it's a major design error, but it sure does bug me.