Chapter 4

Pre-Production Process

Introduction

The pre-production phase of the web design process involves gathering information from the client, determining the goal of the website, surveying competitors’ sites, and presenting the client with mock-ups of the website. In this chapter, you conduct a competition survey and create mock-ups for the website of an established company. Also in this chapter, you create a flowchart for the course project.

Focus Questions

1. What is the purpose of the brainstorming session?

2. What are some of the best ways to back up files and assets?

3. What should be considered when determining the scope of a site?

4. What should be the main goal of your work on your client’s website?

5. What is information architecture?

6. What is contained in a requirements document?

7. What does a web master do?
8. What should you do before meeting with a client for the first time?

9. What kind of assets will you need from the client?

10. What is the naming convention for the home page?
Discovery Exercises

Competition Survey

You are designing a website for an online bookstore. You need to conduct a survey of the client’s competition. Find three online bookstores or go to www.amazon.com, www.bn.com, and www.borders.com.

1. What do all these sites have in common?

2. What are some unique features of each?
   
   Site 1:
   
   Site 2:
   
   Site 3:

3. Which features would you incorporate into an online bookstore?

Mock-Ups

Think about how companies use design. Are there companies that immediately come to mind? Coca-Cola, McDonalds, and Nike are just some of the companies whose use of design is so successful that we associate colors or symbols with them. What would happen if Coca-Cola switched colors from red and white to blue and white? Would we instantly recognize a coke can or advertisement? Probably not. The same is true for the golden arches of McDonalds or Nike’s swoosh.

Although it is important for companies to maintain the key components of their designs which are recognizable, they continually update their designs. Coca-Cola, for example, is continually revising its packaging and advertising designs. To determine the new look, companies prepare several design possibilities, called mock-ups.
Select a product or company (choose your own or use Coca-Cola) and create two new designs, mock-ups, for the home page of a website that incorporates the important elements of that company such as color, logos, and other visual elements. You can either make a sketch of your mock-ups in this workbook or use Adobe Photoshop or Adobe Illustrator to create digital mock-ups.

**First Mock-Up**

Company name: ________________________________
Second Mock-Up

Company name: ____________________________________________
Lab 4.1: Creating a Flowchart

Part I: Formulating the Outline

One of the first things to consider when getting ready to assemble a requirements document is how the various parts will fit together. That is, a cohesive, organized structure must be laid in place before the requirements document can be realized and drawn up. One of the best ways to ensure that the project will be organized from the first step is to build an outline.

There are five basic steps in building such an outline:

1. Make a wish list. During the concept stage, when you do your initial planning with your client(s) and your partner(s), jot down a wish list of all the content that the site will include. This gives you an idea of the size and scope of the project.

In this lab, you use the course project to create a flowchart.

During the brainstorming session for the Washington High School website, the following ideas were gathered:

- Place for information regarding upcoming athletic events
- Latest news stories
- A way to communicate with teachers
- Alumni—reunions
- Alumni list
- Special programs in the curriculum
- Calendar of school events
- Important old news stories
- A form for users to contact web designers
- Classes offered at Washington High

2. Organize the content into groups. From the wish list, you can begin to organize the content into logical groups. For example, from the wish list we might be able to discern specific groups of content: information, activities, programs, and contact. Organize the wish list into categories for the Washington High School website.

3. Create categories from the groups. After you have a few groups of content, you will begin to see a pattern emerging. Some groups are similar so you can lump them together into larger categories. Other groups might need to be more clearly defined so they may be split apart. The key to developing a successful site plan is precision. Try to identify the smallest number of distinct categories that will still meet your client’s needs. For the Washington High School website, five specific categories exist: News, Calendar, Curriculum, Alumni, and Contacts.
Compare your categorization with the following categories and subcategories:

- **News**
  - Current
  - Archived
- **Calendar**
  - School
  - Athletic
- **Curriculum**
  - Programs
  - Special programs
- **Alumni**
  - News
  - List
- **Contacts**
  - Teacher list
  - Contact form

4. Build the outline. As you can see in Step 3, the outline practically builds itself. The categories become the main ideas. Below the categories are any subcategories, and within those subcategories are lists of content. Generally, the lists of content are the pages that will require the most regular updating.

5. Make a quick sketch of the site flowchart. Based on the outline you have conceived, create a flowchart of the website. You can create it in a word-processing or spreadsheet program or even sketch it on paper. Though you might revise the site flowchart later in the pre-production process (see Part II of this lab), the visual prediction of the site’s structure is a handy guide to follow as you develop the requirements document.

![Diagram of Website Structure](image)

**Part II: Formulating the Requirements Document**

The flowchart you created in Part I lays out the proposed site in big chunks. The requirements document, which you formulate in this part of the lab, breaks those chunks into their component pieces.

Before compiling the requirements document for the Washington High School website, the answers to these questions should be determined:

- Who will be the Washington High School contacts to provide updated information to the web designer?
- For each of the categories established in the outline, how often will the high school expect information to be updated?
• What kinds of resources (hardware and software) must the school provide to make sure the updating can be done on a regular basis?

• What are the daily/weekly/monthly/bi-yearly tasks the web designer needs to accomplish?

After these questions are considered and answers are delivered, a more formal list of tasks, assets, and requirements that are required to construct the site can be laid out. You can create a table similar to Table 4-1 to list essential site requirements:

**Table 4-1: Requirements Document**

<table>
<thead>
<tr>
<th>Job Description</th>
<th>Materials</th>
<th>Details</th>
<th>Assigned to/Update Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Layout of site, beginning with functional mock-up</td>
<td>Apply school colors to mock-up. Include school logo. Create new navigation scheme with five color schemes and icons.</td>
<td>Make sure color scheme is web-safe. Plan navigation three ways. - Navigation bar - Econ - Text equivalent</td>
<td>Design team/updated yearly</td>
</tr>
<tr>
<td>Create school logo graphic.</td>
<td>Use Adobe Illustrator for creation. Convert to GIF.</td>
<td>Design to run alongside WHS headline on all pages.</td>
<td>Design team</td>
</tr>
<tr>
<td>Decide on school color-compliant color scheme.</td>
<td>Create color palette in Photoshop.</td>
<td>Color scheme will remain consistent over all pages.</td>
<td>Design team</td>
</tr>
<tr>
<td>Create five icons to correspond to five agreed-on categories in initial outline.</td>
<td>Use Photoshop and ImageReady to create mouseover and mouseout states.</td>
<td>Create GIFs for mouseover and mouseout button states for icons (icon + Alt tags).</td>
<td>Design team</td>
</tr>
<tr>
<td>Create navigation bar to correspond to icons above.</td>
<td>Create GIFs for mouseover and mouseout button states for navigation (navigation + Alt tags) bar.</td>
<td>Design team</td>
<td></td>
</tr>
<tr>
<td>Job</td>
<td>Materials</td>
<td>Details</td>
<td>Assigned to/ Update Schedule</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>• Style guide</td>
<td>• Style guide elements (will be joined in style guide):</td>
<td>• Consolidate details from items above.</td>
<td>• Design team</td>
</tr>
<tr>
<td>- Icon logo</td>
<td>- Data about color values</td>
<td>• Include Cascading Style Sheet to accommodate repeating text elements.</td>
<td></td>
</tr>
<tr>
<td>- School colors</td>
<td>- Typeface sizes/styles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Color scheme</td>
<td>- Logo in color/black &amp; white</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Typefaces</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Collect one current news article.</td>
<td>• Use article from current edition of newspaper.</td>
<td>• Article may need to be shortened to four paragraphs for website.</td>
<td>• Writing team; consult newspaper editors.</td>
</tr>
<tr>
<td>• Collect photo for current article.</td>
<td>• Get digital photo from newspaper or scan original if necessary.</td>
<td>• Photo needs to be optimized, edited, cropped, and saved as JPEG to fit into article page (&lt; 65K).</td>
<td>• Design team and newspaper staff</td>
</tr>
<tr>
<td>• Collect two articles for archive section.</td>
<td>• Use articles from previous edition of newspaper.</td>
<td>• Articles need to be shortened to four paragraphs for website.</td>
<td>• Writing team; consult newspaper editors.</td>
</tr>
<tr>
<td>• Collect photos for two archive articles.</td>
<td>• Get digital photo from newspaper or scan original if necessary.</td>
<td>• Two articles (archive 1 and archive 2 pages)</td>
<td>• Update with “current news” articles.</td>
</tr>
<tr>
<td>• Write up calendar for school events in current month.</td>
<td>• List of events in current month</td>
<td>• Create an HTML table to display calendar.</td>
<td>• Writing team; consult vice principal for student activities.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Update monthly.</td>
</tr>
<tr>
<td>Job</td>
<td>Materials</td>
<td>Details</td>
<td>Assigned to/ Update Schedule</td>
</tr>
<tr>
<td>-----</td>
<td>-----------</td>
<td>---------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>• Write up calendar for athletic events in current month.</td>
<td>• List of events in current month</td>
<td>• Create an HTML table to display calendar.</td>
<td>• Writing team; consult athletic director for student activities. • Update monthly.</td>
</tr>
<tr>
<td>• Create alumni list for year 2001.</td>
<td>• Get word-processed list to save time.</td>
<td>• Implement mailto: tags.</td>
<td>• Writing team; consult alumni contact at school. • Compile annually; update biannually.</td>
</tr>
<tr>
<td>• Write article about alumni activities.</td>
<td>• Limit to four paragraphs.</td>
<td>• Create HTML page.</td>
<td>• Writing team; consult contact at school. • Update according to alumni meetings.</td>
</tr>
<tr>
<td>• Create list of program of studies.</td>
<td>• List of class/course name</td>
<td>• Create HTML page.</td>
<td>• Writing team; consult vice principal for curriculum. • Update each semester.</td>
</tr>
<tr>
<td>• Create list of special programs.</td>
<td>• List of class/course names</td>
<td>• Create HTML pages.</td>
<td>• Writing team; consult special programs teacher. • Update each semester.</td>
</tr>
<tr>
<td>• Create list of staff sorted by faculty (list of phone, address, e-mail of staff members).</td>
<td>• List of teachers, word-processed or text-only with e-mail links and phone numbers</td>
<td>• Implement mailto: tags.</td>
<td>• Writing team; consult principal. • Compile annually; update as needed.</td>
</tr>
<tr>
<td>• Create contact form with text fields, check boxes, and radio buttons (used to contact school staff about grants, documentation requests, and the like).</td>
<td></td>
<td>• Include JavaScript script to evaluate form.</td>
<td>• Program team. • Check at least twice a week for messages; respond within 24 hours.</td>
</tr>
</tbody>
</table>
Here’s how to make GoLive build the site’s flowchart:

1. Double-click the website icon of the completed Washington High School website.

2. After GoLive is launched with the Washington High School website, click the Navigation View button.

3. A new window opens with the Navigation tab selected.

4. Click the Maximize button at the top of the window, and scroll through the page to see that the structure of the construction and navigation of the site is pictured as you had planned it.

5. Select the Page Setup window from the File menu and select Portrait. You ensure that this orientation is selected because the flowchart is displayed vertically.
6. Select File, Print to print your flowchart. It might be helpful to print your chart with the branches of your site collapsed, like this.
Of course, you can expand all the branches of the site and print its flowchart on two pages, as shown here.

In this lab, you considered your site’s features and functions carefully, and now the requirements document and site plan will help guide you and your client, Washington High School, to a useful and functional web presence.
Check Your Understanding

1. What is the correct sequence of the pre-production phase?
   A. Proposal development, brainstorming session, contract negotiation
   B. Brainstorming session, proposal development, contract negotiation
   C. Contract negotiation, proposal development, brainstorming session
   D. Proposal development, contract negotiation, brainstorming session

2. Which of the following should you do when working with clients?
   A. Prepare for meetings.
   B. Listen to the client.
   C. Show enthusiasm for the project.
   D. All of the above.

3. You should let the client know from the beginning of the process that his or her input is essential for the project to succeed.
   A. True
   B. False

4. When creating a website, who is the most important member of the project team?
   A. Project manager
   B. Web designer
   C. Client
   D. No one

5. What is one of the determining factors in the scope of a website?
   A. The designer's newest design tool
   B. Features of the WYSIWYG editor
   C. The length of the domain name
   D. Client’s budget constraints

6. Which of the following determines how a user can find and access information?
   A. Requirements document
   B. Task sequencing
   C. Scope definition
   D. Information architecture

7. Media files (for example, GIF, JPEG, SWF) are embedded within HTML pages appearing as graphics, animations, and videos.
   A. True
   B. False
8. What is information architecture?
   A. A content update plan
   B. A database-driven website
   C. Your client’s marketing collateral
   D. The organization of content

9. What is a dynamic website?
   A. Database-driven
   B. Full of animations
   C. Updated content
   D. Uses the latest technology

10. Which document would provide an opportunity for you to get your client’s signature?
    A. Site flowchart
    B. Information architecture
    C. Requirements document
    D. Cost estimate

11. The web designer assesses the needs of the client during the proposal.
    A. True
    B. False

12. Which phase includes interviewing the client and preparing a proposal?
    A. Pre-production
    B. Production
    C. Post-production
    D. None of the above

13. What is the most viable method of media storage?
    A. CD-ROM
    B. Zip disk
    C. Hard drive
    D. All of the above

14. How your client defines the audience of the website will not have a significant impact on how you design.
    A. True
    B. False
15. What is the scheduling tool that identifies and documents the interactivity dependencies?
   A. Task sequencing
   B. Vision statement
   C. Scope planning
   D. Resource planning

16. You need to determine the time and budget constraints of the client during the pre-production phase.
   A. True
   B. False

17. Which of the following includes a list of what the client needs to provide a web designer and a detailed, revised flowchart?
   A. Site flowchart
   B. Scope definition
   C. Proposal
   D. Requirements document

18. Researching the client’s business, explaining the design process, and showing enthusiasm are all examples of which of the following?
   A. Audience definition
   B. Project management
   C. File management
   D. Client management

19. Audio obtained from the client can be converted to formats that you can use for the web using a sound card and an audio-editing program.
   A. True
   B. False

20. Which of the following are types of files that you can edit within Adobe GoLive?
   A. SWF and AVI
   B. SWF and WAV
   C. PSD and LIV
   D. AVI and WAV