WEB DESIGN WORKFLOW

Project Organization & Management

featuring

FOOD.COMmmm

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SESSION OUTLINE

Managing Expectations: The Project Manager/Producer

Whether you are managing an internal site, or building a new site from scratch, one thing remains as a key responsibility — managing expectations for an external or internal "client." This client must understand not only the fundamentals of building a Web site, but must also understand how each choice and decision that is made impacts both scope and budget of the project. By understanding the core elements of process which go into creating a Web presence, both the client and the project manager can utilize resources adequately and effectively.

Your Role as an Educator

From start to finish, the first job of a good producer is to find out what the actual needs are for the site and to educate the client as to how much technology and development time is appropriate to meet these goals within a specific budget or time frame. The client often has unrealistic expectations of what can be implemented into a basic Web site, as well as a lack of understanding of how much the individual "bells and whistles" cost. After a comprehensive survey **(4.1)** and careful analysis of what elements the client truly needs to execute his/her goals, it is important to help the client understand not only the cost factors, but the eventual impact on the user.

"Scope Creep"

Scope creep is the almost inevitable migration of a Web site from a simple, comprehensible project to a quickly out-of-control nightmare. It is a great term for clients who don't realize the ramifications of individual changes and teeny modifications, which can lead to budgetary increases and time delays. The potential problem is that it all happens in such a subtle manner, you seldom realize it is happening! Something to watch out for in today's sneaky Web development world.

Today's Web Site Development

We can organize and define Web site development in a number of ways, and categorize the site based on content, audience, goals and functionality. To generalize site development into three main categories for the purposes of this session, they are defined as follows:

Design Development
Redesign Development
Intranet Development

These sites can further be defined by content (marketing, informational, e-commerce, entertainment, design oriented, etc.) as well as by size and scope. No matter what the type of site or the scope of the site, the 'core elements' of process remain the same. Approaching your project in an organized and comprehensive manner will save time, budget and headaches along the way.
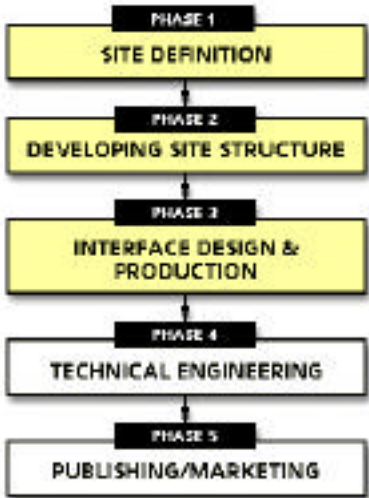
Communication is Key

It is important that all members of the 'team' (including the client) are on the 'same page' at the same time during every phase of the project. There are numerous steps which can be taken to help a project through from start to finish; the suggestions in this handout are only a framework for you to add to while you develop your own internal systems of process to fit the needs of your organization and individual style of management.

Information Design & User Testing a Priority

Web sites must be visually appealing while providing a positive user experience. It is not enough to design a pretty interface, Web site design must also be smart. Smart means providing clear functionality, fast downloading and intuitive navigation. Testing your site at various stages in the process is not only important, it is imperative to the success of your end product. User Testing includes formal and informal one-on-one usability testing, surveys and focus groups.

PHASES OF DEVELOPMENT

In this session, we will cover the five phases of Web development shown below. Although each Web project differs in size, functionality, and content, this basic structure is a good roadmap to follow. The breakdown of process for each phase shown here will be outlined in detail during the presentation.

PHASE 1
SITE DEFINITION

PHASE 2
DEVELOPING SITE STRUCTURE

PHASE 3
INTERFACE DESIGN & PRODUCTION

PHASE 4
TECHNICAL ENGINEERING

PHASE 5
PUBLISHING/MARKETING

Food.com

Food.com needed a redesign of their site. The site was moving into a new business direction from providing online ordering of local food to becoming a destination site of food content. A phased approach towards redesign of the front end in phases was implemented. Often, due to scope, timing and budget, sites are approached in a phased manner for easier management and to a competitive analysis meet realistic expectations. Also, approaching a site in this manner allows for a faster presence on the Web, while more extensive backend and database work is being accomplished on a larger scale.

The original Food.com site was fun, funky and targeted towards online ordering only.

PHASE 1:
SITE DEFINITION

admin

concept

Client Survey	Project Team Assigned	▪ Producer/ Project Manager
Creative Brief Created	Budget/Schedule Created	▪ Art Director/ Designer
Concept Defined	**SITE GOALS DEFINED**	▪ Writer/Editor
		▪ Production Engineer
		▪ Programmer/ Backend Engineering
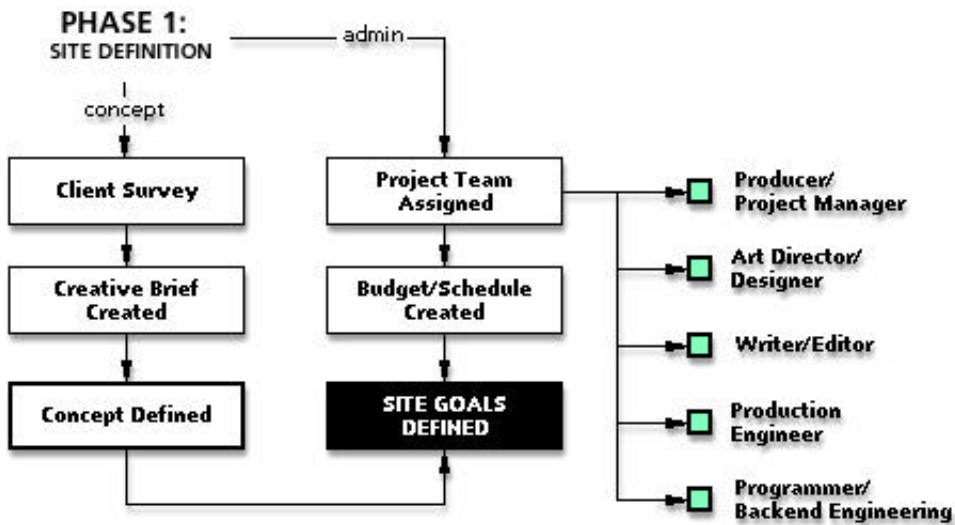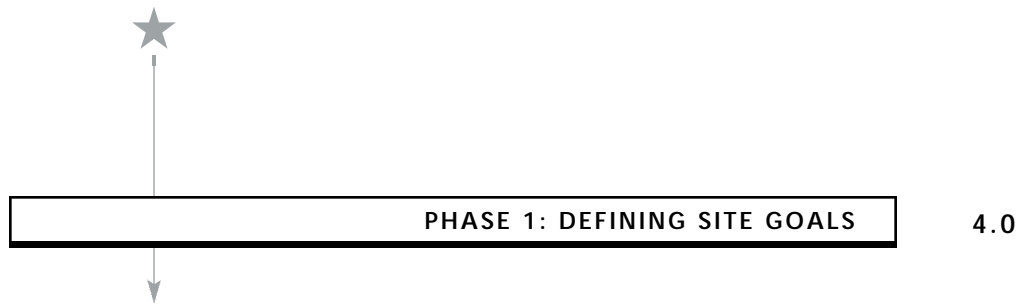
Site Definition

Once a project has been assigned, it is important to clarify and define the site
goals, set up the overall structure, organize content information and determine
roles and deliverables.

Planning & Organization

Proper planning and organization from the onset of the project is perhaps the
most important part of creating an effective site. Work with the client to
establish the budget, timeline, schedule, visual style, technical needs, content,
basic structure, target audience and the primary message to be conveyed.

CLIENT SURVEY

CLIENT SURVEY

The client survey contains detailed questions designed to help determine the client's expectations and to gain a better understanding of the overall goals and needs.

Questions are organized into categories:

MESSAGE/AUDIENCE
PERCEPTION
ACTION
TECHNOLOGY
MARKETING
ADMINISTRATIVE

Questions can be modified to match the type of project you are working on.

CLIENT FEEDBACK

The questionnaire is distrib-uted via email to all key decision makers within the company. Usually, feedback from more than one member of the client team is beneficial and gives a broader scope and feel for the project.It also encourages them to think through the project in a different way. Feedback within a short time frame is encouraged.

The following is a list of questions designed to define the overall goals of your site, including specific questions regarding content, look and feel, and function. Please answer each of the questions in a brief and clear manner. Please add any additional notes or comments at the end of this questionnaire if necessary.

MESSAGE/AUDIENCE:

1. What is the primary message you wish to convey to your audience with this site?

2. What are your secondary objectives and overall goals you hope to achieve?

3. What goals does your company intend to reach with a new Web site?

4. Who is your target audience? Is it different from your current customer profile? Describe in detail.

5. How does your company differentiate itself from competitors?

6. What are the key reasons why customers choose your company?

PERCEPTION:

1. Use three adjectives to describe how the site should be perceived by the user. (exam-ples: conservative, progressive, friendly, formal, casual, serious, experts, humorous, service-oriented, professional, etc.)

2. Is this different than current image perception?

3. What do you feel is the biggest challenge in getting your image across to customers?

4. Describe any visual elements or styles which can be utilized from existing marketing materials or collateral.

5. How is your company currently perceived? Do you wish to carry through the same kind of message through your Web site?

6. List any URLs of sites you find compelling. What do you find the most interesting about these sites?

7. List URLs of competitor sites and briefly state what you like and dislike about their overall site.

ACTION:

1. What is the primary action you wish your target user to take from the main page of your site? (examples: download,browse, move along specified path, email, order, explore, click button, call, etc.)

2. What is the primary action you wish your target user to take before leaving your site? Is it the same action? If not, describe why.

3. What elements are key items you wish to have available to the user on every page?

CONTENT:

1. Will this site use existing content? If so, what is the source and who is responsible for approval. If not, will you be creating content in-house or using an outside provider?

2. What is the basic structure of the content, and how is it organized?

3. What elements do you see as "globals" or appearing on every page within the site?

TECHNOLOGY:

1. What is your target platform and browser?

2. Are there any specific adaptive technologies you would like to utilize? If so, how will they enhance the user experience? Please describe in detail.

3. Will you have database functions? Do you already have a database in place? Please describe in detail, including specific information about programs and software.

4. Will you have a need for any secured transactions? Please describe in detail.

MARKETING/UPDATING:

1. Briefly, what are your short-term marketing goals (in the next 2 years)?

2. How will this Web site help to meet your goals?

3. Do you have an existing or planned marketing strategy in mind to promote this site? If so, please describe.

4. What do you feel is your number one business problem? (examples: change image, increase customers, promote company, etc.)

5. What methods of distributing the URL already exist within the company?

6. Do you intend on keeping the site updated? If so, how often? Who is responsible for updating and providing content?

ADMIN:

1. Who are the primary contacts from your organization and who has final approval on the project? Please list names, titles, email addresses and phone numbers if applicable.

2. What is your target launch date for this site? What are the factors surrounding this deadline?

3. Do you have a domain name in mind? Is it already registered?

4. What are your budget limitations? Can this project be broken in a phased manner to help you meet your goals?

ADDITIONAL NOTES/COMMENTS:

OTHER USES: SCREENING

Internally, this questionnaire can be used to 'interview' perspective clients. The ones who take the time to answer the questions in a thoughtful, well organized manner are likely to have put the proper thought into the creation of a site. A full proposal can be generated using this information, or used specifically for perception "look and feel" questions once the project has been awarded.

CREATIVE BRIEF

Creative Brief

The creative brief can take many forms. It can be a one page overview of the project or it can be a 20+ page report. Overall, the creative brief should determine the goals of the site, including look and feel and marketing strategy. The detail depends on the scope of the project and the expectations of the client. Refer back to this document throughout the development process.

The Producer/Project Manager: Pulling together the various components of a project and managing all aspects (including client relations) is the role of the producer, or project manager. Organizing the project from start to finish is a large task; one that requires setting up and keeping the project on task, troubleshooting, and communicating with all team members in every phase from concept through production and launch.

The Art Director/Designer: In this new medium, the 'art director' or 'visual designer' is expected to come up with stunning, effective graphics while maintaining a technical eye on download size and interface design. Working within the limitations of bandwidth and browsers is a difficult challenge, but more and more, designers are finding their 'left brain' to help merge the visual look with functionality. Understanding the fundamentals of HTML and browser-safe palettes are key to designing an effective site. Knowing relatively new programs such as Fireworks and Flash are also helpful.

Writer/Editor: Oftentimes, a client will have printed material they want to "put on the Web." Unfortunately, this format is usually not conducive to the browsing, non-scrolling desires of the user. Material will often need to be rewritten and structured for easy reading, limited scrolling, ensuring an effective message on every page. One of the most important (and often overlooked) components of effective Web development is having a writer on board (usually hired by, and working directly for, the client).

Production Lead: Managing production of the site once the design phase is completed is the role of the Production Lead. This person works with a team of HTML production staff members and communicates directly with the project manager and client. The Production Lead also facilitates production and testing of the site, keeping an eye on scope and schedule at all times.

HTML Production Engineer/Coder: Responsibilities include building the HTML pro-tosite and implementing final HTML layouts and combining design specifics and art integration into the site. The HTML Coder should be fluid in HTML and art optimization standards, including use of tables, frames, and cross-browser differentiators. The HTML Coder will be the one who is the closest to the project and should create a site that is efficient, fast-loading and matches the original vision of the site.

Programmer/Backend Engineer: Depending on the technical needs of the project, varying levels of technical expertise are necessary to make a site work. From basic JavaScript to more complex CGI and PERL, a careful analysis of the project from the onset is important in determining your back-end needs.

DEFINITION OF ROLES

Collaboration is the secret to a great Web site. Because of the changing nature of 'roles' as we know them, many individuals wear multiple hats when working on projects. Also, due to the increasing numbers of WYSIWYG editors and other HTML-easy programs, more and more roles can be overlapped.

INCLUDE THE CLIENT

Involve the client in every step of the development process. Encourage interaction with the production and engineer leads. Have the client actively participate in QA (Quality Assurance measures) and final sign off on all aspects of the site. This will ensure dedication and commitment in a team-oriented environment instead of a "us vs. them" attitude.

SCHEDULE OVERVIEW

COMMUNICATE URGENCY

A comprehensive schedule needs to communicate urgency to all parties involved. Included should be key dates for deliverables, division of process to show the various phases, and the target dates for beta,QA testing and launch.

WEEKLY BREAKDOWN

The weekly breakdown shows deliverables and methodology. It is an overview of the entire project designed to show a snapshot of the entire project on one or two pages.

CALENDAR OVERVIEW

The calendar overview shows deadlines and deliverables in a traditional calendar format.It doesn't allow for as much detailed information, but is a good format for those who use a calendar for daily scheduling.

macromedia exchange
DREAMWEAVER

Date	Details/Methodology	Admin
Week 1 Creative 3/6/00 – 3/10/00	3/6/00 Client kick-off meeting Site structure finalized, begin creative brainstorm and exploration with ad images	Content/assets due from client. Begin copywriting for features & site
	3/8/00 Concept brainstorm, finalize concept directions and begin execution of Round 1 comps	
Week 2 Creative 3/13/00 – 3/17/00	3/14/00 Present 1ˢᵗ round creative (in-person) comps. Select direction and begin full site development & product feature areas	Software due from client. Present Round 1, client sign-off and approval due Wed 3/15/00
	3/17/00 Present revisions to round 1 incorporating client comments and direction. (online for review.)	Client comments due Fri 3/17/00. Rough content outline for product features due Fri 3/17/00
Week 3 Development	Begin animation, DHTML and site production. Complete full site structure	Final copy due for product feature & site by Tues

The schedule was cre-ated and maintained in a word document and broken down into phases for design and production.

| File | Edit | View | Insert | Modify | Text | Commands | Site | Window | Help |

Untitled Document (Untitled-2*)

May 2000

Sun	Mon	Tue	Wed	Thu	Fri	
	1	2	3	4	5	6
	Creative brief Due	Weekly Status 10:00 AM	IA	IA	IA	
7	8	9	10	11	12	13
	Wireframes due	Weekly Status 10:00 AM	IA	IA	IA	
14	15	16	17	18	19	20
	Wireframe Sign-off	Weekly Status 10:00 AM	Design	Design	Design	

Example of month-view calendar created using Dreamweaver which shows all production tracks and specific due dates. The "calendar" extension can be down-loaded at www.macro-media.com/exchange.

USE DIFFERENT STYLES

Use any visual methods necessary to communicate to your audience. Shown here are two very different views of the same schedule in different phases of produc-tion. People respond to different types of stimuli. Some prefer a listing of key dates and some prefer an overview schedule showing each day in calendar style.

Content Myth & Mystery

Receiving final content from the client on schedule is perhaps the most difficult and least-predictable part of any Web project. Clients often have an unrealistic view of what they "already have ready to go" and also what items they need to create. The myth is that the content will arrive on time. The mystery is that no matter how organized both you and the client are, the content will inevitably arrive late.

Create a Content Schedule Plan

Outline content needs in as detailed a manner as possible. Begin by breaking the content into main sections, and put dates to the delivery of these sections. Begin with the areas that are most 'Web-ready' in the client's mind. Think about what content exists, what needs to be created and what needs to be edited. Assign a copywriter (or have the client hire a copywriter) and make sure the client knows that on-time delivery of content is crucial to maintaining the launch schedule. If there is a need for photography or illustration, have clear dates for deliverables and build in time for research and development.

Example of word.doc with sections including: reference, page name, HTML page name, status of copy, assigned party, rough draft due date, final copy due date, notes.

CREATE A CONTENT DELIVERY PLAN

It is important to clarify when content is due in rough and final form, and also to determine readiness. Is it a direct lift from an existing brochure? A content delivery plan out-lines each page or section in a phased delivery process, and assigns responsibility for copy, images, assets and other elements necessary.

EDUCATE THE CLIENT: WHAT IS WEB-READY?

Copy should be delivered in text format and clearly named (identify HTML page names from sitemap 5.2). Copy should be short and require as little scrolling as possible. Also, copy should have few links. Web content is usually a bit more casual and friendly than corporate brochures and ad materials.

SUGGEST A COPYWRITER

A dedicated copywriter or content manager can make or break a project deadline. Suggest a copywriter be assigned to the project, and work directly with the client.

STAGING AREA: SET UP & USAGE

STAGING SETUP

Setting up a proper staging area for your site is important to the organization and flow of your project. Although each company has its own standards for project organization and folder setup, it is important to have a few things in order.

PROJECT FOLDER

The project folder contains all administrative information, as well as the schedule and the flowchart. It also contains all raw assets and content received from the client.

PUBLISHING AREA

Within the publishing areas (where all the HTML happens) are development and staging areas set up as mirrored folder structures. During each phase of the project, complete production and testing occurs in the "dev" area before moving to the "staging" or final posting area. Both "dev" and "stage" areas should mirror each other during the project, and the work should be backed up often.
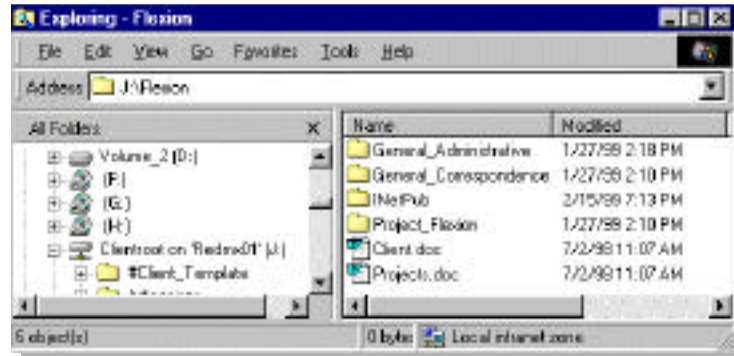
The above window shows the overall site area which is created to hold all materials, including the staging of the site in development.
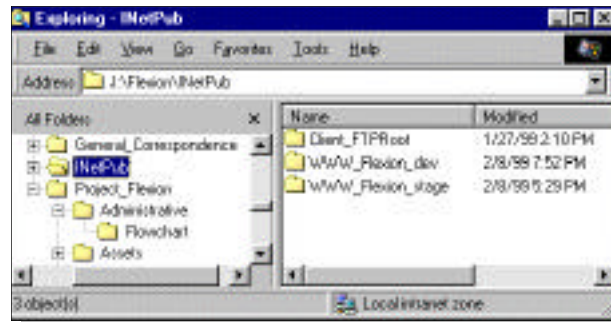
The INetPub area is the "publishing" area — containing mirrored _dev and _stage areas.
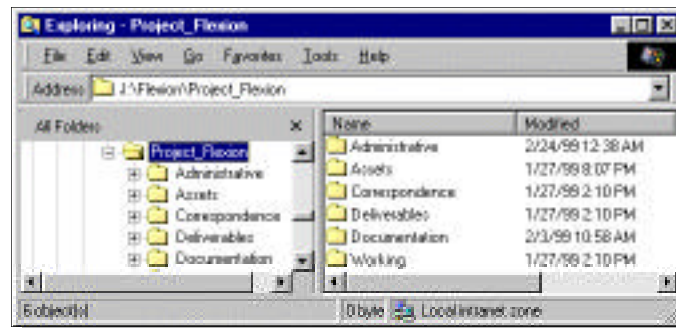
The folder "Project_Food.com" holds all materials, including graphic files and images which create the content of the site.
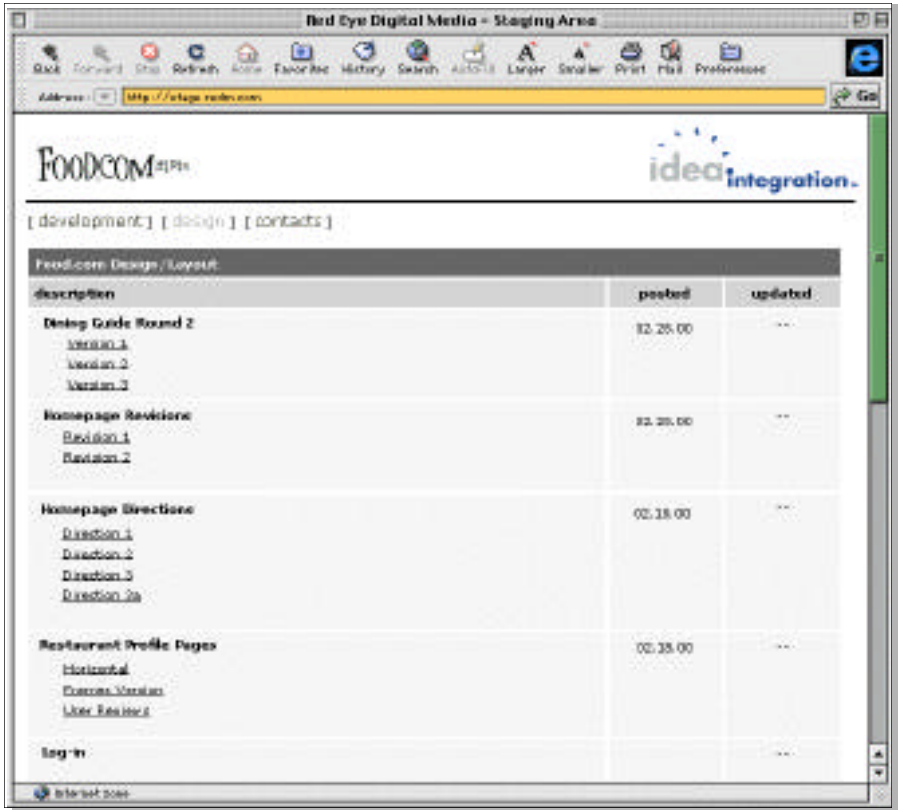
A client staging site is extremely helpful, professional and effective —
especially when dealing with an overseas client.

Using the Staging Site

Creating a staging site is an effective way to communicate the ongoing status
of the project. Idea Integration begins each project by setting up a password-
protected staging site for each client. Each client has a customized URL which
can be bookmarked for easy reference.

Ongoing Presentations and Deliverables

For this project, all presentations and ongoing site production were made using
this staging area. More complex administrative details (schedule, flowchart,
status) can also be found here at the site, but occasionally time does not allow
for complete upkeep and maintenance during the hectic delivery schedule.

4.6

PHASE 1: CHECKOFF LIST

PHASE 1 CHECKOFF LIST:

❑ Distribute/Collect Client Questionnaire

❑ Create a Schedule Overview

❑ Create a Deliverables List

❑ Write Creative Brief

❑ Create Content Delivery Plan

❑ Outline Technical Requirements

❑ Budget Hours/Tasks

❑ Define Project Team

❑ Set Up Internal Staging Area

❑ Set Up Client Staging Site

❑ Conduct Competitive Analysis (optional/informal)

❑ Client sign-off on Contract/Proposal/Budget

❑ ISP/FTP/URL Confirmed for Staging & Testing

*Remember to have the client signature on ALL important papers! Nothing makes them more accountable.

PHASE 2: DEVELOPING SITE STRUCTURE

admin

| Sitemap Created | Content Gathering/ Create a Plan | → Editing/Writing of Materials |

Wireframes Created

Technical Needs Reviewed → ▢ Database Development

Paper Prototypes Created/Tested

Naming Conventions Determined → ▢ Programming/ CGI

→ ▢ Streaming Audio/Video

Navigation & Page Flow Developed

→ ▢ E-Commerce

SITE STRUCTURE DEFINED
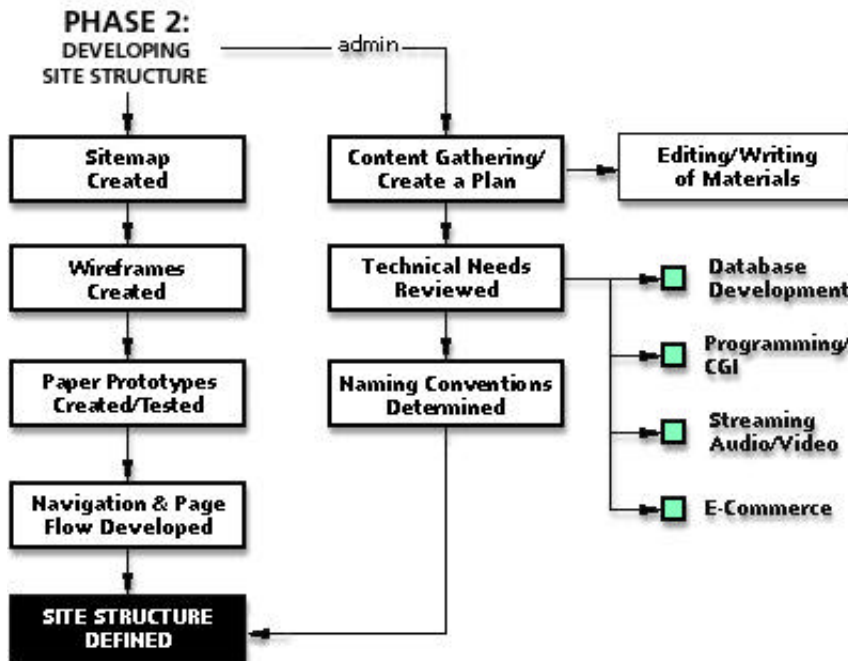
Create Structure

Developing site structure creates the backbone of the Web site, and will become the map for the project team to refer to throughout the duration of the project.

Sitemap/flowchart (Site-view)

Develop structure from a site-view perspective. Show overall organizational structure and main content areas. Keep sitemap updated throughout project.

Wireframe (page-view)

Layout content and navigation from a page-view perspective. Use a "mental model' to structure similar areas of content and navigation together.

Interaction (functional-view)

Show the relationship of one screen to the next in an interactive style. Begin to experience the flow of pages from a user-perspective. Create "paper prototypes' for informal usability testing & feedback.

Structure

▢ Flowcharting: *site-view*
▢ Wireframing: *page-view*
▢ Interaction: *functional-view*

Create a Sitemap

Sitemap creation (or flowcharting) is important to the overall understanding of site structure and content organization. It shows a high-level view of the site, should show main areas of content and HTML pages within each section. This document is a living and evolving part of the site architecture process. It is also the start of naming/labeling the sections within a site and determining global navigation.
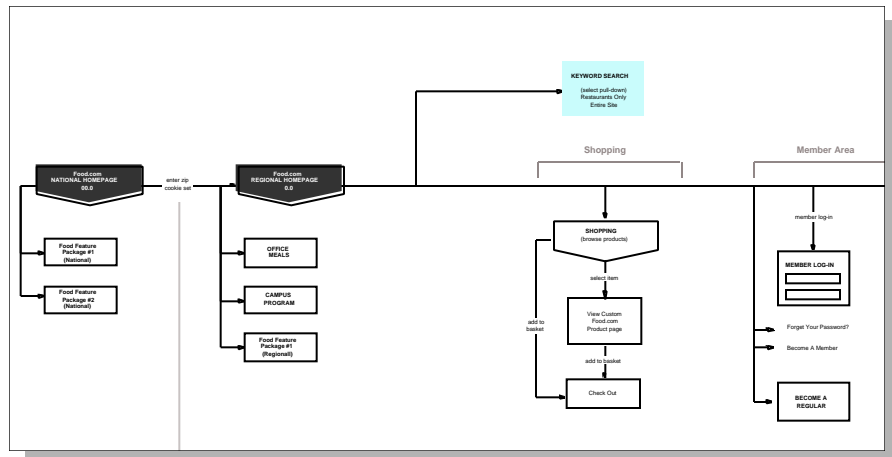
Example of final sitemap created using Visio Professional. Shown here are main categories of site and secured areas.

Keep it Updated!

It is important to keep the sitemap as updated as possible and to have the client sign off on each version created. Think of this as a blueprint for building a house. Each change in scope and structure (including deletion of pages) affects the development process, and most importantly – budget. Keeping an updated sitemap circulating will help all members of the project stay "on the same page" during all phases of the project.

ESTABLISH NAMING STANDARDS

Creating the sitemap is a good way for the producer to establish clear naming standards for all team members to follow. Usually, I create two sets of names for site sections and pages. They are HTML names and numeric names.

DESCRIPTIVE NAMING

Abbreviations or intuitive naming is based on the HTML page's content or section.

cooking.html
dining.html
editorspicks.html

NUMERIC NAMING

Having a 'code' for each section of the site helps to organize pages beneath each section.It allows you to immediately see where the content fits into the overall structure of a site.

1.0 = homepage
1.1 = secondary
page
2.0 = sectionA
2.1 = sectionA_sub

WIREFRAMING CONTENT

The creation of content layout into a non-design oriented wireframe is usually the responsibility of the project manager or producer. While designers can be solicited for input, it is important that the content for the site be identified and organized prior to the design phase.

INFORMATION ARCHITECTURE (IA)

"[information architecture is]"...creating consistent and functional systems for navigation, graphics, page layout and title languages so that the user knows where to go, what to do, and encourages them to return."
-- Web Review, Peter Monville

IA OBJECTIVES

#1 Connect User with Content

#2 Create Comfort

#3 Promote Learnability

INTERACTIVE WIREFRAMES: FUNCTIONAL-VIEW

INTERACTIVE WIREFRAMES

Paper prototypes outlining a typical user task screen by screen is a good way to establish the user-experience from beginning to end.

Both Visio (www.microsoft.com/visio) and Inspiration (www.inspiration.com) provide easy to use interfaces for sitemap development.
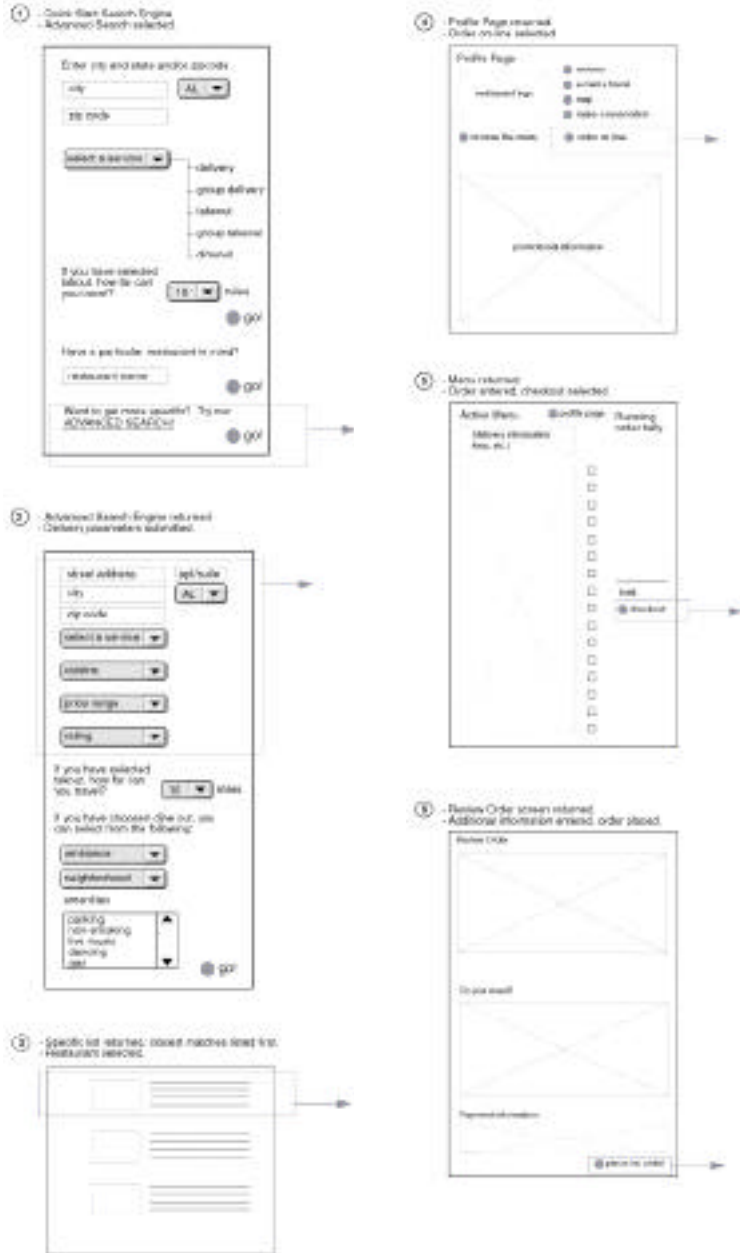
Sitemap Authoring Tools

Visio and Inspiration are simple programs, relatively inexpensive and easy to learn. Inspiration is a standalone program, with its primary and only focus on helping to create visual sitemaps. Visio has many built in tools and templates which allow a user to create very detailed maps for specific projects. Visio is only available on the PC, while Inspiration is available at a low cost for both MAC and PC users.
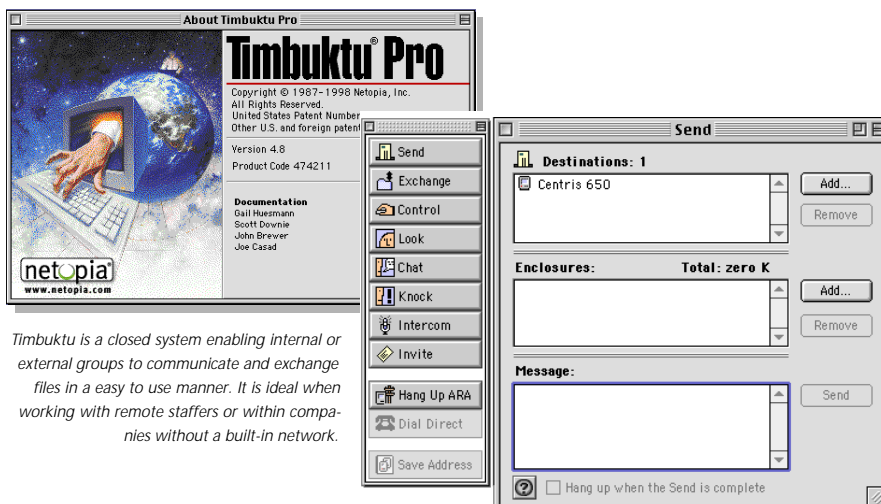
VISIO & INSPIRATION

Two programs which are easy and effective in creating comprehensive sitemaps are Inspiration and Visio. There are many features which help in creating the sitemap, however it takes some learning to understand how to communicate using the various diagrams and boxes.

There are many other programs available which have sitemap authoring tools including "Go-Live Cyberstudio." Use whichever tools you feel most comfortable with and which will integrate into your current workflow.

Timbuktu is a closed system enabling internal or external groups to communicate and exchange files in a easy to use manner. It is ideal when working with remote staffers or within companies without a built-in network.

TIMBUKTU PRO

Within companies and outside companies, Timbuktu is an easy way to exchange files and control other computers from remote locations over ethernet or TCP networks. You also have the ability to communicate via voicelink using an intercom feature. It is a closed network in an open system, used for internal systems or remote staff. See www.farallon.com for more information.

18

PHASE 2: CHECKOFF LIST

Site architecture is created. Navigation and technology are addressed and clarified. Naming conventions are defined.Wireframes are created for high-level pages. User tasks are defined and 'interactive' paper-prototypes developed and tested.

A backbone is created for the rest of the project to build on. Move to Phase 3.

PHASE 2 CHECKOFF LIST:

❑   Content Outline Completed

❑   Sitemap Created

❑   Naming Conventions Set

❑   Wireframes Completed for 1st and 2nd level pages

❑   User Tasks Defined

❑   Interactive Wireframes (Paper Prototypes) Created

❑   Usability Testing on Prototypes (optional)

*Keep sitemap updated!

PHASE 3: INTERFACE DESIGN/ PRODUCTION

design —   — protosite —

Visual Design Development

Click-through Protosite Created

Client Approval

Art Production/ Cutting/Slicing

Frames/Tables Configured

Art Submitted for HTML

Forms/Databases Designed

PROGRAMMING/HTML PRODUCTION BEGINS
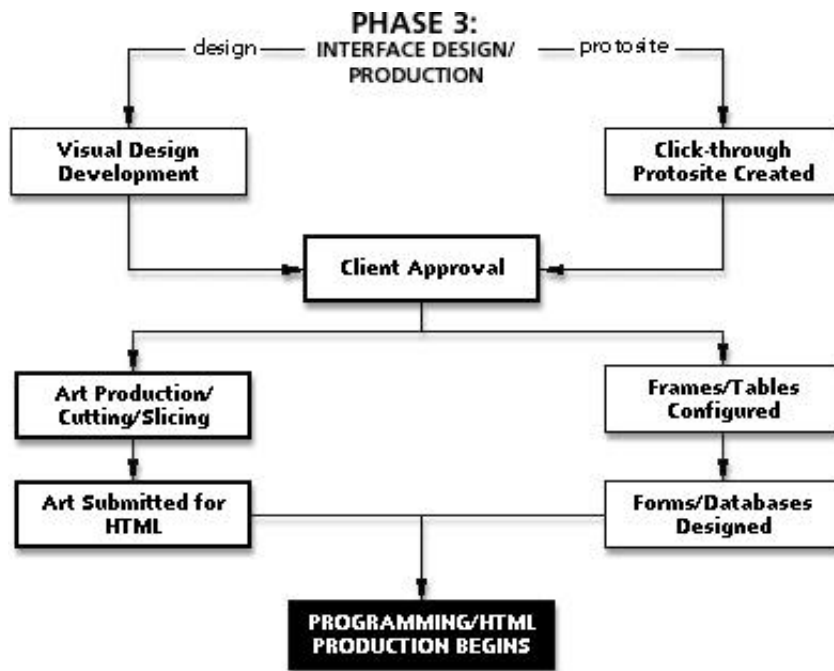
Interface Design

With the sitemap and navigation overview complete, the next phase of the project can begin: Interface Design. It is important that the digital artist/art director work closely with the producer and programmer to ensure that all design elements are standardized.

Design & Production

Once the visual direction is approved by client, the graphic "look and feel" of the site begins. Navigation, interface design and functionality are combined with the visual direction. Compression, transparency, efficient use of color and design combine to create effective Web graphics.

User Testing

During various phases in the development process, usability testing is a valuable way to make sure the navigation and functionality is intuitive. Troubleshooting early in the process saves valuable time and budget in the end. User testing can be in the form of focus groups, surveys and one-on-one usability testing.

INITIAL DESIGNS

Various design directions were created and posted to the Food.com staging server for client review. These designs were presented for overall look and feed,to determine the overall perception and tone of the site.

When designing initial screens, it is important to keep optimization and HTML standards in mind, such as background images, frames and tables.

These are the initial design directions presented to Food.com. Shown here are pages for look and feel, created while information design was still taking place.

The final approved designs are shown above.

FINAL DESIGNS

The final design of the site should address your audience and overall site goals. Varying modem speeds should be taken into consideration, along with target browser and platform limitations.

In this case, the final designs were selected after several rounds of design. The final look and feel directions shown here were part of a phased implementation project.

PROTOSITE DEVELOPMENT

**CREATE AN IMAGE
MAP CLICK-THROUGH**

For usability testing, an image map click-through of the site using approved designed pages was created. Testing is important at this stage of development to test the actual user against assumptions.

**NON-DESIGN
ORIENTED PROTOSITE**

Protosite development can also be putting together a non-design oriented HTML click-through of the site. Testing functionality is important at this stage to have a working model of how the site will operate, to help get a sense of what the user will experience and if the site makes sense.

These pages are turned into quick and easy click-throughs by using image mapping in Dreamweaver or another WYSIWYG program.

A page created in Photoshop is imported into Fireworks for cutting-up and optimization.

Optimize!

Optimization of graphics is crucial to creating a site that downloads smoothly and quickly. After the design is approved, files are imported into fireworks and decisions on how to cut-up and optimize each element occurs. At times, with image-heavy graphics, it is more effective to use JPEG images. For the most complete optimization, GIF images are used.

Fireworks 3.0 is the latest release from Macromedia, and the slice feature allows you to cut up multiple graphics from various files as well as a new find and replace feature for easy updating. Improvements in JPEG previewing and image optimization make this program extremely useful.

CUTTING UP GRAPHICS

Formulating a strategy to build the approved screen design into HTML standards and incorporate functionality is a great challenge for the HTML Production Engineer. Knowing how to best "slice" the graphics and optimize for the lowest amount of colors is an important part of this stage.

KEEP DOWNLOADS SHORT

Each page should be as small in total k-size as possible. A good rule of thumb is to assume the user is on a 28.8 modem. Each 'k' (1,000) bytes takes about .5 seconds to download. Therefore, a 30k image on a 28.8 modem will take approximately 15-20 seconds to draw on the screen. It is good to set strict goals for page size, usually around 30k.

USE WEB-SAFE PALETTES

For optimum cross-platform performance, use a Web-safe palette to maintain a consistent look and feel throughout your site. It will also enable match graphics to seamlessly merge with same-color tables or backgrounds.

PHASE 3: CHECKOFF LIST

PHASE 3 SUMMARY

Design process begins. Interface designs are presented and approved. HTML or image map protosite developed from approved wireframes. Art production & optimization begins. Visual design defined,move to Phase 4.

PHASE 3 CHECKOFF LIST:

❑ 2-3 Rounds of Designs Submitted for Review

❑ HTML/Imagemap Click-through Created from Wireframes

❑ Global Elements Created & Approved

❑ Art Optimization/Slicing Begins

❑ Animation or Rollover States Created

❑ Templates or Pages Outlined & Created as PSD Files

❑ Focus Groups or Usability Testing for Feedback

❑ Images/Stock Photos tracked for usage licensing

*Remember to refer back to the creative brief during this process.
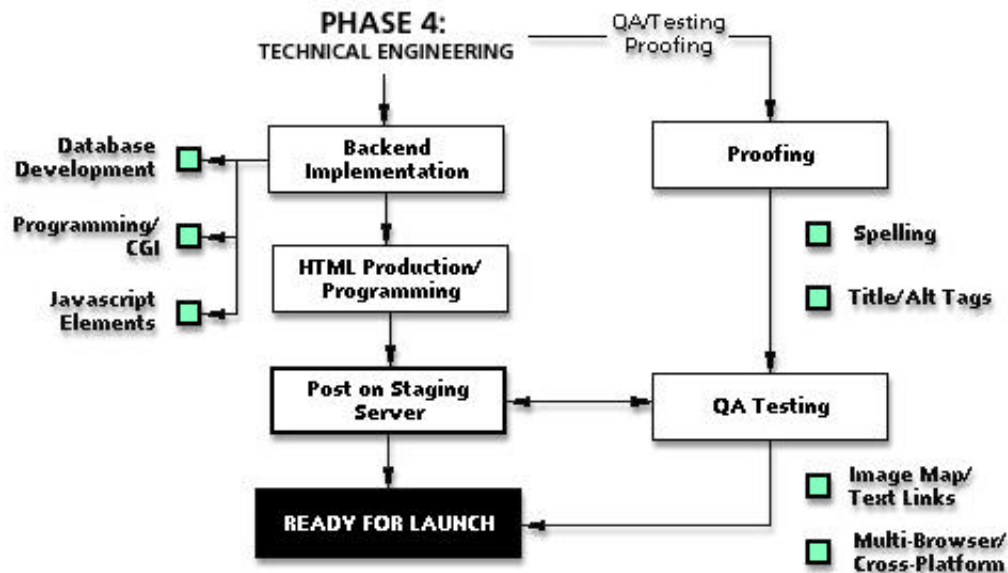
Technical Engineering

Once the design and layout are complete, the site engineering can begin, usually at the same time the art is being cut-up and optimized.

At this time, all technical aspects of the site, including forms, databases, frames and other needs, are addressed.

Know Your Audience

Think about your target user. Instead of trying to create the perfect site for a particular browser and platform, think about your audience instead. Remember most visitors to the site will not have large screens and fast modem connections.

NO FRAMES POLICY

Any site which can be created and navigated without the use of frames, will be easier to produce, proof and update. The functionality of frames and advancements of today's browsers makes a frames environment more inviting; however, think first if similar accomplishments can be made using tables.

USE "ALT" TAGS

Naming conventions for page, titles and <ALT> tags should be thought through and estab-lished in advance. Seldom does the client think about the TITLE (the page name as it appears in the browser) or set up ALT tags for a graphic (the name of the graphic that appears while the image is loading.) Often the HTML coder is left to insert <ALT> and <TITLE> tags with-out direction,which may not keep with the overall look and feel of the site.
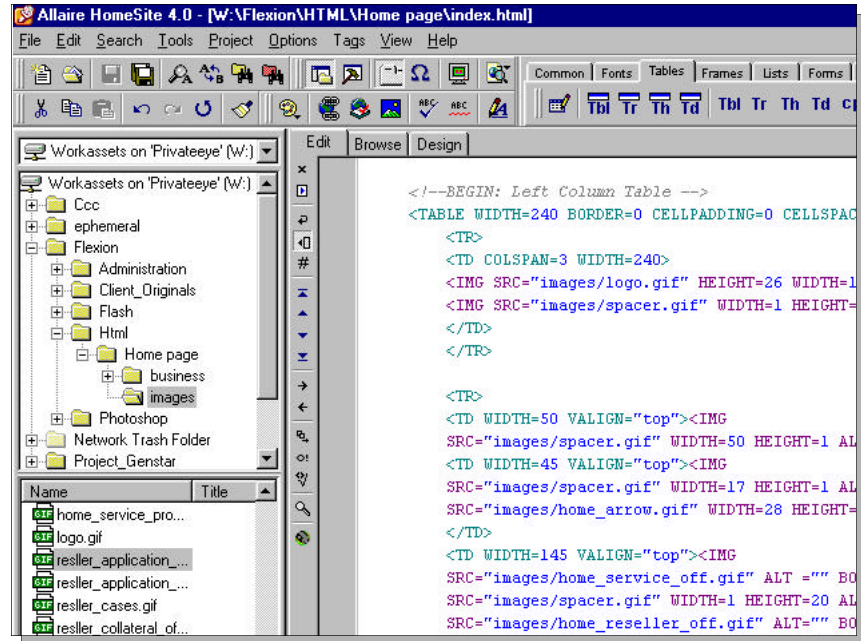
Allaire HomeSite is an excellent HTML Text Editor, with a variety of build in font and tag features.

Layout and Production

The job of a good production engineer is to incorporate their knowledge of both HTML standards and compression techniques to create an end result that is as close to the original vision of the site as possible. Creative use of tables can save download time and increase functionality. As a producer, be clear with functionality and overall goals for each page, and let the HTML production engineer make decisions as to the best way to accomplish the task.

HTML Text Editors

Text editors are used by HTML 'purists' who are fluent in HTML and are able to create pages from scratch. There are many solutions for HTML text editors such as BBEdit and HomeSite. For the Food.com site, Allaire HomeSite was used to create the HTML pages. HomeSite allows the coder to customize their HTML, including setting up color preferences and shortcuts. The interface is icon based and very user friendly.

BACKEND ENGINEERING/PROGRAMMING 7.2

Client-side Scripting

JavaScript is used for simple effects such as roll-overs to more complex usage, such as calculators. The JavaScript is written as part of the HTML within the body of the code. JavaScript was developed to allow programmers to have more control over site functionality without depending on the server. Not all browser types support JavaScript, however, and measures need to be taken in case a particular viewer is on an older browser (Netscape 2.0 and Internet Explorer 3.0 and below.)

Custom Programming

For more specific functionality, it is sometimes necessary to use server-side programming, called CGI (Common Gateway Interface.) The difference here is that the coding/scripting is not part of the HTML, but stored on the server itself. Various programming languages are used, but the most common is PERL (Practical Extraction and Report Language) and Visual Basic. Other programming languages commonly used are C and Java.

ESTABLISH BACKEND NEEDS EARLY ON

Backend programming, especially anything requiring CGI,can be very expensive and can quickly lead to budget concerns if not estimated properly. At the onset of the project,steps should be taken to determine exactly what the required task is;from there the Technical Engineers can determine the best way to produce the desired outcome.

BETA LAUNCH/QA TESTING 7.3

QA Testing/Proofing

It is critical for all individuals participating in the creation of the site (including the client!) to be involved with testing and proofing. Because of the complexity of the site, various methods can be used to ensure all aspects are tested. This includes multiple browsers, platforms, screen size and modems. For thorough testing, all target browsers on both MAC and PC should be tested. Assign various members of the team different sections of the site.

Beta Launch

This version of the site contains all content, programming and functionality. Setting up proper time for Beta Testing and feedback will ensure time for corrections and preparation for launch.

ORGANIZE QA TESTING

QA (Quality Assurance) testing needs direction and organization. Usually, the more people involved,the better. Assign individuals a portion of the site, and have them check on one or more browsers on both MAC and PC platforms. Testing a lower modem speed computer with a small screen is also recommended.

PHASE 4: CHECKOFF LIST

PHASE 4 SUMMARY

HTML production begins on full site or template pages (for dynamic sites.).Light scripting takes place (javascript, basic CGI, DHTML.) Completed site is posted to staging server for QA testing and proofing. Technical engineering is complete, ready to move to phase 5 -- Launch!

PHASE 4 CHECKOFF LIST:

❏   Graphics Optimized/spliced, global elements created

❏   Template Production Begins

❏   Final Content Added to Template or Full Site Pages

❏   ALT tags, META tags and <title> Tags Implemented

❏   Light Scripting (DHTML, Javascript) Implemented/Tested

❏   Development on Staging Server

❏   Internal QA on Staging Server

❏   Beta site launched, external QA begins (test plan in place)

❏   Special Technologies Implemented (Back-end Development)

❏   Verification Usability Testing

*QA throughout the design & development process both informally and formally

Publishing Your Site

Files are transferred to the server via FTP (File Transfer Protocol) and are then available online. Marketing and promotion begins via online links, search engines and/or print material.

Maintenance Schedule

Now that the site is launched, it is important
to have a maintenance schedule in place for updates and reviews during the next 6 months to a year.

Follow Up & Archive

Make sure to have a wrap up meeting to discuss any issues which may be avoided the next time, and obtain feedback from the client about the process and the finished product. Archive all materials and assets, including all assets and the final code for the site.

MAINTENANCE SCHEDULE/UPDATING

Updating and Maintenance

One of the most common occurrences is to have a site launch with no plan for maintenance or updating. Keeping your site fresh is important for your audience. Prior to the live date, make sure the client has a designated contact for maintenance, and a schedule built in for how often and which areas will be maintained. Nothing is more common than having a "What's New" area which isn't updated for several months after the site is live.

There are several options for how to keep your site fresh — including the creation of a 'database' of content (such as an image, banner or quote of the day) which can be programmed to update randomly each time the page is refreshed. Other options include the use of a customized 'posting' tool which allows the user to add content and images without the use of HTML.

CREATE A PLAN

From the start of the project, have a clear maintenance plan in place for the upkeep and updating of the site. Ask questions up front "Who is responsible for maintaining the site," and "Who is responsible for supplying content?" and build in the expectation for additional budget and resources to help fill the need.

MARKETING/PROMOTION

Promotional/Publicity Companies

Along with standard marketing efforts, it is wise to consult some outside specialists. There are several fee-base services that specialize in Web site promotions. Here are a few:

AAA Internet Promotion: http://www.websitepromote.com
WebPromote: http://www.websitepromote.com
Worldata Services: http://www.worldata.com

How to Announce Your New Web site: http://www.ep.com/faq/webannounce.html

How To Publicize Your Web Site Over the Internet:
http://samizdat.com/public.html

MARKET YOUR SITE

Part of the pre-planning process of creating a Web presence is to have a plan for marketing and promoting your site. Think in advance about company-wide marketing and promotions already in circulation, and how the URL of your site can be distributed to your current customer base. Know your audience base and how they can best be reached.

Listing Your Site with Search Engines

Creating a Web site is one thing, building online traffic is another. Knowing from the beginning how your site is going to be promoted and marketed is part of the overall site plan. Usually this includes getting your Web site listed with a search engine.

Keep Your Site Frameless

For better listing results, keep your site free of frames – at least on the home page. Most search engines won't 'crawl' through framed sites. META tags are also important. They are the keywords or descriptions embedded within the HTML of a page which helps classify or describe the site – search engines such as Infoseek and AltaVista look for a META tag.

Factors Which Help Rating

All search engines use different methods of ranking and rating sites. There are some basic factors which can help with the results. These include using key-words in the URL itself, along with keywords in the title. For complete infor-mation and an overview, check out **www.searchenginewatch.com**.

Submitit.com is a good example of both a free and paid online submission site.

Automated Entry Sites

www.submitit.com
www.exploit.com
www.search.com

Top Search Engines

www.altavista.com
www.excite.com
www.goto.com
www.hotbot.com
www.infoseek.com
www.looksmart.com
www.lycos.com
www.snap.com
www.webcrawler.com
www.yahoo.com

Paid Services

www.NetPost.com

www.websitepro-
mote.com

webpromote.com

www.worlddata.com

Review Sites

www.coolsites.com
www.cooltool.com
www.100hot.com

STYLE-GUIDE

A style guide is a good way to provide information for ongoing maintenance, design and production.Creation of a simple GIF page with call outs, or a more in-depth HTML style guide is up to time and budget.A style guide should contain the following:

Fonts & Sizes

PSD information
(for drop shadows or effects)

Page & Graphic Dimensions

Color Usage

Graphic Usage/Photo Treatments

Global Elements

PHASE 5 CHECKOFF LIST:

❑   Publish Site via FTP

❑   Confirm Marketing/Promotion Plan

❑   Register with Search Engines (if budgeted)

❑   Make sure Meta tags are in place for searching

❑   Have a Maintenance/Update Schedule in Place

❑   Schedule a Follow-up Meeting with Client & Team Post Launch

❑   Style Guide Creation

❑   Back-up Files/Create Asset & Final HTML CDs

*Make sure a clear maintenance plan or Phase 2 work order is in place.

PHASE 5 SUMMARY

Publish your site via FTP. Make sure a marketing/ promotion plan in place prior to launch.Register with search engines. Have a maintenance schedule in place and plan for a follow-up meeting with the client and the team after the launch.

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