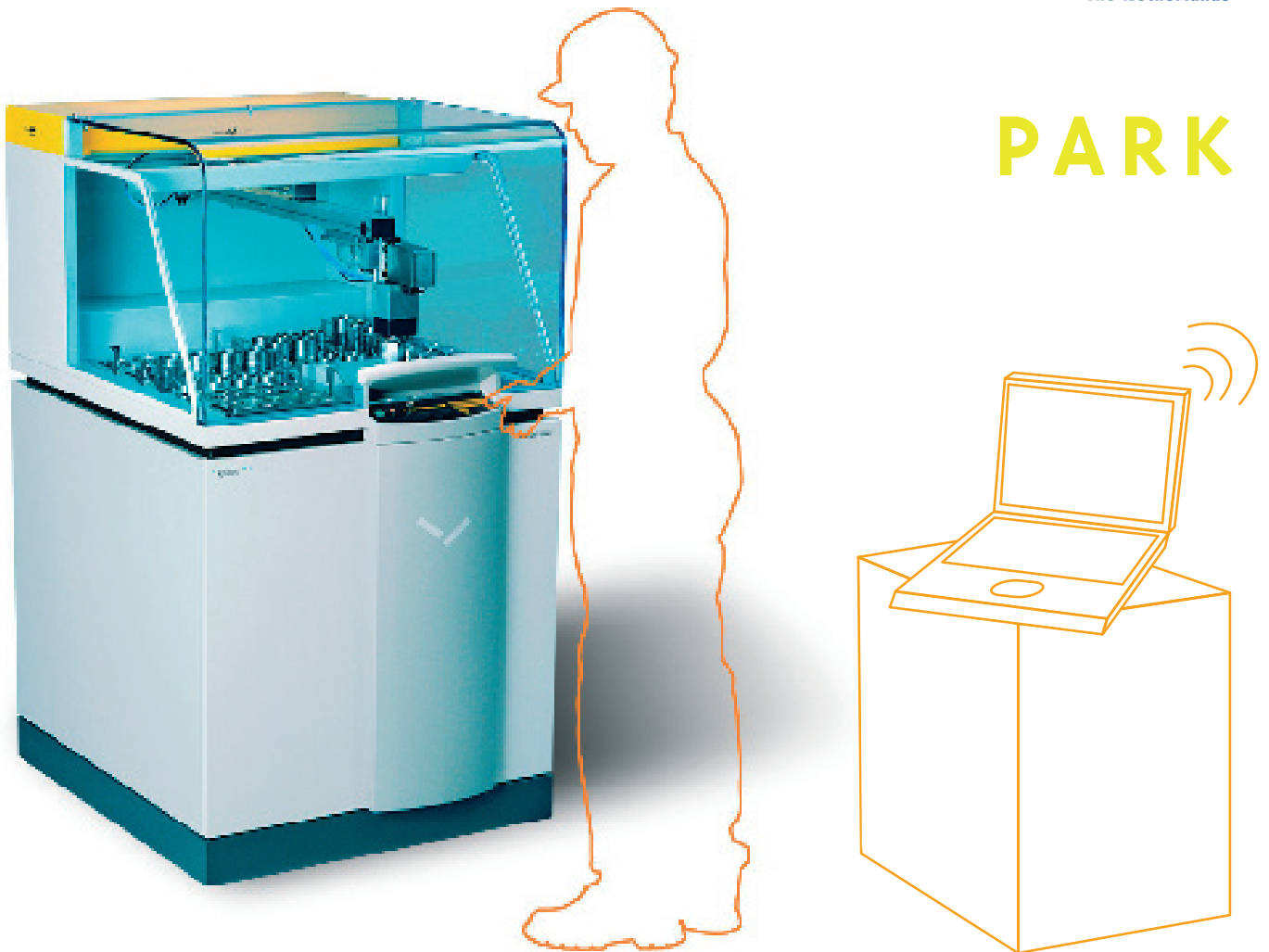


Bachelorstudy Industrial Design
Final report - version 1.6
Author: Jan Tijssen
Date: February 25th 2005



PARK



**Online
Manual
Application**

Title page

Bachelor study final report

Title: Online manual application
Subtitle: It's difficult to keep it simple.
Author: Jan Tijssen
Version: 1.6
Date: February 25th, 2005

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Preface

"It is difficult to keep it simple."

A phrase that did pop up in a phone conversation in the middle of this project. Personally, I think that this phrase sums up the core of this bachelorstudy. My goal in the whole project was to keep my product, an online manual application, as simple as possible at all times. But an online application did turn out to be a difficult 'product' by all means. It was a constant challenge to change complex structures in concrete solutions. I hope I have succeeded in this challenge.

I want to thank Folke Meijer, my supervisor at PANalytical. I also want to thank Frans Joziase and Arnold van Bezooyen from PARK advanced design management. Finally I want to thank prof.dr.ir. Arthur Eger from the University of Twente for his support during this bachelor study. The help and inspiration of all these people was more than useful in the progress of the whole project.

A handwritten signature in black ink, appearing to read 'Tijssen', with a large, stylized initial 'T' that loops around the first part of the name.

Jan Tijssen
February 25th 2005

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Introduction

1

1 Introduction

PANalytical is the world's leading supplier of analytical instrumentation and software for X-ray diffraction (XRD) and X-ray fluorescence spectrometry (XRF). The materials characterization equipment is used for scientific research and development, for industrial process control applications and for semiconductor metrology. The company's headquarters are in Almelo, the Netherlands. PANalytical was founded in 1948, as a department of the worldwide electronics concern Philips. Formerly, the name of the company was Philips Analytical.

In 2002 Philips sold Philips Analytical to the Spectris group. The Spectris group is listed on the London Stock Exchange and has 15 other business units besides PANalytical. Philips Analytical was sold because Philips wanted to focus on their main markets, like consumer electronics and semiconductors.

From that day, Philips Analytical changed into PANalytical. PANalytical did become an independent brand, which was not the case when it was a division of Philips. The safe and sound position behind the superbrand Philips was suddenly no longer there. PANalytical can operate semi-autonomous within the Spectris group. PANalytical is now fully responsible for the marketing and promotion of their brand new brand.

When Philips Analytical changed into PANalytical there was of course no instant new brand identity. Everything and everyone was still simply thinking 'Philips'. The first PANalytical slogan was simply: "Same people, same products, same support."

The top management decided to start a large project to create an own new independent brand identity. The project is called the EBL project. EBL stands for Experience Brand Language. Marketing Services Manager Folke Meijer leads this enormous operation. Within the EBL project falls everything related to creation of the new brand identity of PANalytical. This involves a new corporate strategy, brand personality but also a new graphical housestyle. PARK advanced design management, a company specialised in branding processes, assists PANalytical with the entire EBL project.

An important part of the EBL project is the creation of nine design manuals, each for a different design discipline within PANalytical. These nine disciplines are: graphic, imagery, copy, product, user-interface, web, booth, facility/3d and behavior. In these nine manuals all the guidelines for these new brand identity elements are formulated. These manuals are an important tool for implementing PANalytical new brand identity in the own organisation, but also for communicating the PANalytical brand identity to the external market.

The current nine manuals are made by various external design bureaus. There is missing consistency between the manuals. PANalytical is searching for a new unambiguous navigation and 'look and feel' for all EBL manuals. In this new navigational form, the needs of the everyday users of the manuals must be taken into account very seriously.

A new unambiguous navigation and look and feel for all the nine design manuals with a strong emphasis on usability. That is the core of this bachelor study.



Task Description

2

2 Task description

In the beginning of this project a so called project plan was made. This project plan was formulated based on the first inputs from PANalytical. The whole original plan is attached to this report. This original plan also contains the original project planning. (attachment A1) The main objective and main research questions from the project plan are summarised in this section.

2.1.1 Main objective

The main objective of this research is the design of a unambiguous navigation and a 'look and feel' for all design manuals within the EBL project. The base for this design is an analysis of the needs of the future internal and external users.

2.1.2 Research questions

Five main research question have been formulated in the original project plan:

- 1) What is the function of the nine manuals?
- 2) What are the differences and similarities between the current manuals?
- 3) What are the needs of the future internal/external users of the different manuals?
- 4) Which navigation and design is applicable on the manuals, so that the needs of the users are satisfied?
- 5) Is the new design for all manuals, applied to the product manual, satisfying the needs of the intern users within the Asterix¹ project.

This answers of these five main research question together will together fulfil the main objective. These five questions will also form the thread throughout this report.

2.1.3 Deliverables

Four so called 'deliverables' have been agreed at the start of this research project.

- A navigational design that is applicable on every manual
- This navigational design worked out for the product manual
- An user map for the product manual
- A written report that describes the whole research trajectory.

PANalytical made the choice for working out the product manual in the new navigational design. This is the case because the product manual is the most close to the study Industrial Design.

¹ AsteriX is the codename for the next generation XRD product family, developed in accordance with the guidelines from the EBL product manual.



EBL project

3

3 The EBL Project

The EBL project was started because PANalytical wanted to have an clear own brand identity. The safe position behind the superbrand Philips is no longer there. PANalytical is now semi-autonomous within the Spectris group. The project was started mid 2003 from the marketing services department. The objectives were a new brand identity and new design standards/principles.

The foundation of the brand PANalytical is born in the EBL project. EBL stands for **Experience Brand Language**. This is a 'system' in which a brand and a corporate identity are being created in steps. The system is created by PARK advanced design management. The first part of the EBL project is the so called EBL corporate design:

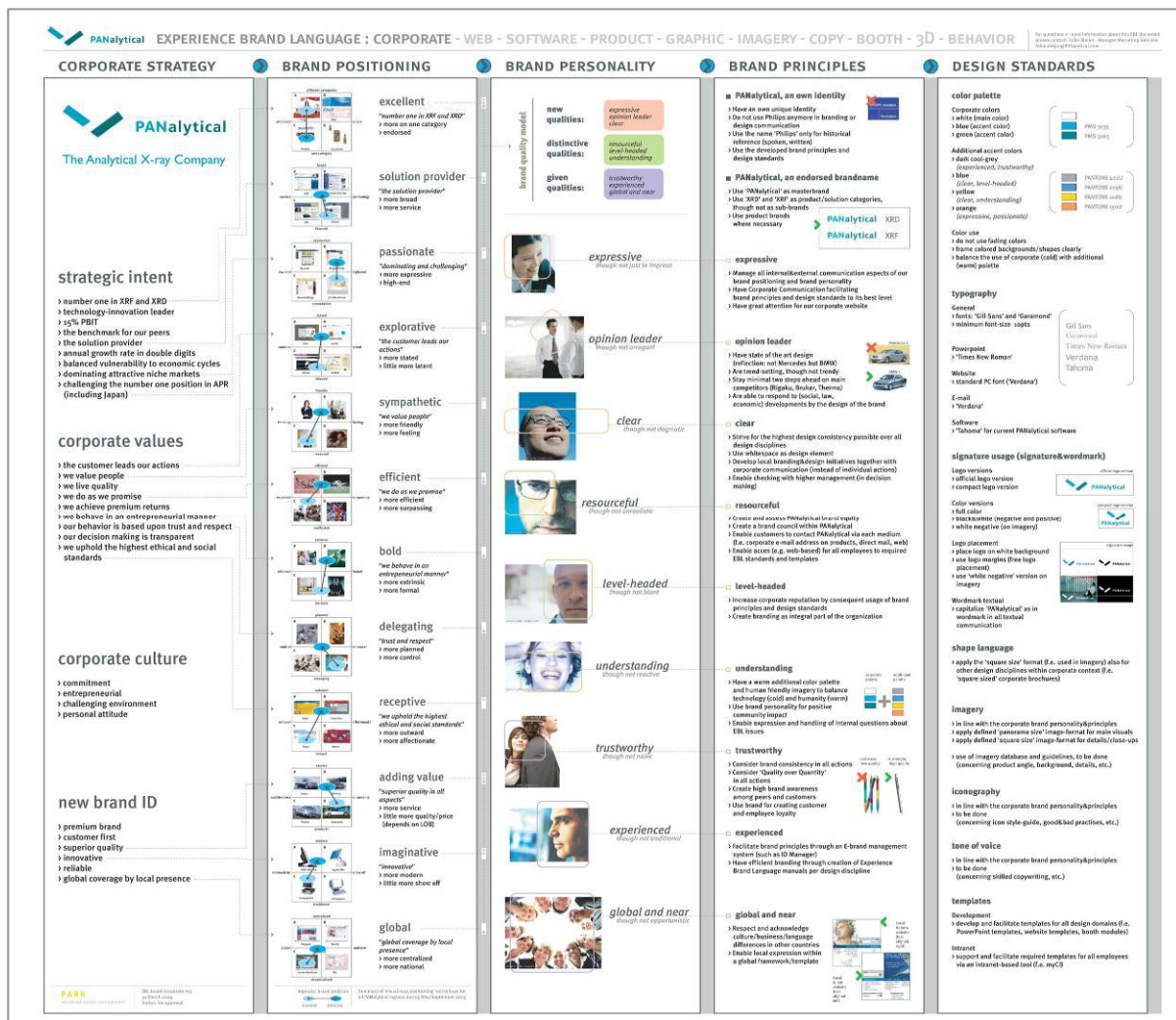


Figure 3.1 EBL Corporate design

The corporate design is the most important and is the starting point for all nine design manuals. The corporate design exists of five steps. First a corporate strategy is formulated. This is done top down from the BU management². The corporate strategy is split in strategic intent, corporate values, corporate culture and the wished new brand identity. The whole strategy is summed up in one sentence: 'Enhancing customer productivity by turning (X-ray) technology into high added value analytical solutions'

² Business Unit Management. The top management team of PANalytical.

The second part is 'Visual Position Mapping' This is the bottom-up part of the EBL project. In so called workshops 120 employees of PANalytical did cooperate in this part. In schematic drawings the brand is positioned in the market. On the drawing there is the current position and the desired position of the brand. These desired positions will produce descriptions that describe the new Brand identity of PANalytical.

These descriptions are converted in the third step to the nine core qualities of PANalytical. These nine qualities are the heart of the EBL project. The nine qualities are:

Expressive – Opinion Leader – Clear –
Resourceful – Level Headed – Understanding –
Trustworthy – Experienced – Global and near

The qualities can be divided in three categories: New qualities, distinctive qualities and given qualities. The new qualities are the ones that have to be achieved in the EBL project.

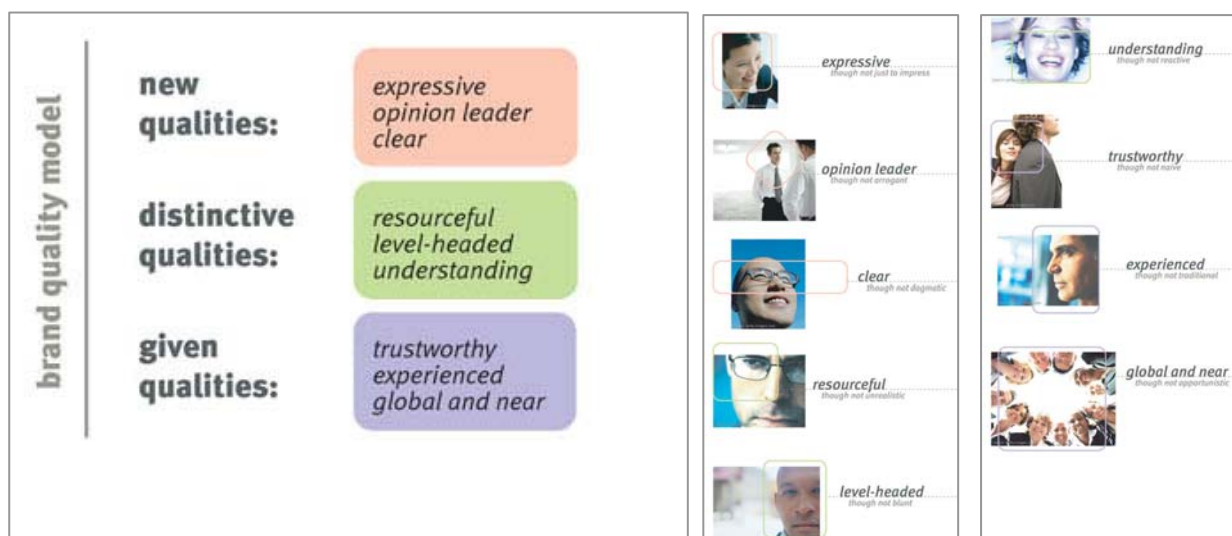


Figure 3.3 Nine EBL qualities

In the fourth step of the EBL corporate design there is an investigation of what's needed to change in the company to achieve all the nine qualities. This is done for each quality separately.

In the fifth and final step the corporate identity is transformed to general design standards for the brand PANalytical. These are the colour palette, typography and the PANalytical logo³.

After the corporate design is completed for the whole company, manuals have to be created for different design disciplines in the company. These manuals have to make sure that the new corporate brand identity is being expressed in all these different design disciplines within PANalytical.

³ Comment: The design standards in the EBL corporate design have been altered in the new Graphic Manual by Eden.



Manuals

4

4 Manuals

4.1 Introduction

The brand identity of PANalytical is created within the EBL project. The foundation of this project is the EBL corporate design with the nine core qualities. The brand of PANalytical has to be expressed in various design principles inside the company. For all these design disciplines within PANalytical there are manuals designed by various design bureaus. There is a total of nine design disciplines:

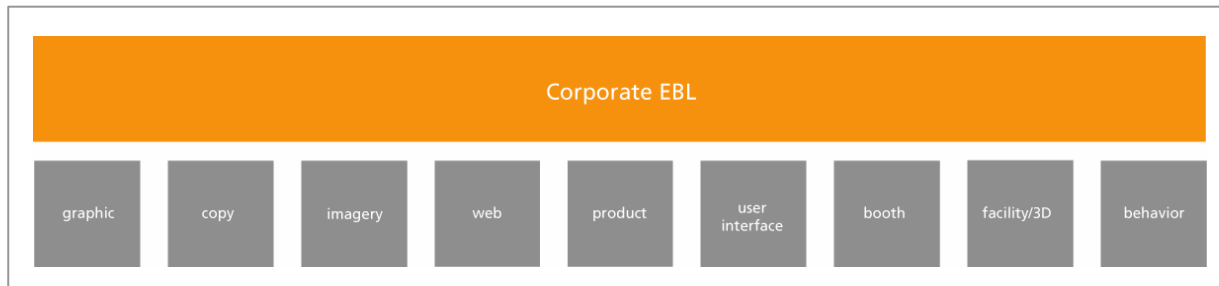


Figure 4.1.1 The nine manuals

There is an order in importance in the nine manuals (left to right). This order has been made by Marketing Services Manager F. Meijer and PARK advanced design management adviser F. Joziase. The function of these separate manuals is that the nine core qualities of the EBL corporate design are reflected in these nine aspects. The principles and brand standards for the future design are being laid out in all of these manuals for the specific design principle. The manuals contain guidelines, examples, templates for each aspect. The manuals will be used by both internal and external users.

The manuals are made by various design bureaus. An overview of all design bureaus and their produced manuals:

EDEN Design & Communication Amsterdam -> Graphic, Imagery

Van Berlo Studio's Brand and Identity design Eindhoven -> Product, User-Interface

Kapler Communications London -> Copy

Wit Design Zoetermeer -> Booth

<theFactor.e> Groningen -> Web

The manuals have been designed by these bureaus with keeping in mind that other designers will have to work with the manuals.

The manuals 'Imagery' and 'Booth' were not completely finished during this bachelor study, but temporary manuals were available. The manuals 'User-Interface', 'Facility/3D' and 'Behavior' were still in a very premature stadium and temporary versions were not available. They have been excluded in most analyses in this report.

4 Manuals

4.2 Overview

In this paragraph an overview is given of all manuals that are completed within the EBL project. With each manual there is extra attention for the design and structure of it. How has the design bureau designed the manual?

4.2.1 Graphic

Designed by: Eden Design & Communication Amsterdam

Medium: Paper

Format: Landscape A4 format & Landscape A3 format

Language: Dutch

Date of review: Nov 5th 2004

The graphic manual contains guidelines for the use of color, typography and formats in all expressions of PANalytical. The graphical house style is being defined in this manual. The graphic manual consists of two parts. In the first part of the manual the basic elements of the graphical house style are described. The basic elements are colors⁴, grids, images, silhouettes and typography. In this part there is also some textual explanation in the form of guidelines. After the description of the basic elements in the first part, there is a second part with a lot of inspiration examples. There are inspiration examples for different formats of paper and a different use of columns. Specific templates such as stationary, visiting-cards are not available in the manual. The manual is an inspiration for designers intern or extern. There are no strict dimensions, it's a toolbox of building blocks with inspiration examples to show what's possible.

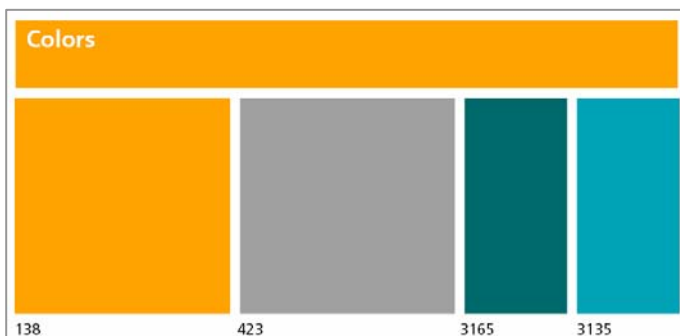


Figure 4.2.1.1 EBL graphic colors



Figure 4.2.1.2 EBL graphic typography

Present:

Building blocks

Inspiration examples

Not Present:

Fixed lay-outs for stationary, forms, visiting cards, powerpoint slides.

Best/Worst Practises

⁴ EDEN has made adjustments in the colorpalette from the Corporate EBL in this graphic manual. The original colors in the EBL corporate design have changed. The colors blue (PMS279) and yellow (PMS108) are totally gone from the color palette, and the other colors (grey and orange) are different.

4.2.2 Copy

Designed by: Kapler Communications
Medium: Powerpoint presentation
Language: English
Date of review: Oct 28th 2004

The copy manual contains guidelines for all the copy material within PANalytical. This material can be a presentation, an advert, an article for a magazines, content for the website, etc. Everything that contains writing.

The copy manual is designed as a non-linear document, in the form of a Powerpoint presentation. It has an user-centered taskbased design. This means that the user can access information in the manual by clicking through a system of hyperlinks. It is designed as a user-centered design because of the future application of the manual. The usability has been taken into account very seriously.

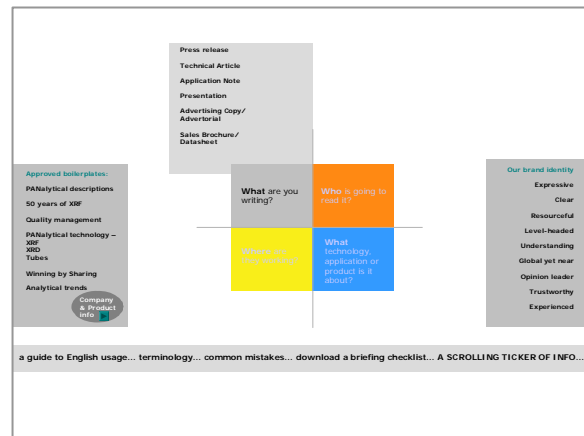


Figure 4.2.2.1 Powerpoint format copy manual

The manual asks the user different questions to come to the right information. The four main questions in the copy manual are:

- What are your writing?
- Who is going to read it?
- Where are they working?
- What technology, application or product is it about?

Besides this division in four main parts, there are some other copy guidelines. For example there is a complete survey of all the correct notations of data, reading marks, capitals, etc. An other part is a directory filled with standard copy boilerplates, ready to be copy-pasted by a user. A final part of the copy manual is a investigation how the nine qualities have to be expressed in the copy material.

The powerpoint presenation is designed with the lay-out of the current PANalytical website. The current website is designed within the EBL project, but not according to the new graphic EBL style by Eden. Because this is a copy manual, the only content of this manual is text.

Present:

Specific copy guidelines en example text boilerplates.

Not Present:

?



4.2.3 Imagery

Designed by: Eden

Medium: Paper

Format: Portrait A4 format

Language: Dutch/English

Date of review: Nov 5th 2004

The imagery⁵ manual describes which photo's should be used in different publications of PANalytical. The manual starts with some general guidelines for photography within PANalytical. After that part, there are examples of stockphotos that can and should be used in publications. These examples are divided in four categories: machines of PANalytical, materials, clients and imagination of the unique qualities. Oddly enough these qualities are not the same as the nine qualities of the EBL corporate design.

The manual is written in two languages. English and Dutch. The language is changing constantly within the whole manual. There is a very small table of contents. The example photos in this manual are all stockphotos. That's not the intention for the final manual, that should consist of authentic PANalytical photos. These stock photos are purely there for inspiration.

Present:

Example stockphotos.

Not present:

A image database of authentic PANalytical photos.

⁵ By reviewing of this manual, the manual was completed for 50%.

4.2.4 Web

Designed by: <theFactor.e>

Medium: Paper

Format: Landscape A4

Language: English

Date of review: Oct 28th 2004

In this manual there are specific descriptions of the design of the new website of PANalytical. The website of PANalytical is made with the content management system PublishHQ.

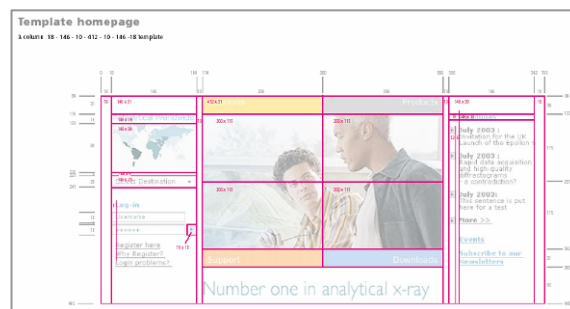


Figure 4.2.4.1 Web manual

The manual contains parts about navigation, templates, graphical elements and other components of the PANalytical website.

The information in these parts is very specific, with a lot of templates. There are dimensions, tables, size of fonts, etc. All specific information about the lay-out of the website. There is no guidelines for the content of the website. Maybe this content guidelines are found in the copy manual? The structure of the web manual is linear, divided in chapters and paragraphs.

The web manual is outdated. The graphical elements in the website do not match with the graphical guidelines from the EBL graphic manual from EDEN. This is because the website was made before the new EBL graphical standards arrived. At the moment there is a research how the lay-out of the website can be changed to correspond to the new graphical house style.

Present:

Specific lay-out dimensions website.

Outdated graphical guidelines

Not Present:

Content guidelines.

4.2.5 Product

Designed by: Van Berlo studio's
Medium: Paper
Format: Landscape A4 format
Language: Dutch
Date of review: Oct 28th 2004

In the product manual the guidelines for the next generation products are formulated. These guidelines are formulated on basis of the nine qualities from the EBL corporate design. The manual applies for all products produced from 2004 till 2010. In the manual there is more attention for the free-standing products then the

desktop products. That is the case because the research and development for the free-standing products is more intensive at the moment.

The product manual is presented as a manual that is in constant evolution. This will happen through constant additions and changes of the technical product developers. In a later stage the manual will be completed with design standards for specific product lines.

The product manual is a paper document of about 40 pages. In these 40 pages there are quite specific guidelines for the future line of products. The guidelines are given in text, 2D and 3D illustrations. The document has a linear structure, with chapters and paragraphs. The structure is simple. It starts with the whole product body and it ends with the small texts on the products. It goes from large to small.

Present:

General design standards for all products

Not present:

Specific product designs



Figure 4.2.5.1 Product manual

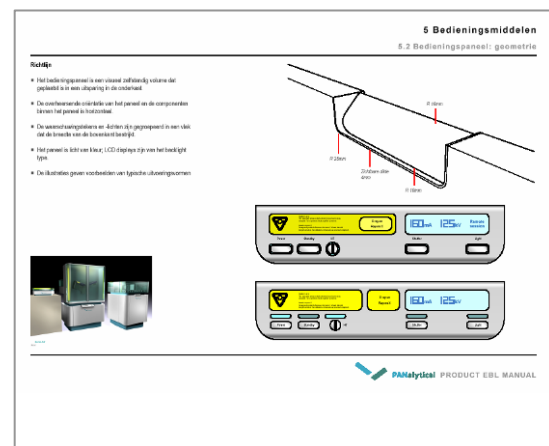


Figure 4.2.5.2 Text, 2D & 3D Illustrations

4.2.6 Booth

Designed by: WitDesign
Medium: Powerpoint presentation
Language: English
Date of review: Oct 28th 2004

In this manual guidelines are formulated for the design of PANalytical booths. These booths are used on congresses, exhibitions and other promotional activities.

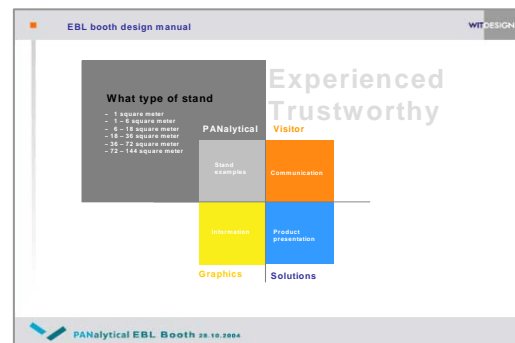


Figure 4.2.6.1 Booth manual

According to the manual from WitDesign there are four basic elements in a booth:

- 1) The Company
- 2) Products
- 3) Information
- 4) Communication

All these elements have to come back in a booth design. It's very important that first the company is presented and after that the products. *"Present the company, not just the products"*

The manual describes three levels of size of booths:

Level 1 Large: A large booth for big occasions. The booth has products, a presentation wall, meetingpoints etc. These booths are specially designed by a external bureau three a four times a year. On level 1 the manual serves as a reference for the external designer.

Level 2 Medium: A middle-sized booth, also called an 'Octanorm'. It's a standard box that you'll get as a company on some congresses. The surface is about 10 square metres.

Niveau 3 Small: Beauty case principle. To create with as few as possible objects an PANalytical booth. Think about a tablecloth or a instant background wall. On level 3 the manual serves as a specific instruction for creating the small booth. Level 3 is being used the most by far. (Around 70% of all the booths)

The final manual was unfortunately not available when writing this report. What's known is that the manual will also get a user-centered design like the copy manual. That means that the user of the manual will get a menu with some choices to make. A choice can be what size the booth will be. After the user makes that choice, he/she will get specific guidelines for that kind of booth.

Present:

Inspiration examples booth designs

Not Present:

Specific building instructions booth

4.2.7 User-Interface

Work in progress, not finished
Designed by Van Berlo Studio's

The User-Interface manual is not yet finished. This manual describes the lay-out and the structure of the software part of the PANalytical products. It describes what a future user will see on the screen of the PANalytical machine.

Present:
Nothing

Not present:
Everything

4.2.8 Facility/3D

Not finished

De Facility manual is not yet finished. This manual has to give guidelines for all three dimensional objects within PANalytical. Think about the whole carpark, the flags, the boarding, the teacups. Everything that is threedimensional. There is no design bureau assigned yet.

Present:
Nothing

Not present:
Everything

4.2.9 Behavior

Not finished

The behavior manual is not yet finished. But the manual has to describe the desired behavior of the personal of PANalytical. The behaviour that's necessary for the expression of the corporate identity to the outside world. The manual could contain the following things:

- code of conduct
- house rules
- values
- clothing rules

This ninth manual is considered as the icing on the cake in the internal branding process.

Present:
Nothing

Not present:
Everything

4 Manuals

4.3 Differences

The information from the current manuals has to be structured in a new navigation and look and feel to the intern and extern users. To come to a consistent navigation, the current inconsistencies between the manuals must be investigated. Because, without pointing out the differences, there cannot be a uniform design. In table 4.3.1 there is an first quick overview about the external marks of all the manuals.

Manual	Designed by	Media	Content	Structure	Language	Length
Graphic	EDEN	Paper	Text, Illustrations, Photos, Example lay-outs	Linear	Dutch	30 A4
Copy	Kapler communications	Powerpoint	Text	Non-linear User centered	English	100 A4
Imagery	EDEN	Paper	Text, photos	Linear	English/ Dutch	15 A4
Web	<theFactor.e>	Paper	Text, illustrations, Photos	Linear	English	20 A4
Product	VanBerloStudio's	Paper	Text, illustrations, Photos, 3D models	Linear	Dutch	30 A4
Booth	WitDesign	Powerpoint	Text, Photos, illustrations (2D & 3D)	Non-linear User centered	English	?
User-Interface	VanBerloStudio's	?	?	?	?	?
3D/Facility	?	?	?	?	?	?
Behavior	?	?	?	?	?	?

Table 4.3.1 External marks manuals

The various manuals differ in structure, lay-out, content and writing style from each other. These various differences will be discussed below.

4.3.1 Structure Manuals

There are major differences between the structure of the current manuals. This is an important difference, because in the new look and feel the structure of all the manuals has to be the same. There are two groups of manuals when it comes to structure.

4.3.1.1 Content based

The manuals *web*, *product*, *imagery* and *graphic* have a traditional linear structure. There is a table of contents which divides the whole manual in chapters and paragraphs. The way the contents are structured in the manuals do differ. This is because the manuals are addressing very different subjects. In the product manual information is structured on size. The manual starts with the design of the whole product and ends with small graphical details on the product. The graphical manuals is also somewhat structured on size. It starts with the building blocks (color, typography) and it ends with the products of the building blocks, the so called inspiration examples.

4.3.1.2 User Centered

The structure of the manuals *copy* and *booth* is fundamental different then the other manuals. Kapler Communications and WitDesign have taken the future use of the manuals into account. The manuals are designed with a user-centered design. What does the user want from the manual? For example, the copy manual starts with a couple of questions for the user: 'What are you going to write?', 'Who is going to read it?' If the user answers these questions, he/she will get specific guidelines and instructions for those area's. The user will reach the right information by clicking through a system of hyperlinks.

4.3.2 Information Manuals

The various sorts of information in the manuals are different from manual to manual. It's important that the future design can handle all sorts of information. In table 4.3.2.1 there is a survey of all sorts of information in the various manuals.

Manual	Text	2d illustrations	3d illustrations	2d photos	3d models	Dimensions	Grids
Graphic	X	X				X	X
Copy	X						
Imagery	X			X			
Web	X	X				X	X
Booth	X	X	X		X		
Product	X	X	X	X	X	X	
UI							
Facility/3D							
Behavior							

Table 4.3.2.1 Information in manuals

The manuals also differ in specificity. Some manuals do specify more than others. The manuals web and product give pretty specific instructions (dimensions in cm), while other manuals like imagery are only giving inspiration examples.

4.3.3 Layout Manuals

Because of the fact that the manuals are designed by different bureaus, there are quite some differences in the lay-outs of the manuals. The EBL corporate design standards have been taken into account, but still there are a lot of differences.

The lay-out of the manuals booth and copy do resemble the most. Both manuals have taken the lay-out of the PANalytical website as a foundation. The manuals do use the colors of the EBL corporate design. These colors are unfortunately out-dated. They have been replaced by the colors given in the graphic manual by EDEN.

The lay-out of the manuals product and web is very much the same. This is mainly because the structure of the manuals is the same, namely a linear structure. The typography and the colors of these manuals are not consistent with the guidelines from the graphic manual. The manuals imagery en graphic have also a very similar lay-out. Of course this is because the manuals are both designed by Eden. These manuals do have the right typography and color palette. Obviously this is the fact, because the manual graphic describes the typography and color palette.

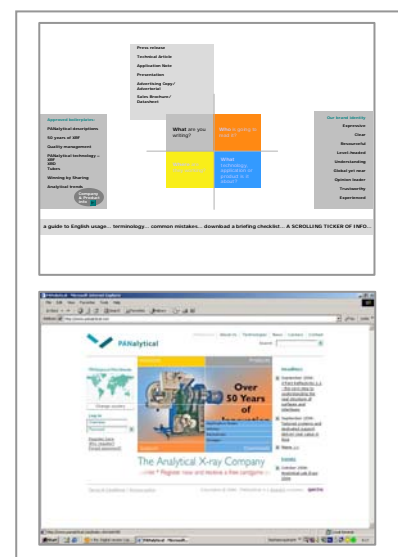


Figure 4.3.3.1 Similarities copy manual PANalytical website

4.3.4 Writingstyle manuals

What is striking, is the difference in language between the manuals. Three manuals are in English, two manuals are in Dutch, and one manual even uses both languages.

Obviously there is also a difference between the writing styles of the various manuals. They are designed by different bureau's and every bureau has his own tone of voice.

4 Manuals

4.4 Relations

Each manual describes a different aspect within the EBL project. But of course there are relations between all of the manuals. And these relations can become important in the new design. Some manuals have a large influence on other manuals, but other manuals are fairly independent. Below there is a visual survey of the relations between the manuals:

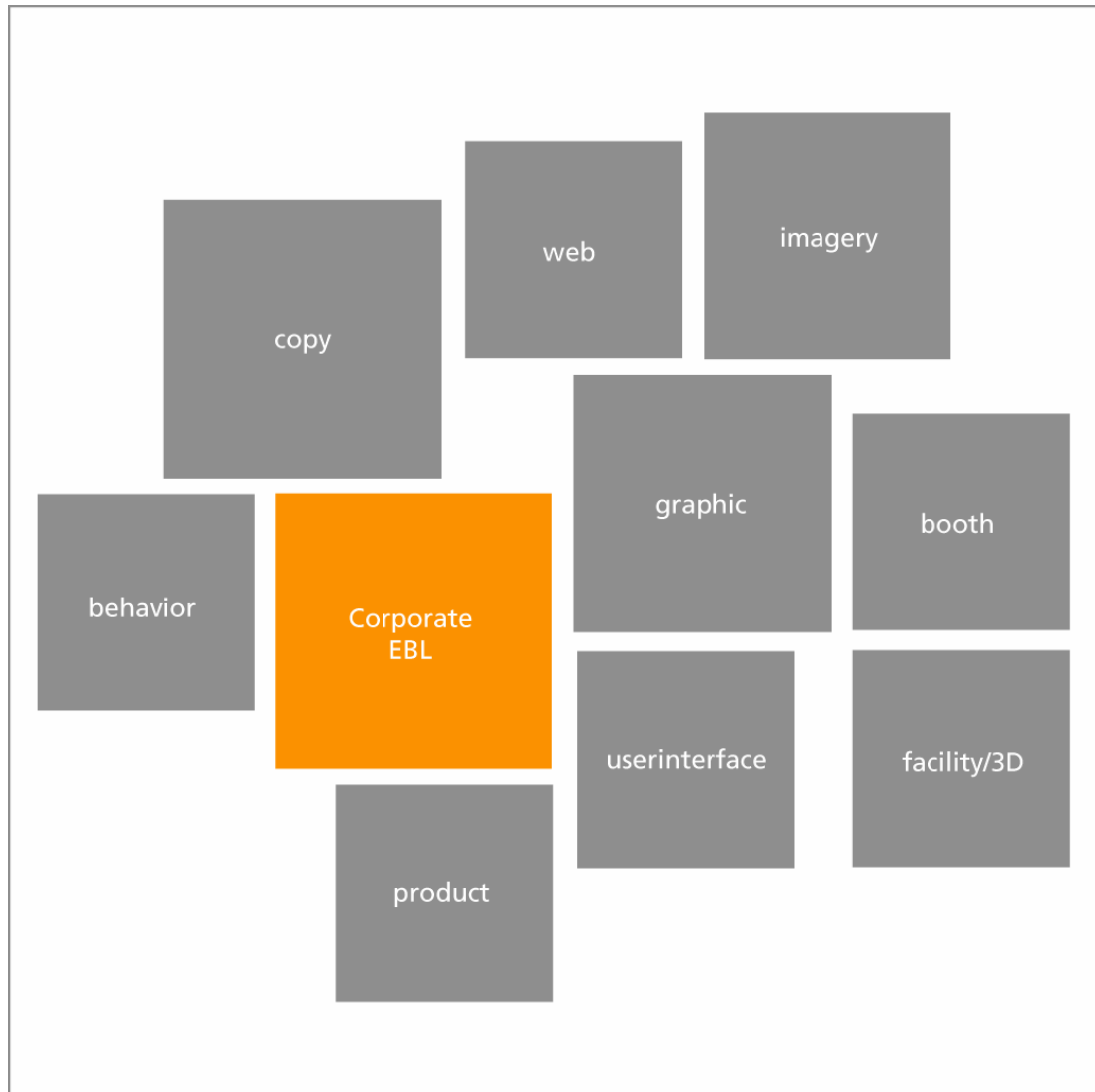


Figure 4.4.1 Relations between manuals

The first notably mark of this schematic drawing, is the position of the graphic manual. The graphic manual has an influence on five other manuals, which are web, imagery, booth, facility/3D and user-interface. In all these manuals the graphical elements come back from the graphic manual. The imagery manual is the only manual that has an backwards influence on the graphic manual. The product manual and the user-interface manual have a connection with each other, because the user-interface is a part of a product. The behaviour manual has an influence on the copy manual, because your desired behaviour must be expressed in your copy material. Imagery and copy have an influence on the web manual, because the website contains copy and imagery.

4 Manuals

4.5 Similarities

In the preceding paragraph all the inconsistencies between the manuals were described. And the number of inconsistency was not small. There were a lot of differences in structure, lay-out, content and writing style. But in the future look and feel there must be consistency between the manuals. So the current similarities will be more important for the future look and feel than the inconsistencies. Point is, it is much easier to find the numerous differences between the manuals, then it is to find the one similarity between all the manuals. But they do have a similarity that can be very important for the future structure.

4.5.1 Understand, Use & Create

In the preceding paragraph the differences in content were described. Each manual has different types of content in it, structured in a different way. But there is also a similarity in content between all the manuals. Namely the division between certain types of content. There are three types of content: Understand, Use & Create. This is the most important similarity between all the manuals.

4.5.1.1 Understand

The part with the largest audience but with the most basic information about the aspect in question. In this part there are the general thoughts and elements that describe the aspect in question. In the graphic manual this could be for example the basic colors and typefaces of the graphical style. The understand part is the part that is suitable for communicating also to the outside world. It is an introduction to the basic thoughts behind that specific design discipline. The understand part contains information that everyone (intern and extern) should and may know.

4.5.1.2 Use

In the use part we find practical templates that are used by a large group within the company. They're the products of the guidelines and elements in the create part of the manual. These are files who can used instantly by a larger group of common users. Examples of templates are the PowerPoint slide, stationary and copy boilerplates. The use part is for people within the company and maybe some external guest users.

4.5.1.3 Create

This is basically the largest part of the current manuals. But the information in this part will be used by a much smaller group of people then the 'use' and 'understand' parts. Within the 'create' part you will find guidelines and inspiration examples. Basically, all information you need to create the aspect in question. The only people who need this information, are the ones that are qualified to create the aspect in question.

This division in Understand, Use & Create comes back in every manual. In figure 4.5.1.1, the basic principle behind Understand, Use & Create becomes more clear.

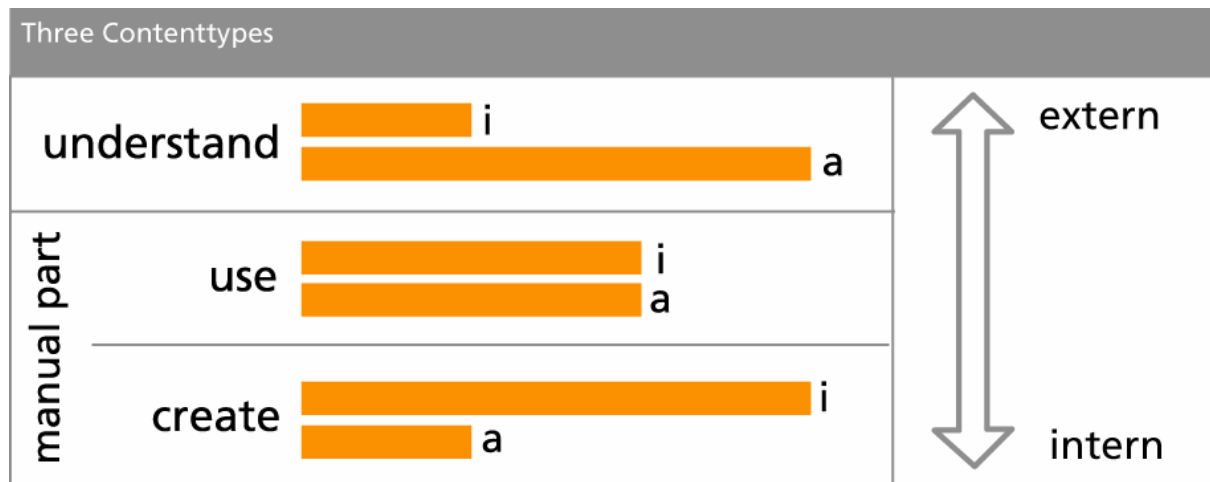


Figure 4.5.1.1 Three Contenttypes

Understand -> little information, large audience (intern & extern)

See - > more information, medium audience (mostly intern)

Create -> most information, small audience (intern & extern)

The use and create part form together the real 'manual part' with guidelines for using and creating the aspect in question. The understand part is much more a general informative part intended for a much larger audience.

4.5.1.4 Example

To clarify this division between understand, use & create, there is an example for the graphic manual.


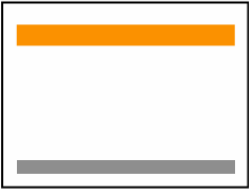
Content Types manual Graphic		
Understand	Use	Create
 <p>Element: color orange</p>	 <p>Template: PPT slide</p>	<p>"Orange should be the most prominent color"</p> <p>Specific guideline</p>

Figure 4.5.1.2 Example Graphic Manual

The basic element orange falls certainly within the understand part. It is part of the explanation of the graphical EBL style and can be explained to a large audience, also outside the company. A powerpoint slide is a perfect example of a template that falls in the use part of a manual. The slide is something that is used by a large group of people within the company. The final specific guideline is a typical example of information that falls within the create part. Only designers of graphic material will need this specific guideline.

4.5.2 Content types in current manuals

4.5.2.1 Ratio

The current manuals all have a focus on creating the aspects. But some manuals have more templates than others, and other ones contain only guidelines. Most manuals should get more practical in the future by adding more practical 'use' content for a larger group of internal users. There is an overview with the current ratio between understand, use & create and the desired ratio between understand, use & create. This overview is made by analysing the current manuals made by the various design bureaus.

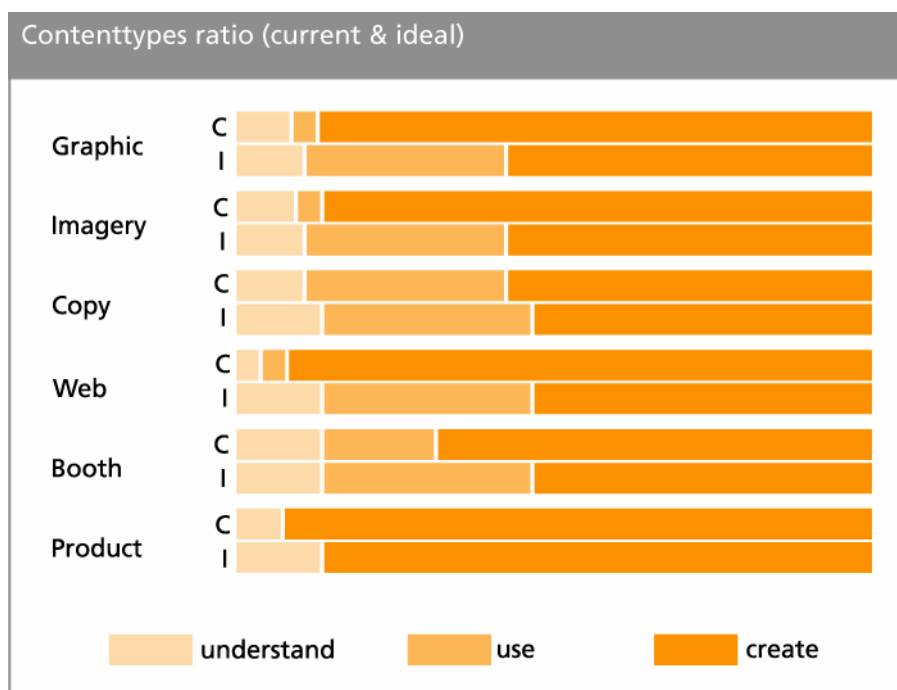


Figure 4.5.2.1 Contenttypes Ratio
C= current
I = Ideal

Most manuals should get more practical for the average user with the addition of use content. The biggest desired changes in content types are in the manuals Graphic, Imagery and Web. These manuals must become way more practical for everyday users. The manuals are now only useful for the designers of the materials. The amount of templates must be elevated, especially in the graphic manual. Templates like PowerPoint sheets, stationary, visiting cards are not in the current manual, but they have to be in the future look and feel. Otherwise no average PANalytical employee will ever use these manuals. The web manual should also be more practical in every day use. The current web manual is only about lay-out standards. There must be more practical guidelines such as content guideline. The content of the website is changing much more often than the lay-out of it.

4.5.3 Possibilities

The Understand & Use parts of the manuals are still somewhat underdeveloped. In table 4.5.3.1 there is an overview about the possibilities in the understand, use & create parts

Manual	Understand	Use	Create
Graphic	Colors Typography	PPT templates Stationary Visiting cards	Inspiration examples Grids Best/Worst practises
Copy	Copy philosophy	Copy boilerplates	Copy guidelines
Imagery	Basic image elements	Image database	Imaging guidelines
Web	Web philosophy	Content boilerplates	Content & Lay-out guidelines
Product	Basic product elements	X	Product guidelines
Booth	Basic booth Elements	Booth use guide, how to act on a booth? Booth build guide	Booth creation guide
UI	Basic product elements	X	UI Guidelines
Facility/3D			Facility guidelines
Behavior	Introduction to EBL Behaviour	Behavioral guide, code of conduct	Guide to affect behavior

Table 4.5.3.1 Possibilities U/U/C

4.5.4 Other similarities

Besides the similarity between understand, use and create there is another similarity between the nine manuals. They have all been created with the EBL corporate design as a basis. The nine qualities from the EBL corporate design were given to the design bureaus as a starting-point. So all the nine manual have been created on basis of the same EBL standards.

4 Manuals

4.6 Recommendations

In this paragraph there is a look in what has to happen to make a consistent whole of all the manuals. There are a lot of inconsistencies between the manuals, and they have to disappear in the new look and feel. There has to be a general 'canvas' where all sorts of information of the manuals will fit.

There will be recommendations for changes in structure, content, lay-out and writing style.

4.6.1 Structure

Inconsistency :

The structure of the manuals differs (content based/ user-centered)

Recommendation:

Restructuring all the manuals with as result a unambiguous structure. The division between understand/use/create content should be important in structuring the information. A user-centered approach is preferred above a content based approach. The user-centered structure is preferred, because usability is one of main criteria of this project.

4.6.2 Content

Inconsistency: Different sorts of information (text, illustrations, 3d models)

Recommendation: The new design has to be compatible with all sorts of information.

4.6.3 Lay-out

Inconsistency: The lay-out of the manuals differs

Recommendation: Follow the guidelines from the graphic and web manual for a new lay-out.

4.6.4 Writing style

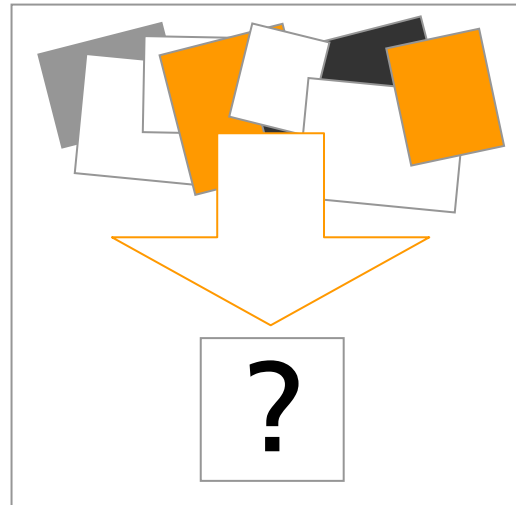
Inconsistency: Different languages (Dutch/English)

Recommendation: First only use one language: US English, because PANalytical is an international company.

Inconsistency: Writing style of the various manuals differs.

Recommendation: Rewrite the manuals following the guidelines in the copy manual.

The differences in structure will probably produce the most work in the design trajectory.





Communicate

5

5 Communicate

5.1 Communication media

A important part of this assignment is to find the best navigation for the information from the manuals. There has to be a fixed 'canvas' or 'platform' where the information from the manuals will be available. When we are looking for the best navigation method, we must keep in mind the demands of the various users from the manuals. In this paragraph there is a look into the various communication tools that are available for communication of the information from the manuals.

5.1.1 Paper

Printed versions of all the manuals

Pro's:

- Tangible
- Cheap
- Easily available, you don't need electricity

Con's:

- Almost no flexibility
- Threshold to read
- Easily damaged
- Takes a lot of space
- Hard to find the right information
- Linair structure, not very practical
- Distribution
- Version-conflicts
- Access problems, who has access and who hasn't?
- Not possible to make easy connections between the nine manuals.



5.1.2 CD/DVD application

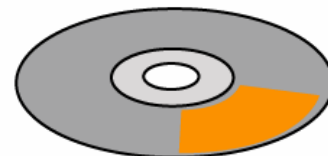
A tangible digital medium that you can access from a computer.

Pro's:

- Tangible
- Easy to find the right information
- Easy to combine information from different manuals
- Easy to reproduce

Con's:

- Moderate flexibility
- Easily damaged
- Only access through a computer
- Distribution
- Version-conflicts
- Access problems, who has access and who hasn't?



5.1.3 Online application

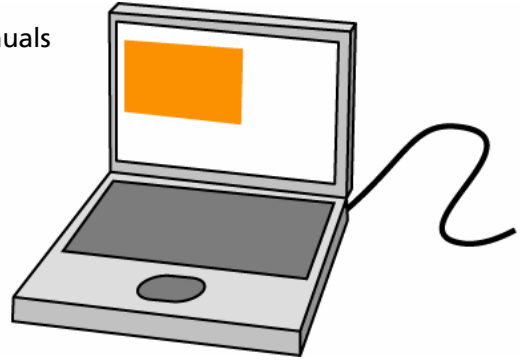
An online application that is accessible on the intra- or internet

Pro's:

- Flexibility
- Everywhere accessible
- Easy to find the right information
- Easy to combine information from different manuals
- Distribution
- Version management
- Advanced user rights system

Con's:

- Not tangible
- Possible security risks
- Only access through a computer



5.1.4 Choice

An online application is preferred above all other communication tools. The online application has SIX major advantages that the other media don't have. They are discussed one by one below.

Advantages online application:

- **Distribution**
An online application has major distribution advantages above the other mediums. With one mouseclick you can distribute all the manuals in the whole worldwide organisation of PANalytical. With another one mouseclick you can replace an old version with a new version worldwide.
- **Flexibility**
An online system is the far most flexible medium. When you do have paper or digital cd-rom versions of the manuals, you have to press new ones if something in the manuals changes. The old version becomes garbage. With an online system, when you make a change, the old version simple disappears for the users.
- **Access from everywhere.**
The only thing you need for access to the manuals is a pc with an internet/intranet connection. You don't need to send the manual material to possible external users, they can access it through the internet.
- **Navigation**
An online application is perfect for the preferred user-centered design (as seen in the booth and copy manual). Such a design is not possible in a paper manual. It is possible in a CD-ROM version though. But the navigation of an online application is still preferred above a cd-rom version, because there are possibilties to combine an online application with current online applications like the corporate website or the PANalytical intranet.
- **Version control system**
There is no need for a psychical archive were all the old versions of the manuals are stored. The old versions are automatically stored in a digital archive when someone makes a change in the manual.
- **Workflow management system**
The online application is one and only medium to give different users different rights in a easy way. You can build a workflow management structure where each user has specific rights. This is not possible with an paper or cd-rom version.



This six advantages distinguish the online application from the other two media. There is still one disadvantage compared to a paper version. The online application is not tangible. You can't take it with you as a piece of paper and sensory perceptions as touch are not possible in a digital environment. This could be a problem in for example the facility manual, where you want to have physical samples of cloth. Therefore there should always be a paper version of the manuals still be available, possibly with physical samples if needed. There could be a reference from within the online system to these physical samples.

6 Communicate

5.2 Online application

So there is a choice for an online application. But what does that mean, online application? There are several possibilities for communicating the information online within PANalytical. All these online services got their advantages and disadvantages. In this section we will investigate which online application is preferable above the others. First there is a list of demands that the application must fulfil, and then there is a look which application fits the profile.

5.2.1 Demands

There is a list of demands that the online system should satisfy. This list of demands of the application is formulated below.

- Lay-out
 - The application must be capable of displaying a lay-out conform to the EBL graphical house style.
 - The application must be capable of displaying all sorts of content of the manuals (text, images, 2d illustrations)
- Structure/Interface
 - The application must be able to handle a user-centered interface (like the powerpoint examples of the manual booth and copy)
 - The application must can handle a search function.
 - The application must be capable of creating a flexible and intuitive user-interface.
- Content/User Management
 - The application has to be capable to recognize different users (internal/external) and give the users certain rights (accessibility certain sections, edit rights)
 - There must be some kind of version control
 - It must be a content management system with workflow possibilities.
- Access
 - The application must be accessible for external users like guest users or the general public
 - The application must be accessible for internal users
 - The application has to be capable to secure the classified sections of the manuals.

5.2.2 Available online applications

There are basically two online applications already available within PANalytical. Why search and pay for a new application if one of the current applications can do the trick. The two applications are called PublishHQ (PHQ) and Lotus Notes. PHQ is used for the PANalytical internet site. Lotus Notes is used for the PANalytical Intranet. They are both Content Management Systems (CMS) and they are discussed below.

5.2.2.1 PublishHQ Internet

PublishHQ is the name of the Content Management System in which the current PANalytical website is built. The system is developed by a external webcompany called <theFactor.e>. They made also the accompanying web manual for the current site. The PublishHQ is system is used by internal employees to keep the website up-to-date. The PHQ application makes it easy to manage all the data that is on the site. Employees can't change the lay-out of the site with the PHQ system, only the content.

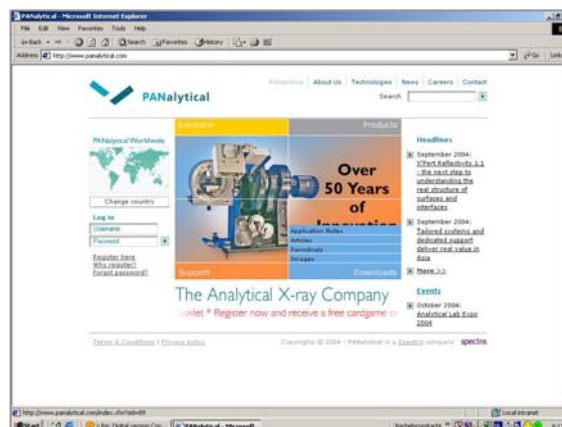


Figure 5.2.2.1 PANalytical Website made with PHQ

5.2.2.2 Lotus Notes Intranet

This system is used for managing the intranet of PANalytical. On this Intranet a lot of useful information is placed for employees of PANalytical. The latest news from the company is available, there is a address book of all employees of PANalytical. You can also find a lot of documents and announcements of all the departments within PANalytical. The intranet is basically a 'reservoir' of all sorts of data that could be useful during a normal working day. The application can be accessed from every working place within PANalytical through the internet explorer. At the moment there is no possibility to access the system from a computer outside the PANalytical internal network.

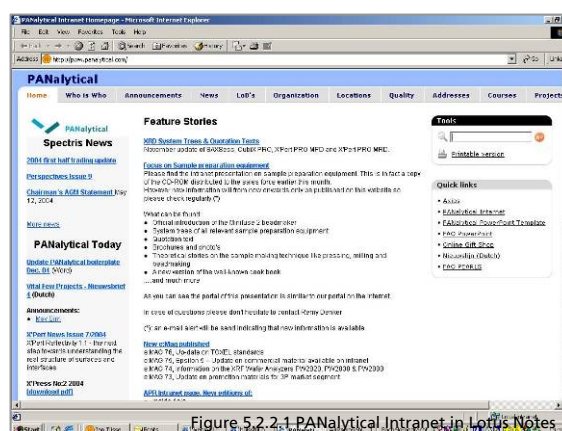


Figure 5.2.2.1 PANalytical Intranet in Lotus Notes

5.2.3 Choice

Together with company webspecialists Reiner Sulter (Lotus Notes), Kim Bekhuis and Raymond Oude Wolbers (PHQ) the demands in comparison with the functionality of the two current online applications were discussed. Both applications will satisfy most demands on the area's of user management and content management. They are both capable of displaying all kinds of content. But PHQ is the superior when it comes to external access possibilities and lay-out possibilities. And PHQ has much more intuitive and flexible navigational and structural options. In PHQ you can get your wanted information on a number of ways in a very intuitive way. PHQ has already proven this in the corporate website.

Demands Online Application		
	PHQ	Lotus Notes
Handle all content sorts	✓	✓
Search function	✓	✓
Version control	✓	✓
User management	✓	✓
Workflow control	✓	✓
External access	✓	✗
EBL Lay-out	✓	✗
Usability	✓	✗
Intuitivity	✓	✗

Table 5.2.3.1 Demands Online Application

Lotus Notes has a far more inferior intuitivity. Employees find it very difficult to find the needed information in Lotus Notes. The PHQ application works on the Internet, so external access will be no problem. With the collaboration with <theFactor.e> it will take less time to convert the current website templates to EBL templates. Lotus Notes is an intranet application and external access will be a problem. It will take a lot of more time to make the Lotus Notes system compatible with the external access demand and the lay-out demands. It did become clear that the PublishHQ CMS application is preferable above the Lotus Notes intranet application. The only one factor that Lotus Notes can be become the preferable application, is the cost factor.

Choice:

PublishHQ content management system.

6 Communicate

5.3 Market Survey

On the Internet there are numerous Corporate Identity sites from various companies and institutions. The public accessible sites give an overview of the corporate identity of the company in question. Things like the company strategic intent and corporate values. On most sites you can even find the design principles and brand standards. Logo's, colors, typography and other standards are available for the general public. Most available material on these sites belongs to the graphic manual and to the EBL corporate design. Below four examples of CI sites are discussed.

5.3.1 City of Amsterdam Stijlweb

Date of review: Nov. 17th 2004

Very extensive site with a strong main point on the graphic part. The site is very flexible, there are often updates. The site is roughly divided in five sections: Introduction, Approach, Buildingblocks, Means, and Sub areas.

The Introduction section has strong similarities with the general EBL corporate design. Corporate values and corporate culture are being addressed in this section. There are also seven core qualities of the city of Amsterdam in this section. That sort of formulation strongly resembles with the formulation of the nine qualities of PANalytical.

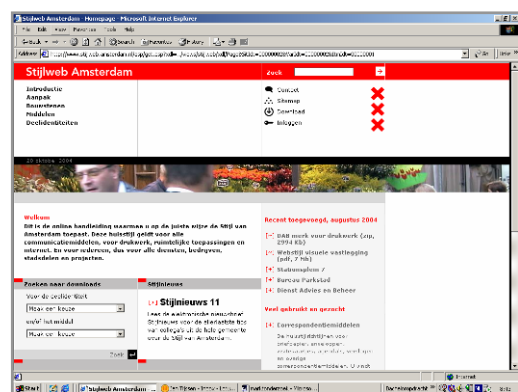


Figure 5.3.1.1 Homepage Amsterdam Stijlweb

In the Approach section of the site we find some 'steps plans' in how the new style should be implemented in the different parts of the City of Amsterdam. This is really a practical guide for application of the new style.

In the Buildingblocks section we find all parts that together form the graphical house style. These are the logo, the use of colors, the typography, use of images and grids. The part 'use of images' has a strong resemblance with the Imagery manual within PANalytical.

The section Means gives us an overview of all the means in which the new house style is applied. The means are divided in three categories: press, electronic and three-dimensional. All the press and electronic means can be downloaded by everyone for practical use. The three-dimensional means have similarities with the content of the Facility/3D manual within PANalytical.

Ik ben typisch Amsterdam:
vindingrijk,
initiatiefrijk,
gedurfd,
geloofwaardig,
vriendelijk,
duidelijk en direct,
authentiek

Figure 5.3.1.2 Seven qualities Amsterdam

This site is for accessible for everyone. There are no parts that are restricted. Probably this is a conscious choice of the City of Amsterdam. The city belongs to everybody, and so does the identity and the style of the city.

Information available of similar PANalytical manuals:
EBL corporate design, graphic, behaviour, copy, imagery, facility/3D

5.3.2 Akzo Nobel

Date of review: Nov. 18th 2004

Akzo Nobel is a company that stands nearer to PANalytical than the City of Amsterdam. Akzo Nobel has a more sober and less structured corporate identity site than the City of Amsterdam.

De left column of the site is filled with unstructured table of contents. It contains a lot of different sections of AKZO Nobel in which the house style is expressed. It goes from stationary to the car park. A good structure is missing. By various sections, there are publicly available downloads. Everybody can download most documents, without any registration or login system.

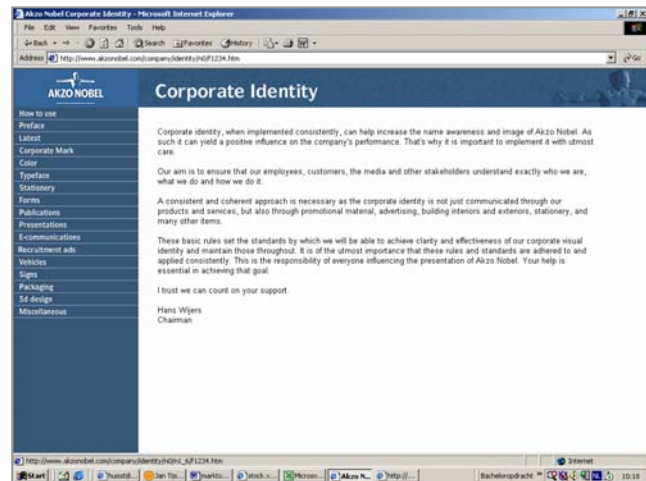


Figure 5.3.2.1 Homepage Akzo Nobel CI site

After manually searching the site (it has no automatic search function) it seems that there is information on the site similar to the manuals copy, graphic, web, booth and facility/3D. There is no description about the general corporate design. It seems that this site is purely for the intern users within AKZO.

Information available of similar PANalytical manuals:
Copy, graphic, web, booth and facility/3D

5.3.3 DSM

Date of review: Nov. 18th 2004

DSM is in about the same market than AKZO Nobel. They are both industrial companies. DSM has decided to integrate the corporate identity site into the main DSM website. This is really different than the other two discussed sites. The most parts of the DSM corporate identity site are password protected. Not everything is accessible for everyone. In the public part you find the house style and the corporate strategy. This information is similar to the graphic manual and the EBL corporate design. Since there is a lot closed of on this site, there can't be said which manuals are in there.

How to use
Preface
Latest
Corporate Mark
Color
Typeface
Stationery
Forms
Publications
Presentations
E-communications
Recruitment ads
Vehicles
Signs
Packaging
3d design
Miscellaneous

Figure 5.3.2.2
Unstructured list of
items

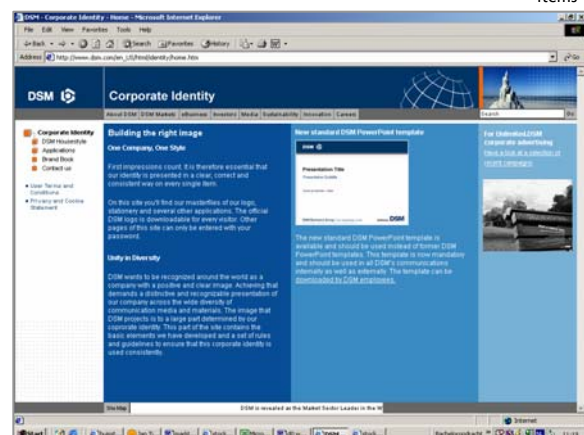


Figure 5.3.3.1 Homepage DSM CI site

5.3.4 Raytheon

Date of review: Nov. 26th 2004

Raytheon is a large American defence company. They develop all sorts of military equipment, like radars, missiles, aircraft. They also have a corporate identity site purely for their own employees, but for some reason it is publicly accessible. The corporate identity site is pretty extensive. The frontpage as has structured table of contents divided in three categories: 'Logo, Tagline and Identifiers', 'Guidelines' & 'Templates'.. In the first section you will find all the identifiers, for example the logo, that identify the company. The Guidelines section gives a lot of textual and graphical guidelines to design a lot of things, like presentations, web design, imagery. The Templates section contains various downloadable templates like a powerpoint slide, stationary, email signatures etc. Basically the whole site has the same structure as the City of Amsterdam Stijlweb.

Section	City of Amsterdam	Raytheon
1	Building blocks	Identifiers
2	Approach	Guidelines
3	Means	Templates

Table 5.3.4.1 Same structure Amsterdam and Raytheon

5.3.5 Conclusions

The market survey brings up the fact that that there are some choices that have to be made when communicating your corporate design online. The most important choices in a row:

- Which information is suitable for communicating outside the company?
- Integrate in the current website or not?
- The structuring of the information, how do you present it to the users?
- Flexibility, in which extent may users edit the information on the site?



Users

6

6 Users

6.1 First overview

If the manuals are going to be implemented in a new design, a lot of different users will hopefully going to use the manuals. Who those people are must have an implication on the design of the new look and feel for all the manuals. In these paragraph there is a first survey of which intern and extern users are going to use the various manuals..

6.1.1 Intern

The manuals will first be communicated to all employees of PANalytical. These are the intern users of the manuals. The communication of the manuals to the employees is part of the internal branding process. In this internal branding process the employees of PANalytical have to come to know the corporate identity of the company. Because, if your own employees don't know it, they also won't express the identity to the outside world. And then your corporate identity will fail miserably.

The communication of the corporate identity to your own employees is a complex process, especially if changes are needed. Employees that are working for PANalytical for about 20 years will probably meet these wanted changes with some scepticism. More will follow on this problem in a later stage. The art of a successful internal branding process is to make your employees see the cause of the whole process. Therefore an analysis of all the intern users within PANalytical is crucial for a successful internal branding process.

6.1.1.1 The organisation

Within PANalytical there are dozens of departments that all have different tasks. Different tasks demand different information from the various manuals. Below there is a global structure of the whole organisation of PANalytical:

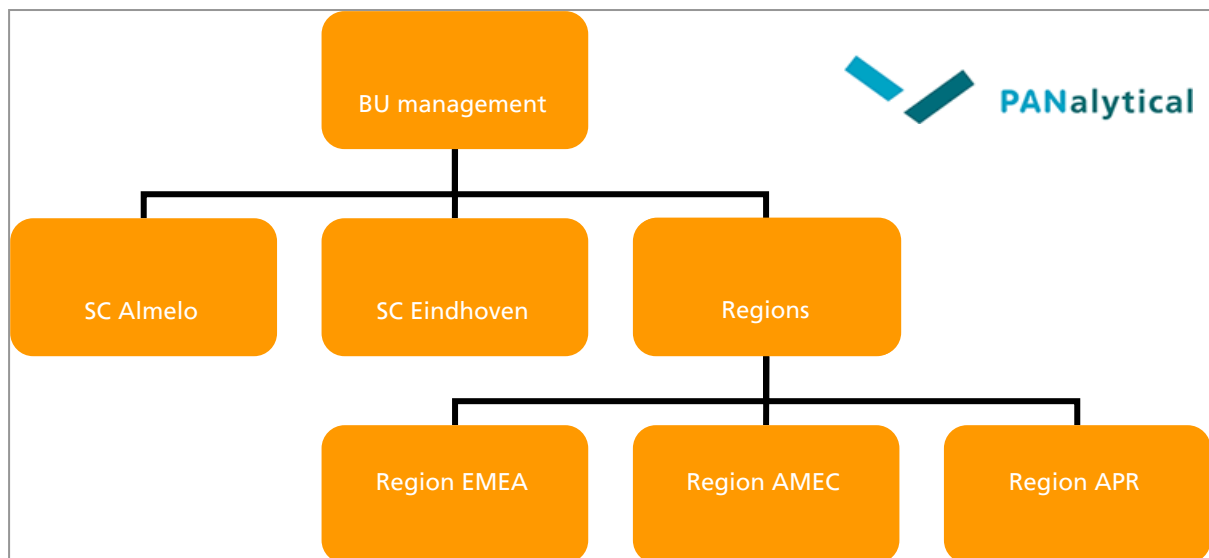


Figure 6.1.1.1 Organisation PANalytical

In the organisation chart the BU management is standing above all. The BU management gives the main direction over the company. Below the BU management, there are the Supplycenters. There are two supplycenters, one large one in Almelo and one small one in Eindhoven. The supplycenter in Almelo is also the company headquarters. Finally there are the regions, the international aspect of the company. Together the three regions cover the whole world. APR stands for Asian Pacific and Australia. AMEC stands for North-, South- and Middle-America. EMEA stands voor Europe, Africa and the Middle-East. Every region has his own Sales and Service organisation and they operate quite independent from the supply centers.

BU Management

First the structure of the BU management. The management is, with all due respect, a small group within the whole company. But the management needs to deliver the EBL message to all of the PANalytical employees in the different departments. Therefore the structure of the management is important during the internal branding process.

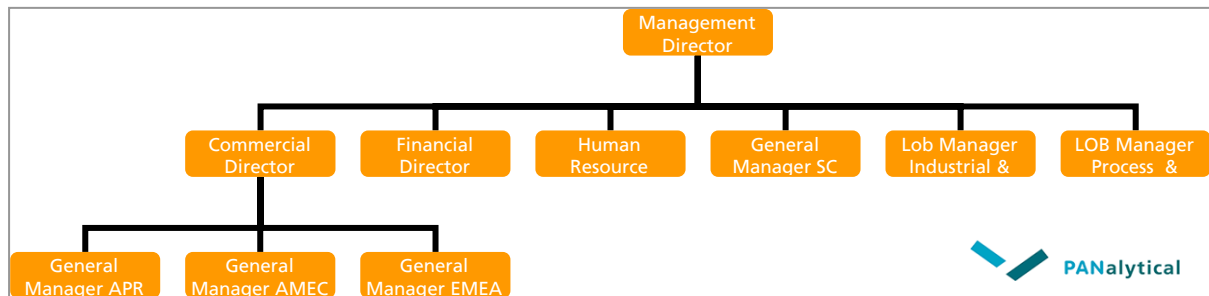


Figure 6.1.1.2 BU Management

Especially the commercial director and the human resource director will have a larger role in the internal branding process.

SC Almelo

The supplycenter in Almelo is by far the largest place of business of PANalytical, with the most employees. In Almelo all products are developed and constructed. It's also the head quarter of the company. SC Almelo consists of a dozen departments that all have specific needs of the manuals.

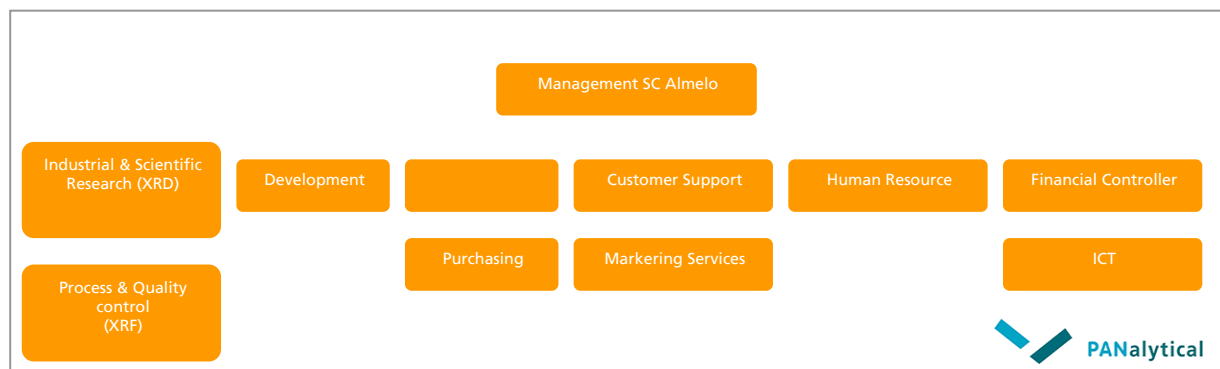


Figure 6.1.1.3 SC Almelo

SC Eindhoven

The SC Eindhoven is much smaller than the SC Almelo. In this supply center the tubes for the x-ray machines are fabricated. The SC Eindhoven is all about production of materials, but it also has a small development department.

Regions

The three regions are there for sales and service. The regions all have roughly the same organisational structure. Every region has its own regional management. All the countries in a region have also got a national management. Each region has its own marketing department. The employees in the region's are also going to use the manuals. This brings in extra problems like distribution and the adjustment to local cultures.

Now we have some insight in the organisation of PANalytical we can look which manual is going to be used by who in the company. Firstly, we can make a rough difference between the manuals. Some manuals will have a broad intern audience and some manuals will have a small intern audience.

The manuals product, web, booth, facility/3D & user-interface will never be interesting for most employees. This is because these manuals are for very specific aspects within the company.

The opposite is true for the manuals copy, behavior, graphic, imagery and the EBL corporate design. In these manuals you'll find information that can be important for every single employee at PANalytical during the daily working process.

Broad intern audience

Corporate EBL
Imagery
Copy
Behavior
Graphic

Specific Intern Audience

Product
Web
Booth
Facility/3D
User-Interface

6.1.1.2 Intern audience by manual

All manuals have a specific intern audience where they are intended for. In this paragraph there is a first concise overview about the possible internal users. This overview is about the use and create parts of all the manuals. The understand part of all the manuals does not have a specific audience, and should be available for everyone.

Graphic

BU management
SC Almelo
SC Eindhoven
Regions

The graphical manual describes the house style of PANalytical. This house style needs to be implemented in the whole company. The style is expressed in stationary, powerpoint slides and visiting cards. Everyone in the company uses these things.

The manual also describes how stationary etc. should be designed with building blocks and inspiration examples. This information, belonging in the create part, is only useful for the DTP employees within PANalytical.

Imagery

BU management > Commerical Director
SC Almelo > Marketing Services > DTP employees
Regions > Marketing Services > DTP employees
All Employees

The imagery manual will have a broad internal target group. Everyone who makes an presentation for example will need imagery and should therefore use the imagery manual.

Copy

BU managment
SC Almelo > Copywriters
Regions > Copywriters

The copy manual has a broad public within PANalytical. Everyone who's writing copy, will do good if he/she consults the copy manual.

Web

BU management
SC Almelo > Marketing Services > Webmasters
SC Almelo > ICT
Regions > Marketing Services > Local site webmasters

The web manual will be used by a small specific audience within PANalytical. The web employees in the SC Almelo will be the prominent users of it. Besides them, the webmasters for the local sites will probably also use this manual.

Product

BU management
SC Almelo > Development
SC Almelo > Marketing Services

The product manual has also got a specific internal target audience. The employees that are directly or indirectly are involved in product development will have to consult this manual. The product manual also has the highest classified status of all the manuals, because the information in it can be interesting for concurrent companies.

User Interface

BU management
SC Almelo > Development
SC Almelo > Marketing Services

The user interface has the same specific internal audience as the product manual. The only difference can lay within the departments that have access.

Booth

BU Management > Commercial Director
SC Almelo > Marketing Services
Regions > Marketing Services
Booth workers
Visitors conferences

The Booth manual has a small internal target group. Only the people who are directly involved in the organisation and building of booths will consult this manual. Also someone who needs the PANalytical beauty case for a conference, will use the booth manual.

Facility/3D

BU Management > Commercial Director
SC Almelo > Marketing Services

The facility/3d manual has also a small internal target group. Only the people who are actively involved in the creation of EBL elements in the facilities should consult this manual.

Behavior

The Behavior manual must be read by all employees. This manual should have the largest internal audiences by far. The behavior manual defines how the brand PANalytical should be expressed in the daily practise. The employees have to read this manual to understand the line of thought behind the EBL project.

6.1.2 Extern

After the EBL manuals have been communicated to the intern users, they also can be deployed to possible external users. Below you will find an concise overview of all the manuals with the possible external users. Also this overview is only for the use & create parts of the manuals. The understand part is intended for a large not specific audience.

Graphic

External graphic designbureaus

Imagery

External graphic designbureaus
Printing offices
External photographers
External press

Copy

External PR bureaus
External consultants
External copywriters
External press

Web

External webdevelopers

Product

External productdevelopers
Suppliers materials products

User-Interface

External UI developers
Suppliers materials UI

Booth

External boothdesigners
Boothbuilders
External workers booth
Suppliers materials booth
Organisation congresses/exhibitions

Facility/3D

Suppliers materials facilities
External facilities designbureaus

Behavior

External consultants

Also with the extern users there are differences in de breadth of the audience. Most manuals also have a limited external audience. The external users will need information from these manuals on a incidental basis, mostly when PANalytical hires them for a job. This group of external users should have temporary access to the manuals.

6 Users

6.2 Usermapping

There is now a first basic idea of which people the manuals going to use. That was the easy part. But now the difficult part. In this paragraph there is an investigation about when and where exactly the different intern/extern users will need information from the manuals. This facts will surely have an tremendous impact on the future navigation of the manuals. The navigation has to be practically orientated towards the future internal and external users.

First of all, the mapping of all the moments of all different users when they will maybe consult the manuals is a huge job. Even more complex is the fact what kind of information they will need and what rights the different users will have to possible edit the information in the manuals. The trick is to keep a complex process like this so simple as possible!

The situation is as follows:

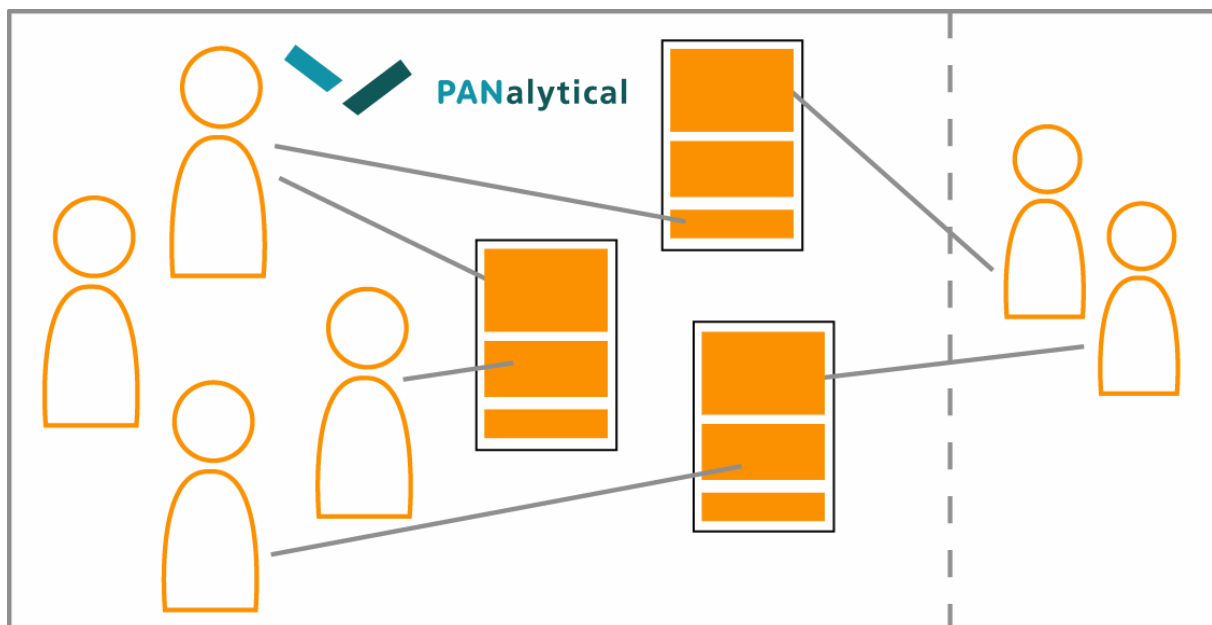


Figure 6.2.1 Different Users, different needs

Different (internal or external) users have different needs from one or more manuals. The new look and feel should be flexible so all the needs of users are satisfied. The first division is made very quickly: the division between external and internal users. This division is holds good for every manual. Now we must make further structure in the different users. You can take this problem from two sides. One: you go out from the manuals. Two: you go out from the users. There was a choice to go out from the manuals first. This is because there are more much more different users then there are different manuals. So if you must start somewhere, start with the manuals.

6.2.1 The Manual User map (MUM)

The MUM (Manual user map) should give an well-ordered overview of all the users of a certain manual. The MUM also summarizes what parts of the manual are accessible for the user and which rights certain users have for a part of the manual. For example, can they edit information or can they just read it? The user map should give a fully overview of all the needs and rights of all different users of a manual.

There are two major divisions made in the MUM. First of all there is the familiar division between internal and external users in the user map. This difference goes up for all manuals and could easily be implemented in the user map. This internal/external difference is a fundamental difference that must be made in all parts of the manuals.

6.2.1.1 Manual Parts (Use & Create)

Not the internal/external division but the division between different content types of the manual is the most important division in the user map. This fundamental difference in content (use & create) comes forward in the MUM.

First of all, as mentioned in 4.5.1, all the content that falls in the 'understand' part of the manuals is accessible for a large non-specific audience in the public part. Therefore the understand part isn't mentioned in the user map, because simply there is no need to mention that everyone on the world can access that part.

The use & create parts that fall in the manual part do need specific users assigned. These parts are mentioned in the MUM. There is always a basic division between use & create in the usermap. But all these manual parts can be specialized further as far as you want. A part of the 'create' section can be: 'Guidelines', but it can also be 'Guideline 1.3.2'. If the specialisation is needed for different users access and rights, the specialisation can be made. A simple guideline must be taken in account:

'Only specialize when needed'

If you don't specialize at all, the only division in content in the user map is the division between use & create content. Sometimes when there is no use content, like in the product manual, there is only a create part.

6.2.1.2 User Layers

For each subpart of a manual the different users and their rights are described. Users can be described in a number of ways in the MUM . This are the different User Layers.

The User Layers difference in breadth. They can be described personally when it's necessary, but when it's not necessary they can be described as a large group of persons. There are basically 5 levels of internal users layers. They start from very specified (Person) to very broad (All Employees). For this part the same guideline applies, only specialize when needed. For Example: You can add 'All Employees' as a user of a certain part of the graphic manual. This automatically means that all employees can access this part of the manual within the new look and feel. If you have a part that only can be accessed by one user, you specify him/her as a person to that part.

The user layers only concerns the internal users. External users don't have a user layer structure, because there is no layer structure with the external users. The only external users of the use & create parts are temporary guest users and external editors that don't share a layered connection.

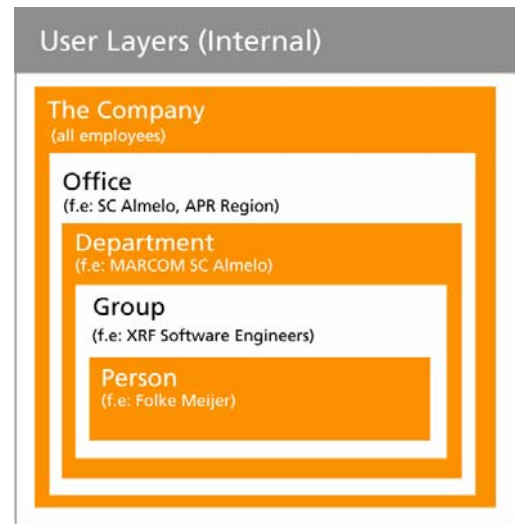


Figure 6.2.1.2 User Layers

6.2.1.3 User Rights (Workflow management)

The rights of the different users are also divided in a number of categories. This difference in rights will define a workflow management system. Most of the users will have the basic 'reader' rights. Reader rights simply means that you have access to the information, but you cannot directly edit it.

Reader

Read-only access to certain parts of a manual.

A small group of people will have more rights for a certain manual. They become the Manual Task Force (MTF) This small group will have edit rights for a manual and they are responsible for keeping the manual up-to-date.

The Manual Taskforce has three different roles in it:

Owner

The ultimate 'boss' of the manual. He/She owns the whole manual and is responsible for the content in it.

Publisher

The publisher is mandated by the owner, to publish the proposed changes made by the editor(s). The publisher role is optional.

Editor(s)

The editor(s) will do the daily editing part of the manual to keep the manual up-to-date. All there changes need to be approved by the publisher or the owner. An editor can be external, for example the manual original author. (EDEN or Van Berlo) Editor rights can be assigned to merely a specific section of a manual.

The publisher and editor rights are optional, the owner right is compulsory. There must be a owner for each manual that is responsible for the content in it. The publisher and editor roles are highly advised, because otherwise the manual owner needs to do all the work to keep the manual updated.



Figure 6.2.1.3 Manual Task Force

6.2.2 The Personal User Profile (PUP)

“The pup follows the mum”

For each manual there is an overview of all the users with all their rights, in the Manual User Map. But to get an complete overview about all the users, there is the Personal User Profile. Now the manual doesn't take the center stage, but the user. The Personal User Profile is kind of a product of all the Manual User Maps combined. If you are a certain person, all your access levels for each manual will be combined on this sheet. This Personal User Profile will be the perfect overview when giving someone rights in the future system.

The PUP is for the internal users of the manuals. All the different parts of all the manuals to which an user has access to will be ordered in to the 5 different user layers: The Company, Company Part, Department, Group of persons and Person. Obviously, this division is made on basis of the difference in the user layers, also seen in the MUM. This is a useful division because you can easily make a difference between basic access levels that apply for all employees (The Company) and personal access levels that only apply for that specific user.

With this division you will automatically get a 'basic access' profile that applies for every employee within PANalytical. This basic access level is a sort of standard that you'll receive anyway when you work at PANalytical.

The personal access levels start on top op the PUP and al the way down there are the 'all employees' access levels. So your personal user profile is really build up with your personal access levels on top.

External guest users also get a PUP, but not with the user layer structure. The PUP for a external guest user is just a summary of all his/her personal access rights for certain manuals.

The PUP follows the MUM					
		Manual User Maps			
		graphic	imagery	copy	web
Personal User Profiles	Folke Meijer	✓	✓	✓	✓
	Henk Gort	✓	✓	✗	✗

Figure 6.2.2.1 The MUMPUP System

6.2.3 MUM Product Manual


The Manual User Map is fully worked out for the product manual. The worked out Manual User Map is attached to this report. This Manual User Map is worked out together with future manual owner, E. Reuvekamp, manager Development of PANalytical. The whole product manual falls in the create part. There is currently no information in the product manual that falls within the use part.


E. Reuvekamp also decided that there is no specification within the manual part. All people that may access the manual part, have access to all (create) content. The guideline 'only specify when needed' has been taken into account. Reuvekamp did find that no specification at all was needed.

Manual User Map
Product
v1.0 10-12-2004

Manual Taskforce

Owner: Eugene Reuvekamp
Editor (external): Van Berlo





Create (Products)		
	Internal	External
All	Dep: Development	Com: Van Berlo
	Dep: Marcom	
	Dep: BU management	

Approved by E. Reuvekamp




Figure 6.2.3.1 MUM Product Manual

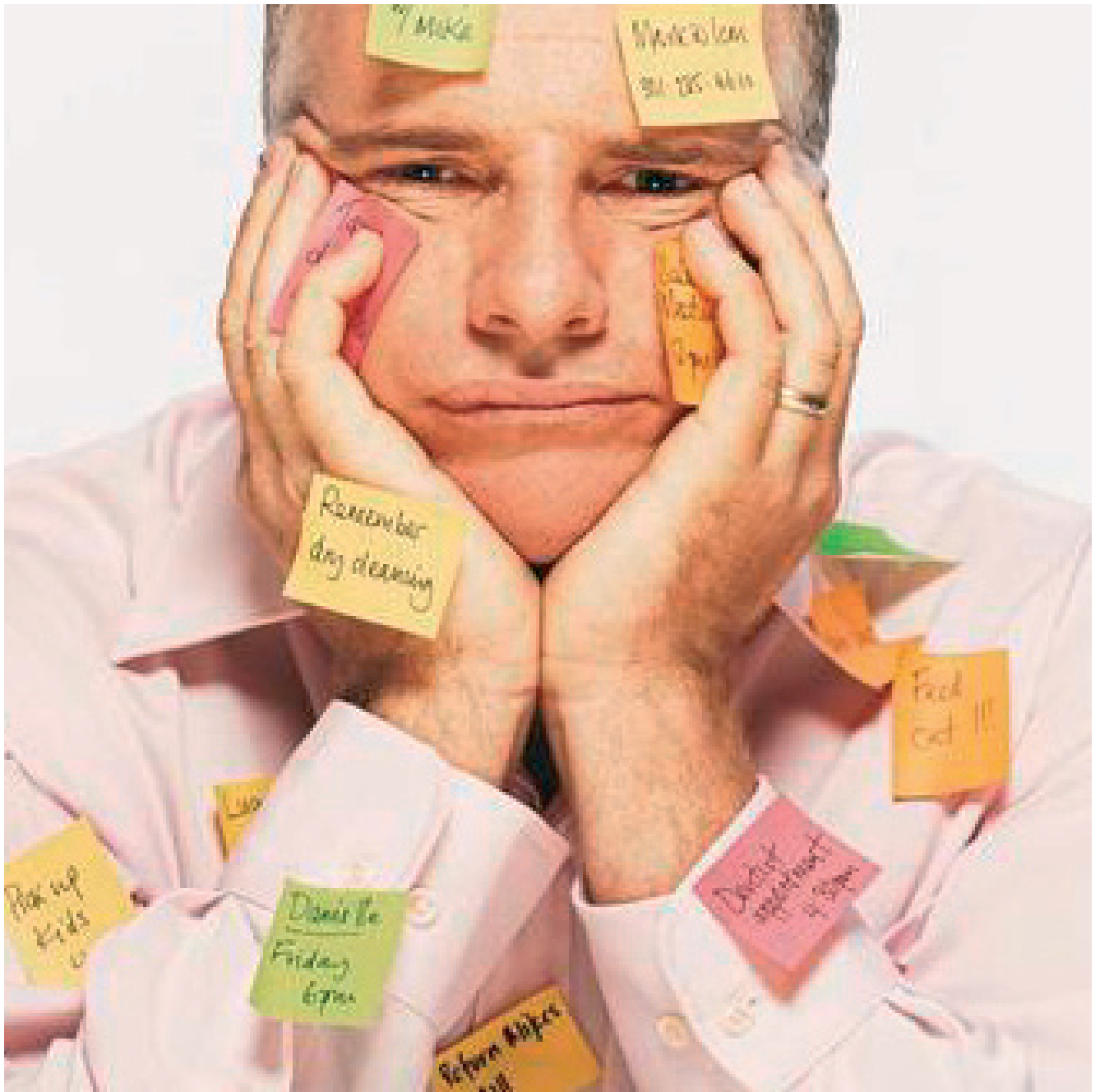
6 Users

6.3 Conclusion

The future look and feel of the manuals should be in sync with the needs of the various users. Hereby there are recommendations for the future look and feel, so that all the different kinds of users can use the manual properly.

Different people, different needs.

Almost every user has different needs from one of more manuals. There's for example a huge difference between external and internal users. Most external users will use it on temporary basis, but internal users should ideally use it every workweek. All those differences ask a lot from the new look and feel. Flexibility is one of the most important characteristics the new look and feel should have. The new look and feel should be as flexible as possible to give all the users the information they need and no more than that. The MUMPUP usermapping system in combination with the understand/use/create division should be an realistic framework to canalise and organise all different needs from the different users.



List of Demands

7

7 List of Demands

The previous chapters dealt with the current manuals, the future users and the available media. There have been a lot of statements made in the different chapters. All these statements together formulate a list of demands that need to be fulfilled in the new system.

Product:

- An online application for communicating various manual information to various (internal and external) users.

System:

- The online application needs to be build in the content management system PublishHQ.

Outward appearance:

- The Graphical lay-out of the system needs to be in sync with the EBL graphic design from EDEN.
- The Writing style/ tone of voice in the system needs to be in sync with the EBL copy manual from Kapler Communications.
- All information needs to be available in US English. (Secondary optional languages possible)⁶

Structure/Content:

- The division between understand/use/create needs to be implemented in the system.
- All information sorts (pictures, text, 3d models) need to fit within the digital environment.
- There must be user-centered taskbased and userfriendly interface to present the manual information in all manuals.
- There have to be inter-manuals relations within the system. (horizontal navigation)

User management:

- There has to be a division between a public part and a 'manual part' within the system.
- There has to be a workflow management system.
 - Each user of the system needs to have a Personal User Profile
 - Each manual within the system needs to have a Manual User Map
- There has to be a version control system.
- Each manual should have a Manual Task Force with edit rights

⁶ All information needs to be available in US English. If localisation is needed for different local design standards or local users, this can be done. The system should have a localisation option for the parts that need that. The language can be different in this local sections. Only localize when needed.



Concepts

8

8 Concepts

After the formulation of the list of demands, the creative part of this assignment starts. All the demands formulated need to be fulfilled. Most demands are about structure and the underlying system. But of course there must be an outward appearance for the system. The 'look' of the new system is investigated with the help of concepts. These concepts were merely a investigation about the basic form in which all the information in the system will be presented. After the generation of these concepts there is a moment of choice. A concept (or two) will be chosen to be fully worked out.

8.1.1 Web Copycat

Web Copycat⁷ is the most safe and, quite honest, unoriginal of the three concepts.

The concept is founded on the current webpage lay-out of PANalytical. Elements like the login and the search are on exactly the same place as the current website. Only difference are the EBL colors and the content of site. The homepage starts with a choice between understand, use &



Figure 8.1.1.1 Original site vs. Web Copycat

create. After one of these area's is selected, the nine aspects like graphic, copy & product will show up. So the user automatically comes into the understand/use/create part of a certain manual. When a user has no access to a certain part, the system will tell the user that he/she has no access to that part.

The lay-out consists of three columns.

Primary navigation: <ul style="list-style-type: none">- table of contents- login	Content <ul style="list-style-type: none">- some navigational choices	Secondary navigation: <ul style="list-style-type: none">- related links
--	--	--

⁷ A simulation of this concept can be found on the PANpoint CDROM under the name WebCopycat.ppt

The middle column is the most important column with all of the important content. The left and right columns have a navigational function. The left column has a sort of table of contents, which gives the user the possible to surf linear through the information. The right column has a much more non-linear navigational structure. In this right column all kinds of related links can be placed.

Pro's:

- This concept fits right in the current website structure. Users already know the structure of the current website, so they are reasonably quick familiar with the new system.
- Because of the same structure and lay-out, it could be easily be implemented in the current PHQ content management system.

Con's:

- Is a corporate website the same thing as an online manual application? No, it isn't. The question is of this structure and navigation is ideal for an online manual application.
- Style-elements in the current website like horizontal lines and green colors do not fall within the Graphical EBL style designed by Eden.
- Does the user understand the understand/use/create division on the homepage?

8.1.2 Choices

Choices is all about the user. It has the same three column structure as web copycat, but the middle part is different. The middle part is more a guide for the user. It serves certain choices to the user. These choices lead the user to the right information. The user is addressed directly and personally in the choices. A sentence like 'I want to...' comes back frequently in this concept. The difference between the understand/use/create parts is much less visible in this concept.

An other change in this concept is the left column. There is no more table of content over here. The user is directed to the right info by choices, and not by some random searching in a table of contents.

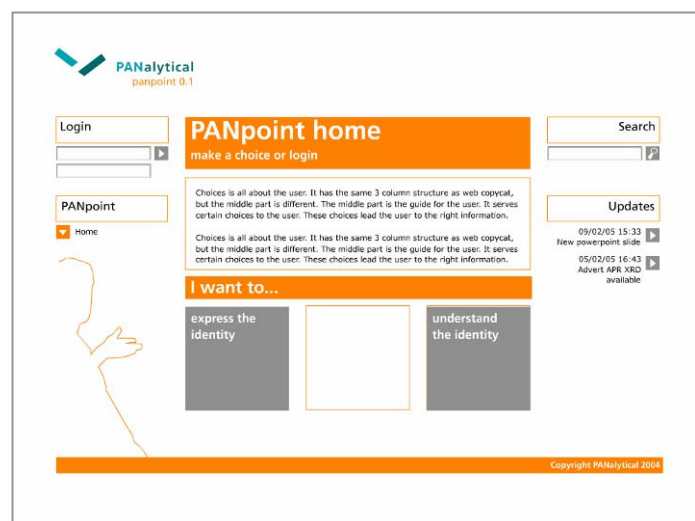


Figure 8.1.2 Concept Choices

Pro's:

- A more user-friendly task based interface, compatible with most manuals.

Con's:

- Will users really like a choicebased 'wizard' navigation? Sometimes they just want to search manually.

8.1.3 Icon

Concept Icon is the 'wildest' concept of all three. The focus of Icon lays on the EBL lay-out. It lets the current website lay-out loose. So no more three columns for navigational proposals. The only lay-out guideline is the Eden graphic EBL manual and its grid structure. The graphic EBL element of orange outlines shines through in this concept. The different area's like graphic and copy are visualised with outline icons.

Pro's:

- Stays 'true' to the graphic EBL manual
- Design freedom

Con's:

- Compatibility with PHQ content management system.
- No clear navigational structure
- Looks nice, but no real functional structure



Figure 8.1.3 Concept Icon

8.1.4 Concept choice

A combination of concept 1 and 2 with a dash of concept 3 together forms the starting point for the development of the online application. Below there are the start values from the different concepts that together define the starting point for the development of the online application.

Starting-point:

- Three column structure from current website (concept 1 and 2)
 - The three column structure has proven it's usability and user friendliness in the current PANalytical corporate website.
 - People already know the three column structure of PANalytical corporate website
 - Easy implementation
- Choices (concept 2)
 - In the content column to user will get choices to navigate to a certain part of the online application. Don't use the understand/use/create framework as navigational method.
- Left Column choice navigation (concept 2)
 - A intelligent navigational tool for navigation through the manuals
- Small use of iconography (concept 3)



PANpoint

9

9 PANpoint

9.1 Introduction

The mix of the two concepts, Web Copycat & Choices was the starting point of a development process. An insight in this development process and certain choices made in it will be given in paragraph 11.2. After a lot of versions and a lot more changes there is one final version. It goes by the name of PANpoint. The point were everything that defines PANalytical comes together.



In this chapter a full description of the PANpoint system in all her aspects. First the underlying structure of the PANpoint system is described. This structure is the fundament of the whole PANpoint system. After that the user-interface and the graphical design are explained. "How is the underlying structure presented to the user?" is a core question in these two paragraphs. Finally there is a special focus on the navigation within the product manual.

9 PANpoint

9.2 Structure and Navigation

In this paragraph the whole structure and way of thinking behind the PANpoint system are described. This 'invisible' structure is maybe the most important aspect of the PANpoint system, and this structure was developed independently from the graphical concepts as seen in chapter 8. Where does one start en how does a random user comes to the information he/she needs? That's the central question in this section.

One thought was very important when creating the structure of information in the PANpoint system. The needs of a random user is the most important factor when designing this structure. The structure must be clear and intuitive.

To explain a structure of a system in words is a complicated matter. Therefore there is a visual system map attached to this report. (attachment A3) In this system map the whole PANpoint structure is visualised.

9.2.1 The system

It's time to go back to the EBL project as a whole. Figure 9.2.1.1 shows in the EBL project in one view . There is one corporate EBL that overlooks all nine different aspects that all have an own manual.



Figure 9.2.1.1 EBL project

This division between the corporate EBL and the nine aspects is the first choice a user will be given. The rest of the structure of PANpoint is formulated with the help of the understand/use/create division and the MUMPUP usermap-system. In figure 9.2.1.2. the basic PANpoint structure.

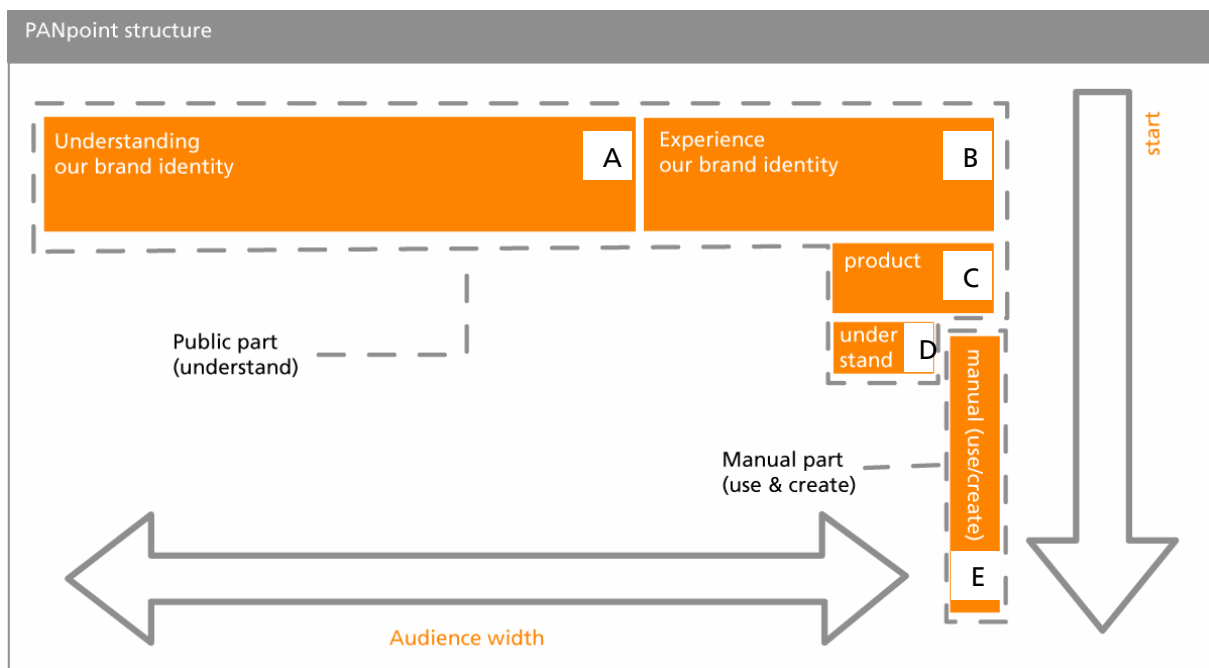


Figure 9.2.1.2 Basic PANpoint structure



The first choice for the user is the following one:

- Understand our brand identity (Corporate EBL) (A)
This part contains all information about the Corporate EBL. The corporate strategy, the main identifiers, etc. The word 'understand' gives away the audience of this part. This part falls under the understand content and can be accessed by everyone who has an interest to read it.
- Experience/express our brand identity (B)
This part contains all the nine aspects that all are expressing the corporate identity. Every aspects in split apart in a understand part and a manual part. The manual part consists of the use and create part. The understand part has a large audience. The manual part is for specific, mostly internal, audiences and can only be accessed by registered users.

After the first choice has been made the user finds him/herself in A or in B. When the user is in A (Understand our brand identity) the user can make a choice between various topics as 'corporate strategy' or 'main identifiers'. All topics go about the basic EBL corporate identity.

When the user is in B (Experience/express our brand identity), the user can make a choice between the nine well known different aspects/manuals. When the user makes a choice for an aspect he/she finds himself in the area meant for the aspect in question. (for example: Product) (C)

When the user is in C (the aspect in question) there is a choice between a understand part and the 'manual part'. The manual part (use & create) is only accessible when you are logged in and your Personal User Profile (PUP) says you have access to that specific manual. So if you want to enter a 'manual part' you have to login first. A login option is therefore required. If the user is not logged-in he/she will not even see the option to go to the manual part.

The understand part for the aspect in question (D) contains general information intended for a large audience. The manual part (use & create) (E) is for a specific audience that really needs information about the aspect in question for practical use. The structure of each manual part is different for each manual. More information about the structure of each manual part in the next paragraph.

The general thought behind this general PANpoint structure is to filter the audience for the information as quickly as possible.

9.2.2 The manual (use & create) part

Once the user has entered the manual (use & create) part, it means that the user actually is searching for information or templates to use or create the aspect in question. The Personal User Profile describes if the user has access and what the user can and cannot see in the manual part. All information in the manual part is structured in a content based way in different manual articles. The user can only access the articles that are described in his/her PUP. From the point that a user enters a manual part for one of the nine aspects, there is a large difference in manual content.

A important question in the project was: "Can there be an uniform navigational method for all information in the nine manual parts?" The answer is no. Figure 9.2.2.1 tries to explain this.

The figure shows the differences between the product and copy manual. And there quite a few.

First of all, copy is a 2d matter and product a 3d matter. This is the first fundamental difference. Also the copy manual from Kapler has more points of view: "Who is going to read it?", "What are your writing?". The product manual has just one point of view: "What part of the product are you working on?".

These differences are large, so an uniform navigation method for these will not be user-friendly. The product manual will be forced in a copy structure, or vice versa.

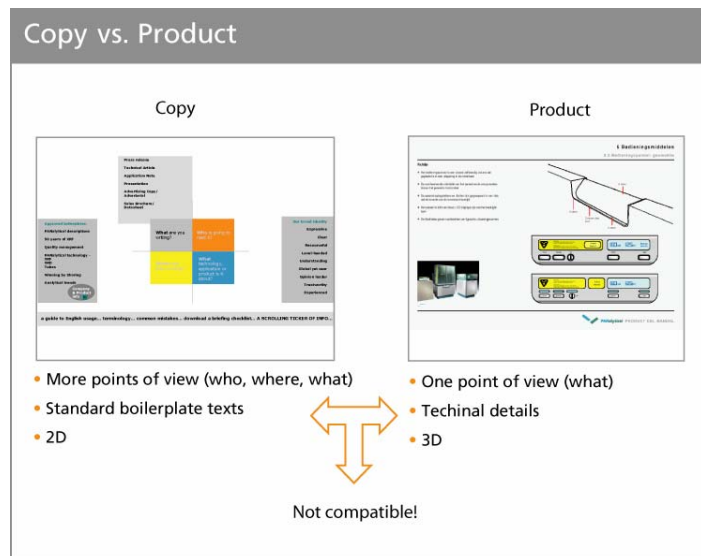


Figure 9.2.2.1 Copy vs. Product

There can't be the same navigational structure for the copy and the product manual. This theory also holds up for different manuals. There are just too much difference between the manuals for an uniform navigational structure for all manuals.

This differences ask for a different navigational approach for each manual. Each aspect (graphic, copy, imagery etc.) asks for its own navigational methods within the manual part. This is called the 'User-centered Navigational Structure' (UNS). Each manual has his own designed UNS because of the target of maximum usability. So the navigational structure can be different for each manual. The choice for a special UNS for each manual is made, because the great difference in manual content. The user friendliness is the biggest demand, and therefore each manual get its own UNS. Each UNS should be developed together with future frequent users of the manual. In fact this is done as an example for the product manual in this project. After the users of the manual were formulated in the Manual User Map, together with these people the ideal navigation for the product manual is investigated. This method of developing the UNS together with the future users of the manual is strongly advised.

Some elements from the product manual UNS will possibly fit in all UNS for all the manuals. This will become the 'fixed elements' that can come back in each UNS. More about these possible fixed elements in 9.4 UNS Other Manuals.

9 PANpoint

9.3 UNS Product Manual

As stated in the previous paragraphs, every manual part will get its own User-centered Navigational Structure. The development of these User-centered Navigational Structures should be a process in which the future users of the manual parts are actively involved in. The needs of these future users should be considered when developing the User-centered Navigational Structures. The User-centered Navigational Structure should be something that gives the online manual an advantage compared to a paper one. It should be intuitive for the user to find the information he/she needs.

This paragraph gives an insight in the development of a possible UNS for the product manual. This navigational structure is developed with the cooperation of the future manual users named in the Manual User Map. This is not the definitive task based guide for the product manual, but merely a first version. The definitive UNS should be confirmed in a next phase of the development of the PANpoint system.

9.3.1 Current Manual

The current Product Manual designed by Van Berlo has a content based structure. It's just a linear flat paper with a table of contents of about 40 pages. (see 4.2.5) The information in this manual needs to be presented to the user in a User-centered Navigational Structure. The primary question when designing a User-centered Navigational Structure is the following one: 'For what task is the user consulting the manual?'

To develop the User-centered Navigational Structure for the product manual, there was first made an inquiry of possible navigational possibilities within the manual.

The manual from Van Berlo is a straight document that holds information about the general design guidelines but also about specific elements of a product. There were found four navigational methods for creating a user centered navigation for an online product manual. These four basic navigational methods were found in collaboration with people from PARK design management.

Algemeen	3 Oppervlakken
0.1 De Product EBL Manual	3.1 Kleurschema
0.2 Bereik en gebruik	3.2 Hoeken en randen
0.3 Relatie tot de Expressive Brand Language	3.3 Contactvlakken tussen vlakken
0.4 Conceptontwikkeling	3.4 Zichtbare verbindingsmiddelen
0.5 Concept A2	
1 Vormgeving van de console	4 Fysieke user interface
1.1 Hoofdvolumes	4.1 Grepen van samplehouders
1.2 Verhoudingen	4.2 Grepen van transparante kappen
1.3 Basisvorm en varianten	4.3 Grepen van isolatiedeuren
1.4 Desktop apparatuur	
1.5 Positie bedieningsconsole	5 Bedieningsmiddelen
2 Vormdetaillering	5.1 Bedieningspaneel: structuur
2.1 Contact met grondvlak	5.2 Bedieningspaneel: geometrie
2.2 Details van het werkvlak	
2.3 Luchtopeningen en roosters	6 Product graphics
2.4 Aansluitingen	6.1 Beeldmerk Panalytical
2.5 Toegang tot de laadopening	6.2 Typenaam

Figure 9.3.1.1 Contentbased current manual

9.3.2 Navigational Methods Product Manual

Two navigational methods found for the product manual are User-centered. These are 'Tasks' and 'Visual'. The other two methods are more standard methods known from a lot of digital application, namely 'Index' and 'Search'.

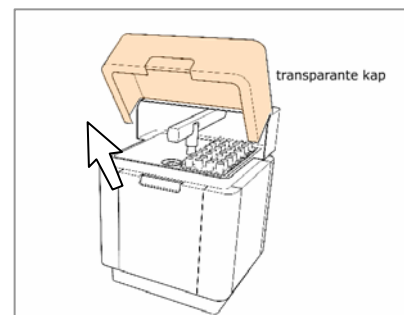
Tasks

A textbased navigation, in which the user gets the right information by making textual choices. The choices are divided by likely tasks the user is busy with.



Visual

Visual navigation method. The user sees a virtual model of a product of PANalytical. The user can visually click of different parts to get the right information. This visual model can be two dimensional or three dimensional.



Index

The user searches in an alphabetic index or table of contents to find the right information. This navigational method is very close to the original linear paper version from Van Berlo.

19" Racks
Aansluitingen
Basisvorm en varianten
Bedieningspaneel
Contact grondvlak
Contactvlakken tussen vlakken
Details werkvlak
Desktopapparatuur
Graphics
Hoeken en Randen
Hoofdvolumes
Isolatiedeuren
Kleurschema
Luchtopeningen roosters
Toegang tot de laadopening
Transparante Kap
Vorm
Grep
Verhoudingen
Verpakkingen
X-ray indicatie
Zichtbare Mechanische componenten

Search

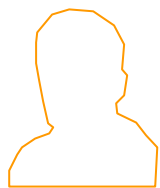
This navigational method is very known from the internet from searchengines like google or altavista. The users enters a couple of keywords, and there is an automatic search to relevant articles.

A diagram of a search interface. It features a text input field containing the text 'transparante kap'. Above the field is a mouse cursor icon. Below the field is an orange button with the text 'zoek'.

9.3.3 User Test/Questionnaire

9.3.3.1 Testpanel

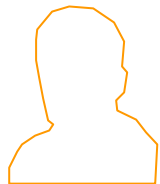
This four navigational methods were tested in a small user test with the future most frequent users of the product manual. According to the Manual User Map, it are employees from the development department located at SC Almelo. Eugene Reuvekamp, general development manager, has suggested a group of five people that are going to use the product manual extensively. These five people were invited for the test and a discussion. Because Marketing Services employees also have access to the complete manual, one possible frequent user from this department was also invited for the test.



**Machanical Main
Constructor**
Development
SC Almelo



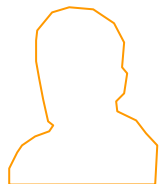
**Development
Manager XRF**
Development
SC Almelo



**Groupleader/
Department spec.**
Development
SC Almelo



Projectleader XRD
Development
SC Almelo



**Groupleader/
Department spec.**
Development
SC Almelo



**Content Manager
Internet**
Marketing Services
SC Almelo

9.3.3.2 The test

The test panel tested the four navigational methods in a digital flash simulation.⁸ The test persons needed to find the right information (the thickness of a transparent cover) with the four different navigational methods. The four navigational methods were afterwards rated in a questionnaire. Each navigational method was rated on user friendliness, quickness, clearness, simplicity and familiarity. The test of the four different basic navigational methods was a starting-point for a discussion with these future users about the ideal navigational method within the product manual.



Figure 9.3.3.2.1 Userstest Product Manual

⁸ This digital usertest is present on the PANpoint cdrom with the filename: 'productusertest.swf'

9.3.3.3 Results and conclusions

Every navigational method is rated along a set of five characteristics. The test persons did assign grades for each characteristic. These grades went from 1 to 10. In table 9.3.3.3.1 there are the averages for each characteristic.

	Tasks	Visual	Index	Search
User friendliness	7	9,8	6,3	6,5
Quickness	6,8	9,8	6	7,5
Clearness	6,8	9	6,3	7,3
Simplicity	6,5	9,3	6	7,3
Familiarity	6,5	8	9	9,3

Table 9.3.3.3.1 Averages

Tasks remarks:

"I expect translation problems"

"There are numerous ways to name the transparent cover, how do I know the right term?"

"By complex parts, to many textual choices -> becomes unclear"

Visual remarks:

"Maybe a visual navigation becomes to 'heavy' for a website?"

"Perfect! We think visual!"

"A picture says more than thousand words."

Index remarks:

"When you don't know the designation for different parts, you are in trouble"

"You have to search in an index, what IS the difference with a paper version?!"

Search remarks:

"When you don't know the designation for different parts, you are in trouble"

"Familiar method!"

The 'Tasks' method was not very preferred by the test panel. A common opinion was that you cannot predict all tasks the users will need the product manual for. Besides that there are a lot of language problems. Does the user know the textual slogans used for a certain part?

The 'Visual' navigational method was preferred by all development employees for the primary navigation in the product manual. The power of the visual method is that sloganizing is avoided. When you work with 'tasks', 'index' or 'search' you come to the problem that some people don't know the exact description for a certain part of a product. If they want information about the transparent cover, they can search for 'see-through cap' and then find nothing! With the visual method this 'ambiguity-problem' can be avoided, because visually there are no ambiguity. A extra plus from the visual method is that used slogans are learned automatically when navigating with the visual system. The only point were the visual method scores badly is familiarity. Methods like search and index are used often in a web based environment and are very familiar. This was the greatest strong point of these two more traditional navigational methods.

The visual method is not a familiar navigation method on the web. An often made suggestion in the usertest and discussion was a combination between the visual system together with a search or index function. If you don't really know the slogans in the product manual, you can use the visual system. But if you are used to the slogans (that you have learned from the visual navigation) and you have to get information quickly, you can use the search or index function.

9.3.4 Proposal UNS Product Manual

This is the final proposal for the User Centered Navigational Structure in the product manual. This proposal is realised in collaboration with the future users of the product manual.

The User-centered Navigational Structure for the product manual will consist of two navigational methods. A visual guide and a Search/Index function. The visual guide is the primary navigational method and the Search/Index function the secondary navigational method.

9.3.4.1 Visual guide (primary)

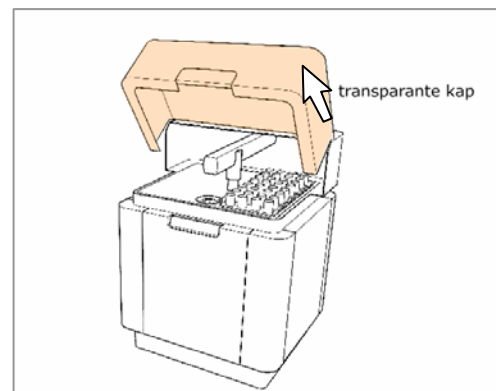
In this visual guide the user will find the manual guidelines by visually clicking on different parts of a product model.

Pro's:

- Avoid sloganizing/language problems
- Developers think visually
- Possible integration with .jt project⁹ development department

The development of this Visual guide is definitely not a picknick. There are still a lot of questions about this visual navigational method that need to be answered. To name a few:

- Is every guideline formulated in the product manual findable with this visual method?
- Do you eventual switch to 'text-only' or do you display every guideline within the visual model?
- Is a 2D model sufficiently, or is a 3d model needed?
- How do you navigate within the visual model? Mouse? Keyboard? Buttons?
- Can a webbased application handle a 'heavy' navigational method like the visual method?
- How much does an cutting edge visual navigation method cost?
- An important bottleneck can be the division between USE & CREATE content within a visual navigation method. How can this be solved?



9.3.4.2 Search/index function (secondary)

This function is used for quickly find the right information if the user knows the designation from a certain part.

A combination of a search and a index together will solve both their negative points. The search will work as an filter option on an index. This combination is often seen in the help option of familiar Windows applications like MS Word or Adobe Photoshop. This combination reduces the sloganizing issue. The user can directly see if his search term is in the manual index.

search <input type="text"/>	search <input type="text"/>
19' Racks Aansluitingen Basisvorm en varianten Bedieningspaneel Contact grondvlak Contactvlakken tussen vlakken Details werkvlak Desktoapparatuur Graphics Hoeken en Randen Hoofdvolumes Isolatieuren Kleurschema Luchtopeningen roosters Toegang tot de laadopening Transparante Kap Verhoudingen Verpakkingen X-ray indicatie Zichtbare Mechanische componenten Zichtbare verbindingsmiddelen	Verhoudingen Verpakkingen

⁹ .jt project: The development department is working on a webbased 3d tool to view 3D parts of a PANalytical product.

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9.4 UNS Other Manuals

Now there is a proposal for the User-centered Navigational Structure for the product manual. This proposal is realised in collaboration with the manual future users.

The development of the UNS for all manual parts should go like the development of the UNS for the product manual. Together with the future users. In this paragraph there is a brief overview about the possibilities for the UNS of all other manuals.

9.4.1 Fixed division

The product manual UNS consists of the Visual Guide and the Search/Index function. This division between these two navigational methods can be extended in the UNS of the other manuals. Each manual will get a some sort of guide and a Search/index function. The guide is specially developed for each manual. This specially developed guide for each manual will get the name: "Task Based Guide". This is because this guide will be developed with the tasks of the user in mind. The Search/index function is a fixed element that is exactly the same for every manual. Figure 9.4.1.1. explains the fixed division in all the different UNS.

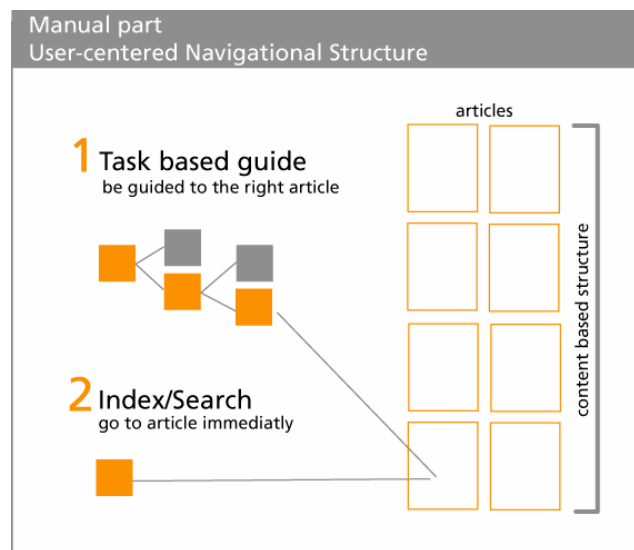


Figure 9.4.1.1 Fixed Elements UNS

- Task Based Guide (primary)
 - Specific for each manual
 - Learn
 - Kind of a tutorial
 - Be aware why you need the information
 - See relations between different area's
 - Innovative
- Search/Index (secondary)
 - The same for each manual
 - Quick
 - Simple
 - Familiar

9.4.2 Suggestions Task Based Guides

In table 9.4.2.1 there are short suggestions about possible Task Based Guides for the other manuals besides the product manual.

Manual	Task Based Guide
Graphic	Tasks. Textbased choices. Only tasks mentioned in the PUP are visible.
Copy	Task Based Guide designed by Kapler Communications. ¹⁰
Imagery	Tasks. Textbased choices. Only tasks mentioned in the PUP are visible.
Web	No current suggestion.
User-Interface	Visual.
Booth	Visual. Booth toolbox.
Facility-3D	Visual.
Behavior	No current suggestion.

Table 9.4.2.1 Suggestions TBG

UI, Booth & Facility/3d are all 3d matters. Maybe 3d visual navigation is the best way for navigate in these manuals.

¹⁰ . Divide the current TBG by Kapler into USE & CREATE. USE = Boilerplates. CREATE = Guidelines

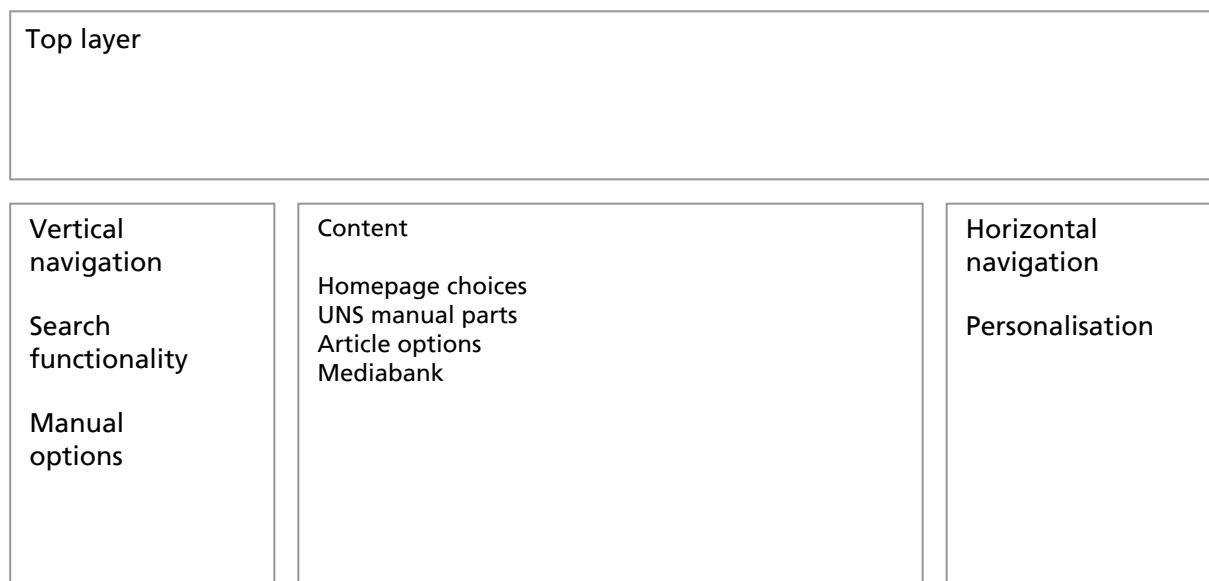
9 PANpoint

9.5 User Interface

How is the structure of the system presented to the user. When and where do you present the different kinds of information to the user? When do the different functionalities of the PANpoint system pop up? These questions are all answered by a user-interface design.

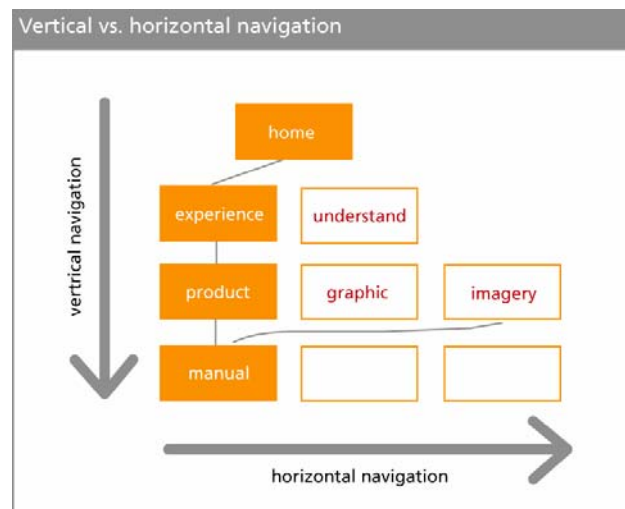
9.5.1 Basic structure

PANpoint always presents information to the user in a three column structure. Every column has his own functionality. Above the three columns there is always a top layer.



The left & right column both have a supportive navigational function. The middle column is the main content column, which provides the user the manual information and primary navigation choices. (such as the Task Based Guide in the manual part)

The left column is the stage for vertical navigation. Vertical navigation follows the structure of the PANpoint system. The right column is the place for horizontal navigation. Horizontal navigation is totally independent from the PANpoint structure and offers the user 'cross-links' to whole different area's in the PANpoint system.



The User Interface is dependable of the location where the user finds himself within the PANpoint system. An other factor that determines the user interface is whether a user is logged in or not. When a user has logged in in the PANpoint system, more options become available, all in the right navigational column. Therefore the right column is also the personal column.

9.5.2 Top layer

The top layer always stays the same, wherever the users finds him/herself.



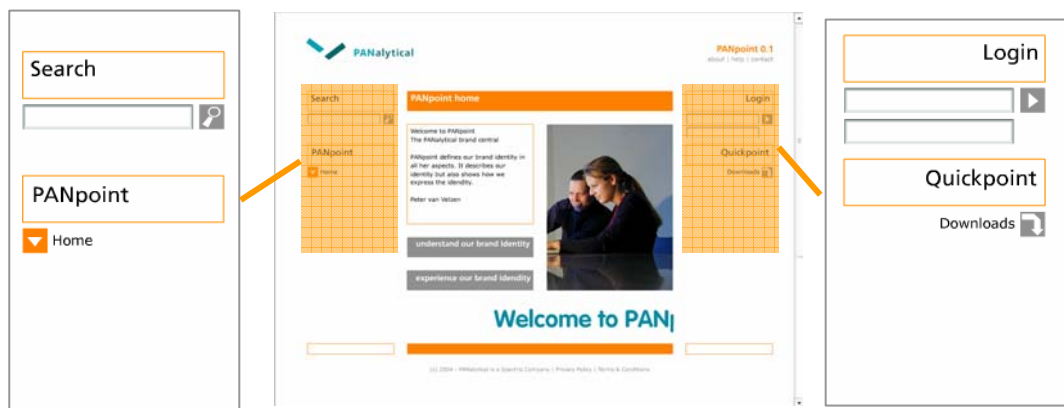
In the toplayer there is the PANalytical logo (clickable to go back to the PANalytical website) on the left. On the right there is the PANpoint logo with 3 links underneath:

About > Information about the PANpoint system
Help > Help about the whole PANpoint system
Contact > Contact data (system administrator)

9.5.3 Side columns

The location in the system (public or manual) and if the user is logged in or not together determine the look of the user interface. Therefore there are 3 statuses the UI can be in. They are described below. The left and right column change in the different statuses.

9.5.3.1 Public (understand) – Not Logged in



The system starts in this status.

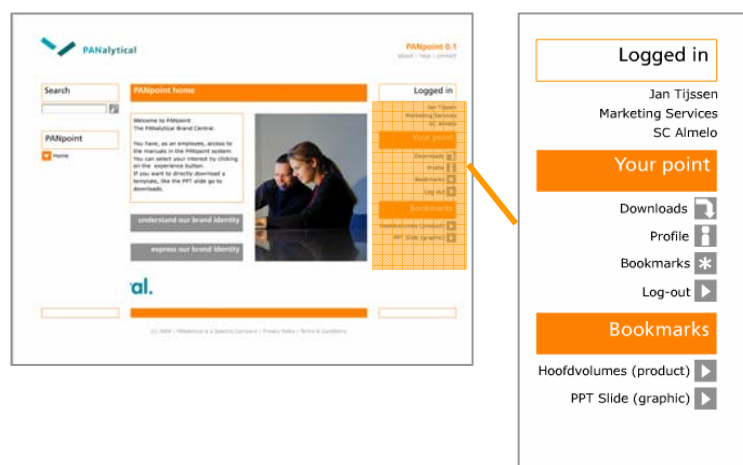
Left Column:

- Search function
Searches in both the public and manual part. If you don't have access so certain manuals or certain parts of manuals these search results will not show up. When in 'Not logged in' the search function will only search in the public part.
- PANpoint choicetrail
A special designed navigational tool for vertical navigation. When in the public part the choicetrail is in navigational mode. More information about choicetrail in 9.6.6.1 Choicetrail.

Right Column:

- Login function
Users can login with a username and a password. This is connected with the Personal User Profile system.
- Quickpoint
Horizontal navigation tool. Quickpoint is an assembly of quicklinks to frequent used functions in the PANpoint system. Only 'downloads' is available, when not logged in.
 - Downloads
A link to a central download section, where all public available downloads are summed up.

9.5.3.2 Public (understand) – Logged In



In this status only the right column has changed. Because the user is logged in now, the right column has become more personal.

- Your Point
Replacement for quickpoint with the same function. Horizontal navigation tool with an assembly of quicklinks to frequent used functions in the PANpoint system. Your point has more personal links.
 - Downloads
Link to the download section with all available downloads for all sections of PANpoint mentioned in the users PUP.
 - Profile
Link to the profile page for the user. On this profile page the user can see a summary of all manual (parts) he/she has access to. And on this profile page, the user can alter personal details, like the password.
 - Bookmarks
Link to the central bookmarks page, where all the bookmarks of the current user are summed up. A user can add every article within the PANpoint system to his/her bookmarks.
 - Log-out
By clicking on this link, the user will log-out from the PANpoint system, and the system return to unlogged status.

9.5.3.3 Manual (use & create) – Logged In



If the user navigates to the manual part the left and right column change again. The user can only access the manual parts that are described in his/her Personal User Profile. A login is necessary.

Left Column

- **Choicetrail**
The vertical navigation tool choicetrail does now enter choicemode. More information about the choicetrail and its modes in 9.6.6.1 Choicetrail.
- **Manual options**
Options for the current manual.
 - **Index**
Direct access to the manual index.
 - **Language**
Option to change the manual language (if possible)
 - **Tutorial**
Link to the manual tutorial that describes the operation of the Task based guide for that manual.

Right column

- **Related**
Instead of the most used bookmarks section, there is now room for related links. These horizontal links can connect different manuals to eachother. The related links only show up, if a user has access to that manual part according to his/her PUP.

9.5.3.4 Middle column

The middle column has a main function for displaying all the content of the PANpoint system. The middle content column serves also as a navigational guide, by serving the user choices where he/she wants to go. The middle column has also different statuses in which it can operate, but these three statuses are not specifically determined as the two side columns. There are numerous ways the middle column UI can be built up, because each manual has its own specific User-centered Navigational structure.

The only status with a specified UI is when the user has reached a manual article within the manual part.

Manual article

When the user has reached a manual article there are a couple of fixed UI elements.

- **Mediabank**
In the mediabank all non-text related items to a manual article are stored. This can be pictures, videos, files. If an item in the mediabank is downloadable, the item will also be in the central download section.



- **Article options**
Each manual article in the PANpoint system has four options.
 - **Feedback**
An option to write feedback about the current article to the manual owner. This feedback will be automatically sent to the manual owner by email.
 - **Print**
An option to create a printer friendly version of the current article.
 - **Save as PDF**
The current article and all the pictures attached will be saved as a PDF to the local disk.
 - **Add to bookmarks**
The current page will be saved as a bookmark, and will be retrievable in the central bookmarks section.

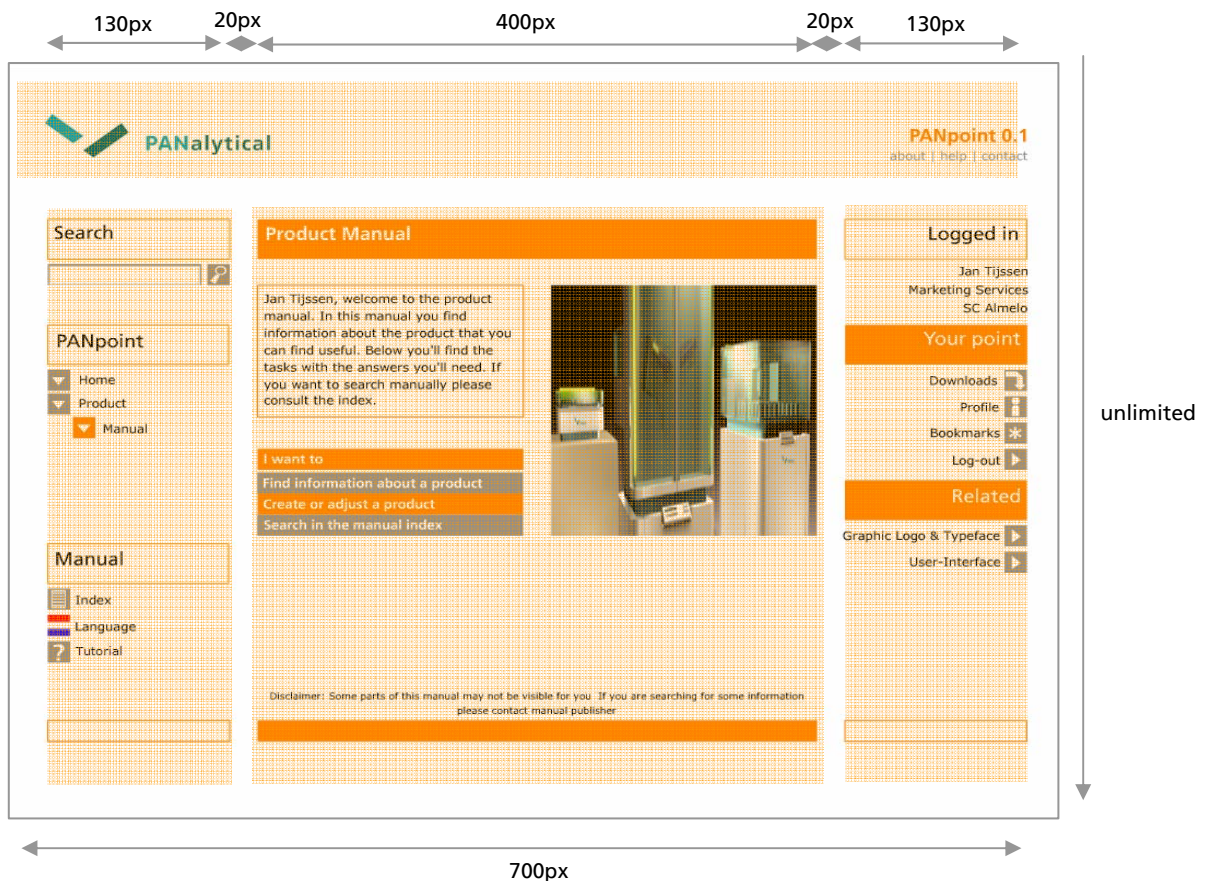


9 PANpoint

9.6 Graphical design

After a long process of changes and tweaks finally there is one graphical design concept for the online application. In this chapter a complete description of all graphical design aspects of the PANpoint system. The new EBL graphic manual by EDEN is the basis for the graphical design.

9.6.1 Basic Lay-out



There is a three column division that holds for **all** pages within the PANpoint system. This three column division is exactly the same as in the PANalytical corporate website. The dimensions are also exactly the same as the corporate website. There is no vertical boundary on PANpoint, the page is so long as the content need it to be.

All text in the left column is left aligned, and all text in the right column is right aligned. This is to give the system a feeling of symmetry.

Above the three columns there is a top layer that has a width of all three columns combine. In this top layer there is the PANalytical logo on the left and the PANpoint logo on the right.

9.6.2 Color Use

The two prominent colors, orange and grey, of the EBL graphic style are used mostly in the PANpoint design. They do have functional attributes in the PANpoint design.



ORANGE (PMS 138)

Primary color

Used in:

All active headings

Highlighted links

Special note: Filled headings have a more important function than the outlined headings. For example: The middle content column has always filled headings but the less important supportive navigational sides have outlined headings.



GREY (PMS 424)

Secondary color.

Used in:

All links (not highlighted)

Subheadings

9.6.3 Typography

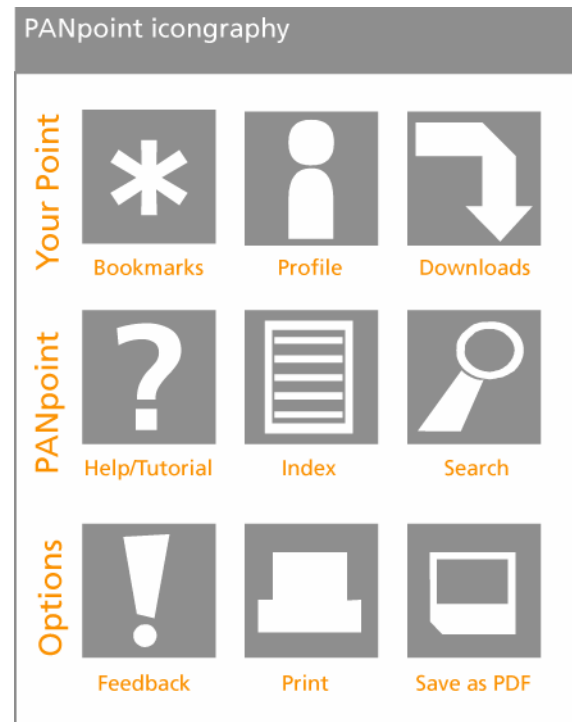
There are three typefaces used in the PANpoint system. They are discussed one by one.

- **Frutiger**
The 'standard' typeface from the graphic EBL housestyle.
Used in:
All headings
- **Verdana**
Typeface that is not present in the graphic EBL housestyle. Used for all the content text in PANpoint. Chosen because of the far superior electronic readability of the Verdana font. The Verdana font is developed for reading on a monitor and is a standard for electronic text. The readability is more important than the graphic EBL housestyle on this point.
Used in:
All content text.
- **VAG Rounded Bold**
The VAG Rounded font is only used on the home page in the scrolling marquee. It's only used there because of the poor electronic readability of this font.
Used in:
Homepage marquee

Frutiger
VAG ROUNDED Bold
Verdana

9.6.4 Iconography

Some links have a special icon to amplify the function of that link. The iconography contributes to the systems usability.



9.6.5 Imagery

The non functional imagery in the PANpoint system should be according the EBL imagery manual by EDEN.

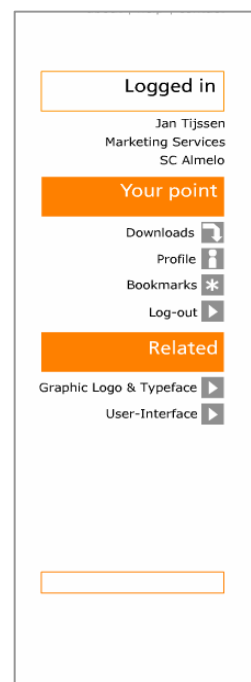
9.6.6 Left & Right Column

The left and right column have both a navigational function (see 9.3 PANpoint - User-interface). All hyperlinks in the left and right columns are indicated by a 16x16 grey square, that becomes orange when highlighted. The 16x16 squares are aligned to the far side of the screen. The squares can have a special icon in them to illustrate the function of it. (see 9.6.4 Iconography) If there is no special icon for the specific hyperlink, then there will be the 'standard' link icon.



The headings that divide the different links are 32x130 rectangle shapes in two versions. Orange filled with white text or orange outlined with black text. The choice for one of the versions is made on basis of importance for the user. The more important links are below the orange filled headings.

At the very end of the left and right column there is a 16x130 rectangle to signal the user that this is the end of the column/page. An other function of the last rectangle is to amplify the shape of the whole column.

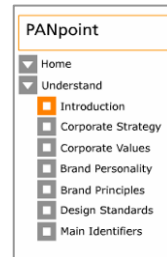


9.6.6.1 Choicetrail

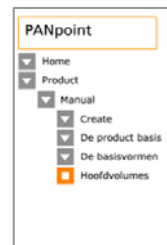
The left column is the home of the choicetrail. This special interface element has an important role in horizontal navigation through the PANpoint system. It also is a visualisation of different layers within the PANpoint system.

The choicetrail system has two operating modes.

- Navigation mode
Navigation mode is activated when a user is in the public 'understand' part of the PANpoint system. Then the choicetrail is basically a normal menu, with all links visible for the user.



- Choice mode
Choice mode is activated when a user is in the 'use/create' manual part of the PANpoint system. Now not all links are visible, the user sees only a trail of choices he/she made to come to the present point. Not everything needs to be shown in the choicetrail because the user is looking for specific information in the manual part of the system.



Elements

There are two link elements that form the choicetrail that refer to the content on the middle column of the page.

- Choicepoint
On the middle content page there is a option of choice to go further on a deeper level.
- End of the line
There is no option of choice on the middle content page to go further in a deeper level. You are on the end of the line.



The number of choicepoints is larger in choicemode. This is because a user makes more choices in the use/create manual part of the PANpoint. When you are in navigational mode the number of 'End of the lines' is larger. This happens in the understand part with the more common navigation.

9.6.7 Middle column

The middle 'content' column has no 100% exact design standards. Because the lay-out of the middle column is greatly influenced by the content of it. And the content does differ quite much in each different manual, because every manual has got it's own UNS.

There are a few design standard that hold up for every single page in PANpoint. There is always a 32x400 orange filled rectangle on top. In this rectangle there is the header of the current location of the site. A grey filled 16x400 subtitle is possible.

All the way down there is always a 16x400 orange filled rectangle to make clear that the page ends.

Between the top and bottom rectangles there is the 'real' content. For the positioning of this content there are a guidelines:

- Text is aligned left
- There are one or two columns of text/content
- Images are aligned right
- Keep enough whitespace (10px minimum) between each component



9.7 Operation

How will the PANpoint system function on a daily basis? Who is responsible for what when it comes to operating PANpoint in the PANalytical organisation? These questions ask for an operating plan.

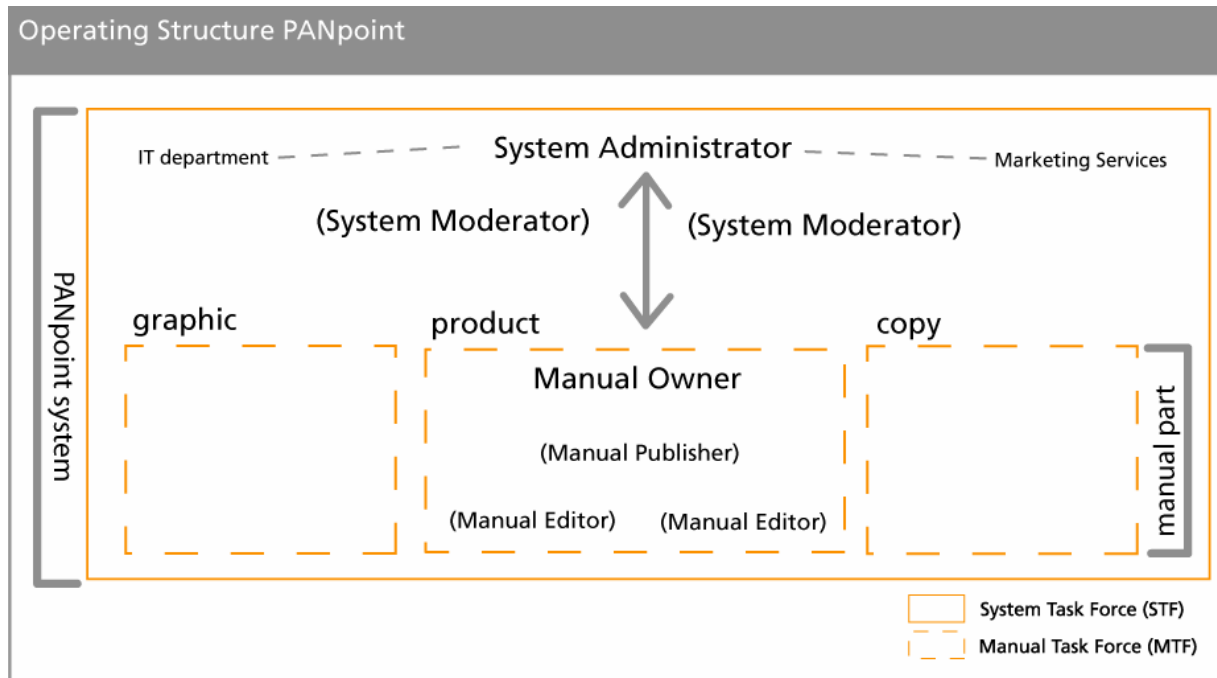


Figure 9.7.1. Operating structure PANpoint

In figure 9.7.1 there is a schematic overview of the basis operating structure. In this structure there are two kinds of taskforces. These taskforces are responsible for the functioning of the PANpoint system. The first taskforce is the System Task Force. (STF)

9.7.1 System Task Force (STF)

This taskforce is responsible for the functionality of the whole PANpoint system in the PANalytical organisation. The following people are part of this System Task Force.

- **System administrator.** The function of system administrator is absolutely necessary for a good functioning PANpoint system. The system administrator can access all areas of the PANpoint system and has edit-rights for every single page in the system. The system administrator overlooks and controls the total functioning of the PANpoint system in the organisation.
- **System moderator.** This is an optional role. Moderators can have control of certain areas in the PANpoint system, that do not fall within a manual part. Moderators support the administrator.

Departments that should at least have one person in the System Taskforce, are the IT department and the Marketing services department. The PANpoint system is a initiative from the Marketing services department. The technical realisation within the company will be supported by the IT department. Also external PHQ developer and supplier <theFactor.e> should possible get a position in the System Taskforce.

9.7.2 Manual Task Force (MTF)

The manual task force is already discussed in 6.2.1.3 User rights. This taskforce is responsible for the content in the nine different manual parts within the PANpoint system. So each manual part has his own task force for keeping the specific aspect up-to-date. A small recap:

- **Manual owner**
The ultimate 'boss' of the manual. He/she owns the whole manual and is responsible for the content in it.
- **Publisher**
The publisher is mandated by the owner, to publish the proposed changes made by the editor(s). The publisher role is optional.
- **Editor(s)**
The editor(s) will do the daily editing part of the manual to keep the manual up-to-date. All their changes need to be approved by the publisher or the owner.

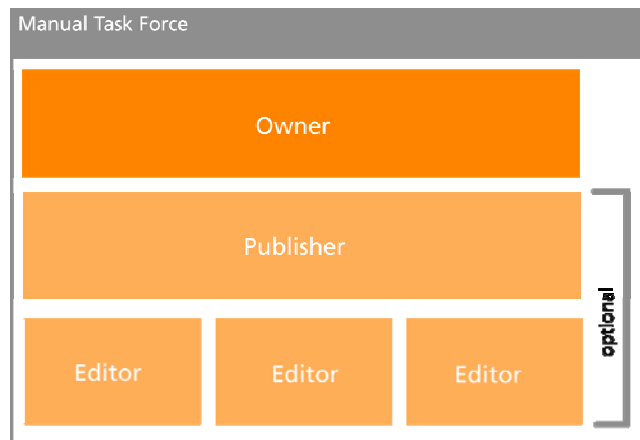


Figure 9.7.2.1 Manual Task Force

9.7.3 Procedures

The MTF & STF will both have standard procedures in which they will operate to keep the PANpoint system functioning well.

An important standard procedure will be for instance the editing of a manual part article. The schematic on the right gives a visual view on such a procedure.

There will be much more procedures in the functioning of the PANpoint system. These procedures should all be worked out in the next phase of the PANpoint development progress.

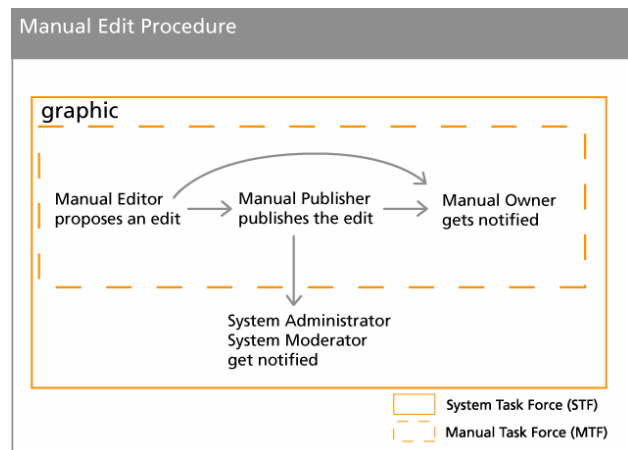


Figure 9.7.3.1 Manual Edit Procedure

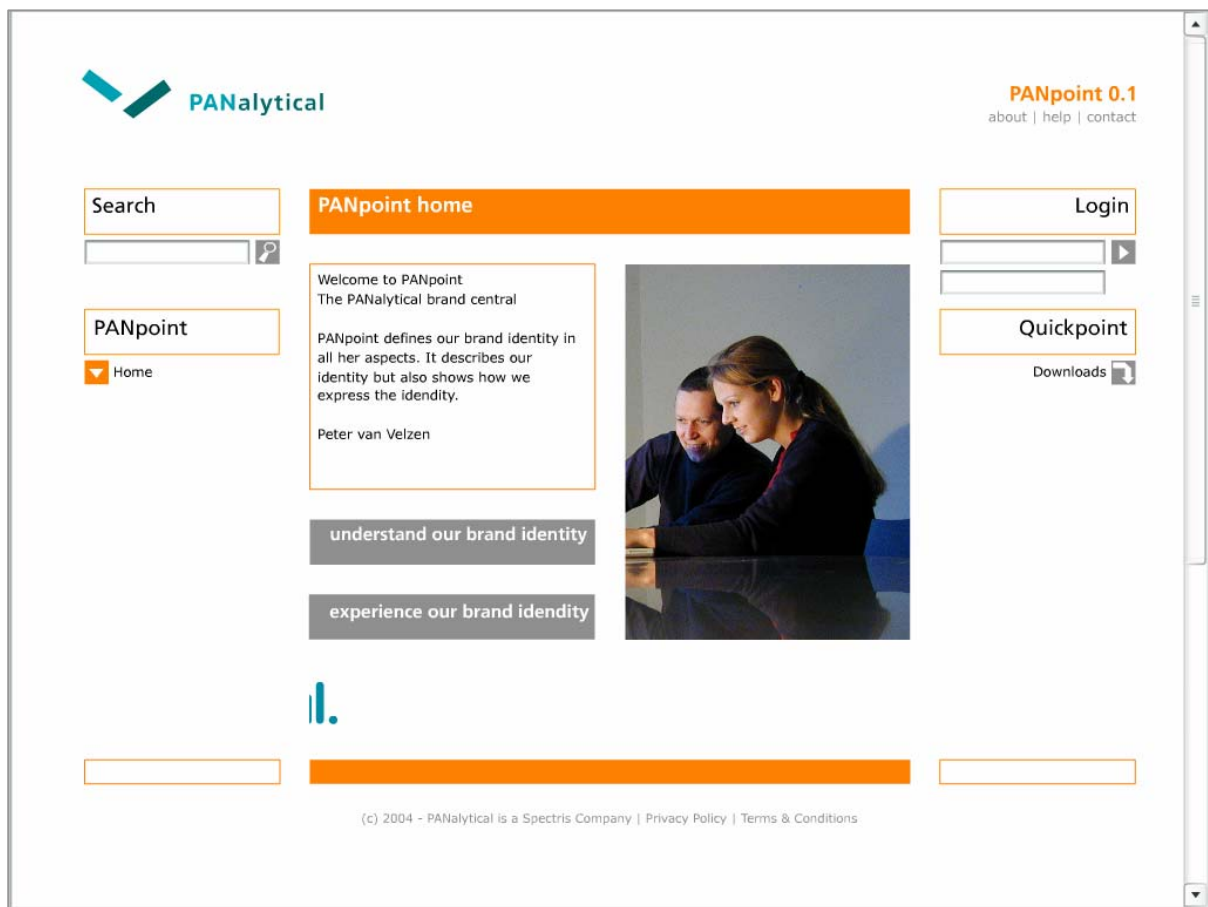
It's important that there are a few moments a year to evaluate the PANpoint system with all members of the manual task forces and the system task force.

9 PANpoint

9.8 Version 0.1

Version 0.1 is a simulation¹¹ of the PANpoint system made in Macromedia Flash MX. The function of this 'prototype' of the system is to give a true reflection of all statements made in the previous paragraphs. The basic structure, navigational elements and the graphical design are together expressed in this version 0.1.

The prototype has absolutely got no working content management system or workflow management system. The prototype only gives a glimpse in what the PANpoint could be like in the near future. What all will be needed for a fully functional version 1.0 in the PHQ content management system, will be discussed in the next chapter.



Version 0.1. simulation screenshot

¹¹ The PANpoint v0.1 simulation can be found on the PANpoint CDROM under the name PANpoint01.swf (flash movie)

9 PANpoint

9.9 Unique Selling Points

Why should PANalytical invest in this PANpoint system. What are the main advantages above traditional paper manuals? Now here they are, PANpoint unique selling points:

- Gives the user what he/she needs

The understand/use/create division in cooperation with the MUMPUP user mapping system makes it easy to fulfil the needs of all different internal and external users.

- Updated, flexible and lively

The corporate identity is an evolving matter. PANpoint has an workflow management structure to keep your design manuals up-to-date. Every user is actively involved in living the brand.

- Innovative user friendly tools

PANpoint supports specially designed navigation tools to present manual information as easy as possible to the manual users.

- Personalisation

PANpoint comes with personalised options to make it the perfect environment for each user individually.

- Distribution with a mouse click

With one click on a mouse PANpoint is distributed across the worldwide PANalytical organisation. PANpoint a great tool to guarantee brand uniformity worldwide.

- Measuring of effective use

With PANpoint you can measure how much the system is used and therefore measure how much the brand identity is used.



Prospect

10

10 Prospect

10.1 Resources

How to come from version 0.1 to a fully functional version 1.0 in the PHQ content management system? There is still a lot to do to come to a version 1.0, that is for sure. In this paragraph an estimate about the resources needed to come to a version 1.0. This version 1.0 can be implemented in the whole PANalytical organisation. The next step in the PANpoint development traject should be a feasibility study. In this feasibility study all possible obstacles in the PANpoint development process should be investigated. The possible costs, the technical boundaries of PHQ, the implementation in the organisation. Basically all information should be gathered that is needed to justify a start with the real development of the PANpoint system.

Project name: PANpoint feasibility study
 Duration: 5 months
 Taskforce: Two internship students (bachelor degree)
 <theFactor.e>, external PHQ developer & supplier
 Marketing Services Department, head Folke Meijer
 All manual taskforces

Deliverables: Technical structure PANpoint within the PHQ boundaries
 User-centered Navigational Structure for all manuals
 Resource analysis
 Projectplanning PANpoint 1.0

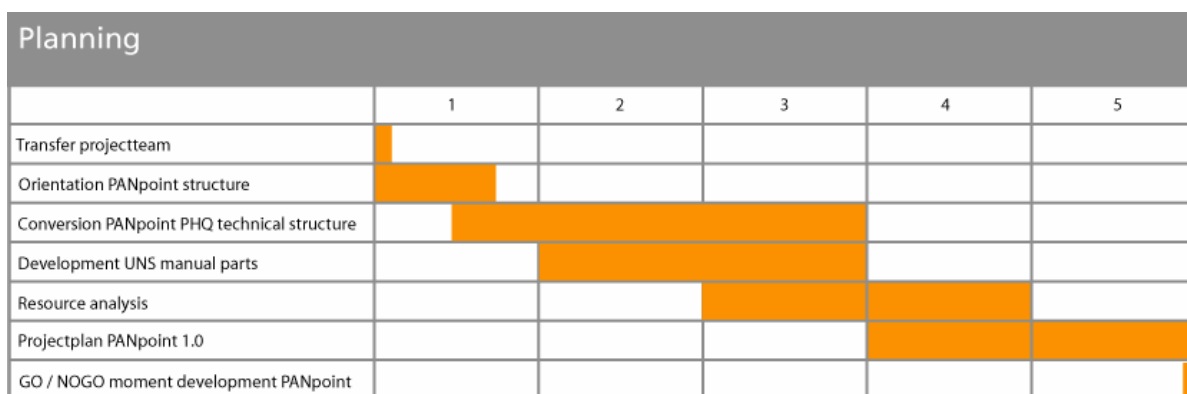


Figure 10.1.1 Planning Feasibility Study

The first part is about the full technical transition to the PHQ system. What changes are needed in the PANpoint system to fit within the PHQ content management system. This is the fundamental question in this part. Also the User-centered Navigational Structures for the nine manuals need to be developed in this part. The standard operating procedures also need to be worked out. All ideas from this project have to be made concrete for real implementation in the PHQ CMS system. After the complete technical structure is formulated, there has to be an analysis of the needed resources. How much does it cost? How many people will work on it? This strong valid questions need to be answered in this part. Part of this analysis will be negotiations with <theFactor.e>, the external PHQ developer and supplier. After this extensive analysis there must be an advise about how to develop and implement the PANpoint system within PANalytical. Maybe some elements from version 0.1 are not feasible and should be left out in version 1.0.

After this feasibility study there has to be made a decision about the real development and implementation of the PANpoint system. This should be an important milestone in the PANpoint development process. How long the real development and implementation of the PANpoint should take is a question for in the feasibility study. A nice target date for a fully functional PANpoint system version 1.0 is January 1th, 2006.

10 Prospect

10.2 PHQ adjustments

The structure and navigation of PANpoint is thought out with no technical boundaries. It is designed with usability and flexibility in mind. In the next phase there has to be a 'conversion' of the structure and interface to a real practical implementation in the PublishHQ content management system. The PHQ system of course has boundaries. Therefore there will be things that maybe will not fit within the boundaries of the PHQ system.

There has already been a first overview together with specialists from <theFactor.e> about certain adjustments to the PANpoint concept to fit in PHQ system. Conclusion was that PHQ can handle 95% of the demands of PANpoint. Of course there are still some points that need extra attention. The most important points in a short list:

- Usergroups

In the PHQ system user rights are granted by a user group system. The administrator can give different user groups access to certain areas of the site. So if there is a certain area, you can add user groups that do have access to that area. There is no possibility to create user layers in PHQ. A specific user has to be assigned to the group that have access to a certain part. The data must be converted to the PHQ user group system.

- Inline editing

PHQ has an inline editing function. This function will allow editors to edit information on the 'frontside' of the PANpoint system. Therefore they don't have to understand the underlying administrative backdoor of the PHQ system.

- Choicetrail

This navigational tool is not standard implemented in the PHQ system. Is this choicetrail tool feasible in PANpoint 1.0?

10 Prospect

10.3 Assuring sustainability

How to keep the PANpoint system alive after it's launch. There are a few important factors that will define the success of the PANpoint system in the course of time.

- Promotion

When the PANpoint system is launched there needs to be a campaign to promote the PANpoint system and it's advantages. There must be a clear message (preferably from Peter van Velzen, the big boss) to the employees that this system will aid them in their work at PANalytical. This promotional campaign is needed to counterattack some scepticism to new initiatives.

- Keep it updated

The PANpoint system is designed to be flexible. The Manual Task Forces need to use this flexibility to make changes in the manual content when needed. This to avoid that PANpoint becomes an antique relic in just a couple of months. The EBL brand identity evolves, and PANpoint can and must evolve with it.

- Clear organizational structure

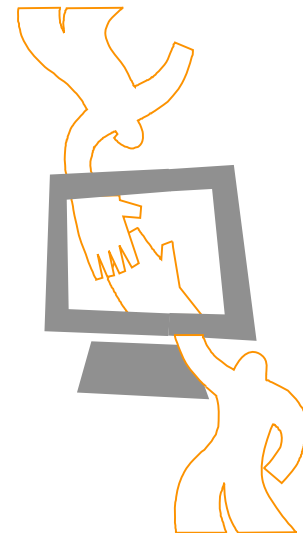
There must be a clear organizational structure about who is responsible for what content within the PANpoint system. An complete overview of system administrators, manual owners, manual publishers and manual editors. A moment two times a year to evaluate the PANpoint system with all members of the manual task forces and the system administrators should be there.

- PANpoint assistance

There has to be at least one contact person (the system administrator) within the company to assist users of the system when they need help.

- User satisfactory polls

Ask the user of the PANpoint system what they like about the system and what they don't like. Ask users of the system to contribute their idea's to new functionalities of the system. So the PANpoint system can change over time and evolve to an ultimate version 3.1.2.3. in 2020.





Reflection

11

11 Reflection

11.1 Objectives

A retrospective to the objectives that were formulated in the beginning of this project. Are they all fulfilled? The main research objective at the start of this project was the following one:

“The main objective of this research is the design of a unambiguous navigation and a ‘look and feel’ for all design manuals within the EBL project. The base for this design is an analysis of the needs of the future internal and external users.”

This objective was supported by these five main research questions.

- 1) What is the function of the nine manuals?
- 2) What are the differences and similarities between the current manuals?
- 3) What are the needs of the future internal/external users of the different manuals?
- 4) Which navigation and design is applicable on the manuals, so that the needs of the users are satisfied?
- 5) Is the new design for all manuals, applied to the product manual, satisfying the needs of the intern users within the Asterix¹² project.

These five research questions were all addressed in the course of the project and hopefully all explained in this report. There can be an argue about realisation of research question 3 and 5.

Question 3: What are the needs of the future internal/external users of the different manuals?

Not all needs of all future users of all the manuals are investigated and determined in this bachelorstudy. But there are so many different users in combination with the different manuals. This would be an investigation of a couple of years! You can’t just write the needs for each user down. Needs are flexible and difficult to describe. This bachelorstudy gives solutions (Understand/Use/Create in combination with MUMPUP) to fulfil the needs of the different users in a comprehensible manner.

Question 5: Is the new design for all manuals, applied to the product manual, satisfying the needs of the intern users within the Asterix project?

The original plan was to test a finished PANpoint 0.1 with a finished UNS for the product manual with users within the Asterix project. Instead of testing the final UNS there was a test of multiple navigational methods with the users. The final UNS was designed based on these test results. So the user test was pulled to a earlier stage in the development process. I think that this was the right way of action. Maybe the test with a final UNS for the product manual can be held in a later stage in the PANpoint development.

The other three questions are answered completely in my humble opinion in this bachelorstudy. The main objective is reached in the form of PANpoint v0.1 with the underlying structure and usermap system.

One of the deliverables was: ‘A navigational design that is applicable on every manual’ This deliverable is not 100% delivered. There is no uniform navigational design that is applicable on every manual. This is because each manual has his own UNS for realising maximum usability.

¹² AsteriX is the codename for the next generation XRD product family, developed in accordance with the guidelines from the EBL product manual.

11 Reflection

11.2 Milestones

In this section an elaboration about the most important milestones in the research progress. The most important milestones are listed here.

- Week 4 - Understand/Use/Create

The similarity in contenttypes that is present in all manuals that immediately makes an division in target audiences. This division in contenttypes is the true core of this bachelorstudy. It was a difficult task to find a true similarity between all the different manuals, and I think I found the right one needed for the new unambiguous navigation.

- Week 5 - The PUP follows the MUM

The completion of the MUM-PUP usermapping system was also a big milestone in the progress of this bachelorstudy. It was a real challenge to create a usermap system that encloses all different users and their needs. In combination with the understand/use/create structure, the MUM-PUP usermapping system gives an complete overview and control over all users and their needs.

- Week 7 – Understand/use/create

Again the division between Understand/Use/Create. This time it was the important decision to not present this division literary to the PANpoint user. This decision was made because the user probably won't directly comprehend the difference between understand,use and create. The division is still there, but the user will not navigate by the terms understand, use and create through the PANpoint system.

- Week 10 – User-centered Navigational Structure (UNS) for each manual

A decision made in the final stage of this bachelor study. Until this moment there was a constant search for an universal navigational structure that did hold up for each manual. This to create a maximum feeling of uniformity within the whole PANpoint system. The choice for a special navigational structure for each manual was made, because the enormous difference in manual content. You can't have the same navigational structure for the copy manual and the product manual. They just differ too much. The user friendliness is the biggest demand, and therefore each manual get its own User-centered Navigation Structure.

- Week 12 – Visual Task Based Guide (VTBG) product manual

The choice for a visual navigational structure for the product manual in collaboration with the future users of the manual was the final milestone in this bachelorstudy. The small usertest to come to this choice was a last-minute operation. Hopefully it did not effect the results and conclusions based on this inquiry.

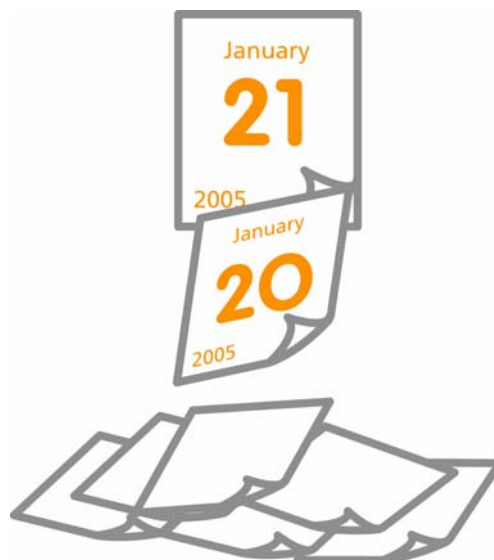
11 Reflection

11.3 Whole project

The planning of a three-month project in advance is a very difficult task. The real progress of the project turned out to be quite different compared to the original project planning.

The first three weeks went exactly following the original plan, but from week 4 everything got a little different. Truth is, when doing a project like this, a lot of tasks will develop parallel. Decisions you make in the design process will have an impact on the remaining project planning. Instead of stopping in week 9, I've continued to tweak and change the navigation concept for the PANpoint system until week 12. The development of the product manual part of PANpoint was therefore delayed and started in week 10.

The planning was made before I went to work at PANalytical. It is very hard to make an real concrete planning when you are not completely 'into' the assignment. When I really was working at PANalytical the assignment did immediately became more clear. There were also some extra demands from PANalytical that were not accounted in my original project planning. These extra demands resulted in chapter 10 'Prospect' of this report. A look ahead what is needed to really implement PANpoint in the PANalytical organisation. Such a prospect was needed because there is a follow up project. This is a feasibility study done by two students from the Saxion College Enschede. In the final stage there was a constant 'tension' between my own bachelor study objectives and the demands of PANalytical. Should I choose for the interest of PANalytical or for my own objectives from the project plan? I've tried to fulfil the demands of PANalytical but also my own objectives. The last weeks were therefore a little bit hectic, and time really flied by.



Time flied by.

Conclusions

I hope that this report gives a clear overview about the progress and results of my bachelorstudy at PANalytical. My time at PANalytical was a truly good experience. The assignment to design an online manual application was a great challenge that fitted perfectly within my personal interests. Therefore I have to thank Tonny Grimberg from the Industrial Design Centre for finding this assignment for me.

The 'nine till five life' was a experience I will not quickly forget. It was quite a change, after three years of a somewhat lazy life as a student. My three month stay at PANalytical did give me a nice sneak peak into the daily business process. It consists a lot of stress, that's for sure. I've learned practical business insights that I can never learn on the University.

There are still two small personal remarks that I want to make clear regarding the whole project.

- USE/CREATE is something completely different then READ/EDIT

USE/CREATE is a division in contenttypes. USE content is information that can be used instantly by a large group of people, such as the powerpoint slide. CREATE content is information intended for a small group. This small group of creators can make USE content with the CREATE guidelines.

READ/EDIT is a division in manual rights. Someone with the READ right can only read an manual article. Someone with the EDIT right can also edit the manual article. I confess that they are confusing terms, but I hope this is clear now once and for all.

- PANual?

I developed the system under the working title PANpoint. This name PANpoint always a temporary designation. The plan of calling the system PANual is something I personally don't prefer. It so much more than a just a manual, so each reference to the word 'manual' should be avoided.

Finally I hope that the feasibility study has as outcome that the PANpoint system is feasible within the PANalytical organisation. Then I will surely come back one day to see a fully working PANpoint 1.0 in action.

Jan Tijssen
February 25th 2005

Quotation of sources

Manuals:

- PANalytical EBL Product Manual, Van Berlo, Eindhoven, 2004
- PANalytical EBL Graphic Manual, EDEN, Amsterdam, 2004
- PANalytical EBL Imagery Manual, EDEN, Amsterdam, 2004
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- PANalytical EBL Web Manual, <theFactor.E>, Groningen, 2004

PANalytical docs:

- PANalytical organisation scheme, HRM department, May 2004

Internet:

- Amsterdam Stijlweb, www.stijlweb.amsterdam.nl, visited November 17th 2004
- AKZO Nobel, <http://www.akzonobel.com/company/identity/>, visited November 18th 2004
- DSM, http://www.dsm.com/en_US/html/identity/home.htm, visited November 18th 2004
- Huisstijl.pagina.nl, visited November 17th 2004

Attachments

- A1 Original Project Plan (Dutch)
- A2 Manual User Map Product
- A3 Systemmap PANpoint

More additional documentation is available on the PANpoint cd-rom.



Universiteit Twente
de ondernemende universiteit



PANalytical

Bacheloropdracht PANalytical Manuals

Plan van Aanpak

versie 1.1 6 oktober 2004

Jan Tijssen s0027790

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Actoranalyse

PANalytical is een fabrikant van analytische röntgen apparatuur en software. Het hoofdkantoor is gevestigd in Almelo. PANalytical is in 1948 officieel opgericht als onderdeel van het grote concern Philips. Vanaf 1895 was Philips echter al bezig met röntgen technologie. PANalytical is wereldwijd marktleider op het gebied van analytische röntgen apparatuur. Grof gezegd hebben ze twee soorten producten: XRD (X-ray diffraction) en XRF (X-ray fluorescence spectrometry) Met deze apparatuur kunnen materialen worden geanalyseerd. Met XRD kan vooral de structuur en laagdikte gemeten worden. Met XRF vooral de samenstelling, dus welke elementen in welke hoeveelheid in een materiaal voorkomen. PANalytical heeft te maken met de afnemers van hun producten, de analytische röntgen apparatuur. Deze afnemers komen uit de industrie en farmacie, maar ook uit het onderzoeksveld. PANalytical onderscheid zich tegenover de afnemers door technologische kwaliteit maar vooral ook door een goed service/sales netwerk.

Binnen PANalytical is **Folke Meijer** mijn voornaamste contactpersoon. Dhr. Meijer is de Manager Marketing Services binnen PANalytical.

[verdere beschrijving structuur PANalytical]

Projectkader

Sinds krap twee jaar is PANalytical verkocht door Philips aan Spectris. PANalytical mag binnen deze Spectris groep in zeer grote mate onafhankelijk handelen. PANalytical is een zelfstandig merk geworden, wat niet het geval was als dochter van Philips. De veilige positie binnen Philips is dus niet meer. De afgelopen twee jaar is er veel gedaan aan het creëren van een nieuwe onafhankelijke identiteit. Hier komt **Frans Joziassse** in beeld. Hij is directeur van PARK design management en is extern ingehuurd door PANalytical. Dhr. Joziassse is nauw betrokken bij het branding proces.

De basis van de brand PANalytical is gemaakt met het EBL systeem. EBL staat voor Experience Brand Language. Voor alle aspectgebieden van PANalytical zijn EBL's gecreëerd. Op grote borden wordt aan de hand van steekwoorden de identiteit van PANalytical geformuleerd. Deze steekwoorden worden dan later weer converteert naar design aanbevelingen. (kleuren, lettertypen en vormgevingselementen)

In het kader van het EBL (Experience Brand Language) project voor PANalytical zijn er manuals gemaakt. Elk aspectgebied binnen PANalytical heeft zijn eigen manual. Denk hierbij aan copy, product, graphic, web, imagery, booth, behaviour, 3D en user-interface. In deze manuals worden de designprincipes en brandstandards voor de toekomstige vormgeving vastgelegd. De manuals worden op 1 januari naar de markt toe gecommuniceerd. Begin oktober zal er met het internal branding proces worden gestart. 'Internal branding' staat voor het proces van het overbrengen van de identiteit van het bedrijf naar haar eigen werknemers. Deze manuals zijn dus een belangrijke tool voor het implementeren van PANalytical's nieuwe brand personality en identity in de organisatie, maar ook naar de externe markt. De manuals zullen gebruikt worden door verschillende medewerkers maar ook door externe toeleveranciers.

De huidige manuals zijn allemaal door verschillende designbureau's ontworpen. Er mist een zekere **consistentie** tussen de manuals. PANalytical is op zoek naar een eenduidige navigatie en 'look and feel' voor alle manuals. Er zal onderzoek gedaan moeten worden naar de toekomstige externe/interne gebruikers van de manuals. Wanneer en waar en hoe gaan deze gebruikers de manual gebruiken? De vormgeving van de manuals moet daar op afgestemd zijn.

Doelstelling

*De doelstelling van dit onderzoek is het ontwerpen van een eenduidige navigatie en een 'look and feel' voor **alle** manuals van PANalytical. Als basis van het ontwerp staat een analyse van de behoeften van toekomstige (externe/interne) gebruikers.*

Vraagstelling(en)

Centrale vragen

- 1) Wat zijn de inconsistenties binnen de huidige manuals?
- 2) Wat zijn de behoeften van de toekomstige externe/interne gebruikers van de verschillende manuals?
- 3) Welke navigatie en vormgeving is op de manuals toepasbaar zodat de behoeften van de gebruikers voldaan worden?
- 4) Voldoet de vormgeving en navigatie van de manual 'Product Design' aan de behoeften van de interne gebruikers binnen het Asterix project?

Deelvragen

- 2a) Wie zijn de toekomstige externe/interne gebruikers van de verschillende manuals?
- 2b) Wanneer en waar gaan de toekomstige externe/interne gebruikers de verschillende manuals nodig hebben?
- 2c) Welke informatie hebben de externe/interne gebruikers nodig uit de verschillende manuals op de verschillende momenten van gebruik?
- 3a) Wat voor vormen van navigatie zijn er mogelijk voor de manuals?
- 3b) Welke vorm van navigatie is het meest geschikt voor de externe/interne gebruikers?
- 3c) Welke vormgeving is ideaal voor het vervullen van de behoeften van de externe/interne gebruikers?

Kernbegrippen

Experience Brand Language

Een methode van branding. Op grote borden staat wordt aan de hand van steekwoorden de identiteit van PANalytical geformuleerd. Deze steekwoorden worden dan later weer converteert naar design aanbevelingen.

Manual

Een handleiding voor de vormgevingselementen binnen een bepaald aspect van PANalytical. Binnen PANalytical zijn er manuals voor de volgende aspecten: copy, product, graphic, web, imagery, booth, behaviour, 3D en user-interface.

Asterix-project

|Omschrijving Asterix Project

|Omschrijving Asterix Project

Onderzoeksafbakening

- Het navigatie en 'look and feel' concept dat op alle manuals toepasbaar is, wordt in detail toegepast op de manual 'Product Design'
- Het ontwerp voor de manual 'Product Design' wordt getest binnen het Asterix project.

Onderzoeksstrategie

In dit gedeelte van het plan van aanpak wordt per centrale bekeken hoe die beantwoordt gaat worden.

1) *Wat zijn de inconsistenties binnen de huidige manuals?*

Deze vraag is te beantwoorden door alle huidige manuals te bestuderen en daarna een analyse te maken van de overeenkomsten en de verschillen tussen de manuals.

Onderzoeksbronnen: de huidige manuals, EBL borden

2) *Wat zijn de behoeften van de toekomstige externe/interne gebruikers van de verschillende manuals?*

Om deze vraag te beantwoorden zal er een survey gehouden moeten worden. Door gesprekken met verschillende werknemers van PANalytical te houden moet er een overzicht gemaakt worden voor de verschillende groepen externe/interne gebruikers van de manuals. Nadat dat groepen gebruikers zijn bepaald, moeten van de verschillende groepen de behoeften in kaart worden gebracht. Dit kan door middel van gesprekken met gebruikers uit de verschillende groepen, maar ook door eigen redeneringen. Een voorbeeld hiervan: 'De secretaresse wil wel weten waar het logo geplaatst mag worden, maar niet uit welke exacte kleuren het bestaat.'

Onderzoeksbronnen: werknemers bij PANalytical, documenten bij PANalytical, externe gebruikers manuals

3) Welke navigatie en vormgeving is op de manuals toepasbaar zodat de behoeften van de gebruikers voldaan worden?

Deze vraag is te beantwoorden door een analyse te maken van de behoeften van de verschillende gebruikers en deze te transleren naar design- en navigatieaanbevelingen voor de manuals. Er moet gekeken worden welke navigatiemethode het geschiktst om aan de behoeften van de externe/interne gebruikers te voldoen. Verschillende mogelijke navigatiemethoden: intranet, informatiezuil, drukwerk, dvd, interactive media.

Onderzoeksbronnen: huidige manuals, EBL borden

4) Voldoet de vormgeving en navigatie van de manual 'Product Design' aan de behoeften van de interne gebruikers binnen het Asterix project?

Deze vraag is beantwoorden door een het uitvoeren van een **gebruikstest** met de manual 'Product Design' binnen het Asterix Project. De manual 'Product Design' moet gebruikt worden door personen binnen het Asterix project, en daarna moet men vragen beantwoorden over het gebruik ervan.

Onderzoeksbronnen: gebruikstest resultaten

Delivarables

- Een navigatie en vormgeving stramien wat op elke manual is toe te passen.
- Uitgewerkte Manual 'Product Design'
- Een gebruikersstructuur voor de manual 'Product Design'
- Een schriftelijk verslag van de totale opdracht

Toelichting onderzoeksplanning

Voor het gehele onderzoekstraject staat een tijd van 14 weken. De planning is opgedeeld in een **onderzoekstraject** en een **schrijftraject**. Het schrijftraject loopt grotendeels parallel aan het onderzoekstraject. Allereerst een beschrijving van het onderzoekstraject.

Onderzoekstraject

In week 1 wordt er gestart met het plan van aanpak (dit huidige document). Daarna wordt er in week 2 de overeenkomst met PANalytical getekend en kan de introductie binnen het bedrijf gaan beginnen. Er kan in week 2 al begonnen worden met het bestuderen van de huidige manuals. Het onder de loop nemen van de manuals loopt door tot week 4. Tijdens het bestuderen van de manuals wordt er al een eerste analyse gemaakt van de gebruikers van de manuals en hun behoeften. Vanaf week 4 wordt er 'fulltime' gewerkt aan het uitwerken van de verschillende gebruikers en hun behoeften. Parallel hieraan worden er een voorbereiding gemaakt voor de gebruikstest van de manual 'Product Design' aan het einde in week 12. Ook kan er parallel aan het analyseren van de verschillende gebruikers en hun behoeften in week 4 worden gestart met een oriëntatie op de mogelijke verschillende navigatie methoden.

Week 7 t/m 11 zijn gereserveerd voor het daadwerkelijk ontwerpen van een nieuwe structuur en look and feel voor de manuals. Deze wordt in deze periode ook in detail uitgewerkt voor de manual 'product design'.

In week 12 wordt de manual 'product design' getest worden binnen het asterix project. De voorbereidingen van deze test zijn al in een eerdere fase gedaan.

Schrijftraject

Het schrijftraject loopt parallel aan het onderzoekstraject. Bij de meeste onderdelen van het onderzoekstraject wordt er parallel gewerkt aan het verslag. Voor het uitwerken van het eindverslag staan week 13 & week 14 gepland.

Knelpunten

Het valt direct op dat de planning in zijn algemeen vrij strak is. Lange uitlooptijden zijn in de relatief korte duur van 14 weken niet te permitteren. De planning moet goed aangehouden worden om niet in problemen te komen. Bij een eventuele vertraging op de planning moet er worden ingegrepen door het plan van aanpak te wijzigen.

Vooraf op het einde van het totale project zijn de grootste knelpunten te vinden. Het houden van de gebruikstest van de manual 'Product Design' en het completeren van het eindverslag zit erg krap op elkaar. De gebruikstest dient van tevoren al goed zijn voorbereid, zodat onverwachte verrassingen op het einde worden voorkomen.

Ook het onderdeel "Analyseren gebruikers & Behoeften" in het onderzoekstraject zou eventueel voor knelpunten kunnen zorgen. In dit onderdeel moet namelijk informatie aangeleverd worden vanuit het bedrijf en vanuit externe toekomstige gebruikers van de manuals. Dit kan altijd onverwachte vertragingen opleveren. Daarom is er dus ook voor gekozen om al in de eerste weken contact te zoeken met de juiste personen binnen PANalytical.

Contactpersonen

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Manual User Map Product

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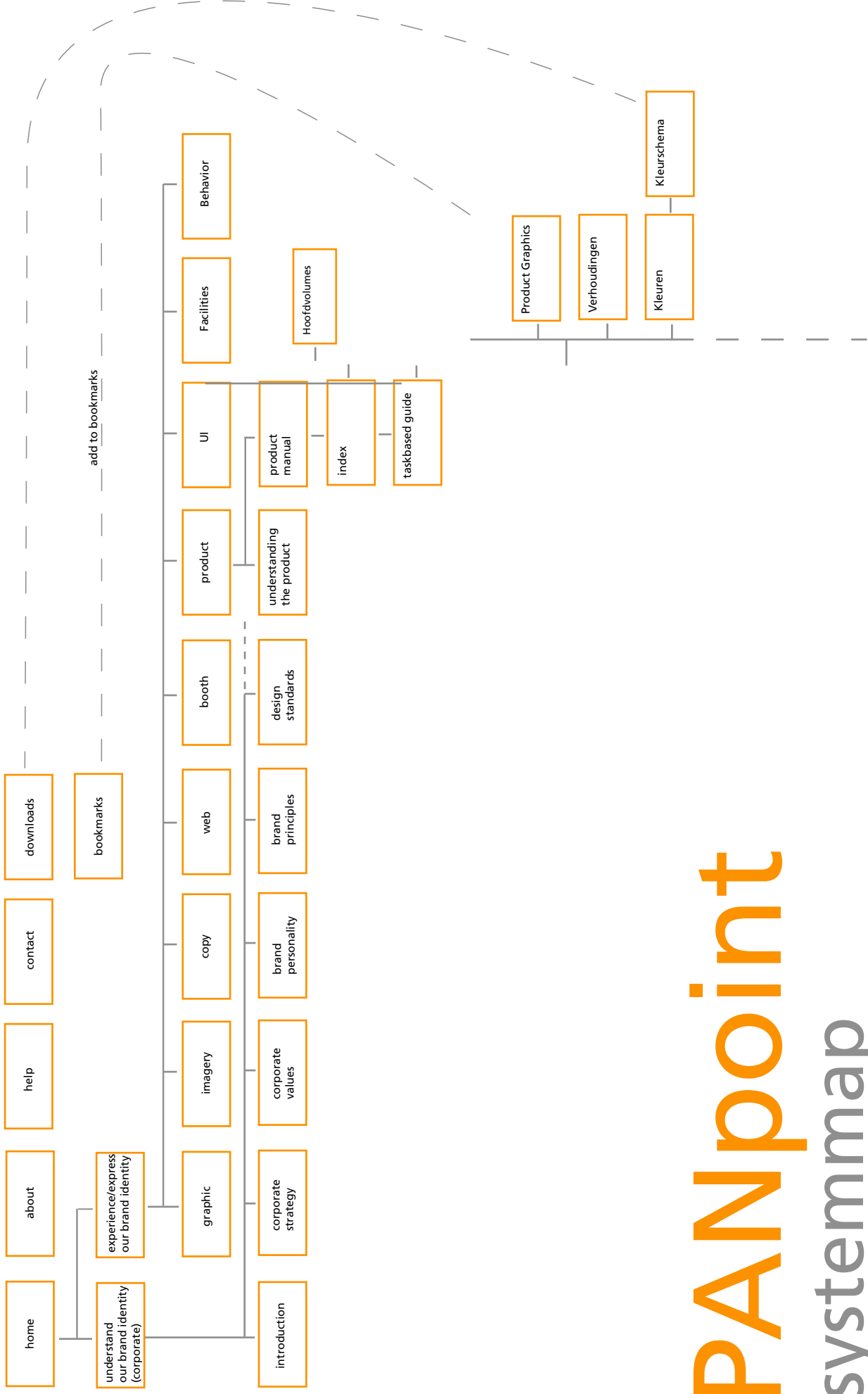


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	Internal	External
All	Dep: Development	Com: Van Berlo
	Dep: Marcom	
	Dep: BU management	

Approved by E. Reuvekamp





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