

# Documentation Guidelines

## Milestone/Midterm Critique

I694

FALL 2022

GY 4068

Sai Shruthi Chivukula

### DESCRIPTION

Documentation is a very essential part of the design process. We go through so many decision making processes and divergence paths; often all of them are very instantaneous.

**A milestone document is NOT your workbook or your designer notes.**

**A milestone document is NOT a diary of what happened every week in your process (IoR has the syllabus for it)**

**It is not a slidedeck, either!**

### Format

A Single PDF.

Not a PDF with an external link to another document.

### What is expected of the Milestone document?

A milestone document is a stand-alone document (not a one page with a link to another working document) that you create to provide an *organized* overview of what you have done and achieved in your design process. This document is something you share outside your own daily documentation with (potentially) following aspects:

- **A Title Page:** Often a cover page with a title (e.g., designing for... ), an image that quickly catches attention to what your topic might be about, your name (who are you? What is your name? Are you a grad student?)
- **Table of Contents:** Description of what can be expected of this document and page numbers to quickly jump to that page
- **Executive Summary Page:** Summary or Abstract of what the project is about or that particular milestone. Later, Why is the reader looking into this document? What can they expect from this document? *Probably a reference to your promised milestone from your learning contract.*
- **Synthesis/ Takeaways relevant to Design Conjectures/ Insights:** Synthesis from all the design work you are doing might have to indicate the direction towards your next design steps or conclusion of the current design step. The story does not stop at "I did this...". The story must end at "*So what for your design process?*"
  - **Use of (adopted/ created) Info-graphics:** Information about design stages or design process to contextualize your work for the readers. This can be about process stages, or infographics you created to easily present your synthesis of research/ design (e.g., empathy maps, annotations, mind maps, images, etc.)

- **Progression indication:** Clearly identify what you did before this milestone (even a quick summary), what you are to achieve in this document, what are the next steps (in the future). You can use infographics for such purposes.
- **Uniform Visual Language:** A set style of heading styles, font, colors, typeface, etc throughout the document to identify the sectioning and for easy reading through the dense document. A suggestion is to set a document style and use it for the rest of the semester.
- **Rationale-focused text and details:** Text oriented with details of what you did, why you did it, what was the result of what you did (success/ failure), who was involved in the process, why did you read or explore a topic, what was your aim, etc.
  - **Story-telling:** Often, the design process is a designer's story. Identify how you want to share that. If there are instances of divergence in your design frame or anything you have totally taken a re-route from, share those stories with your readers.
  - **Balance between Text and Figures:** Too much text is difficult to follow, too little text is also difficult to understand what you have done and achieved. Maintain a balance between text and imagery.
- **Figure and Table Captions:** Proper numbering and captioning of figures and tables to identify the purpose of the figure and table. Plus, proper cross-referencing of the Figure and table numbers in the text. What should be seen in the figure? Did you create the figure/ table? Did you adopt from somewhere?
  - **Figure Annotations:** Clearly annotate a figure to help us identify what we are looking for in a figure.
- **Detailed text and Description| Contextualized for your Topic:** If listed anything as a part of your take-aways from a reading or created as a part of your synthesis, write/ describe through clear text about what that listed item means. Why is it important for your project? How is that relevant? What does it mean? The same word can mean different things for different readers.
- **Links:** Often these should be a part of your reference list, but if you are to link to any videos you have created as a part of your design process, make sure you clearly identify what that video is about in the document and give viewing access.
- **Citations/ References:** Use APA style format to clearly inline cite your sources and create an alphabetical ordered reference list at the end of the document.
- **Appendix:** Identify what becomes a part of the main body of the document and what can be "linked" into the Appendix of a document. For example, details about your observation (what, why, where, how, etc.) can go into the main body of the document, but maybe your detailed observation notes can be linked in the Appendix.

### **MUST AVOID: Some Common mistakes student make**

#### **DOCUMENTATION CORRECTIONS**

Kindly make sure you correct or improve in these aspects of your documentation:

- **Visual Hierarchy:** Clearly makes sure your heading 1, heading 2, etc are clearly differentiated through font size, color, numbering, etc.
- **Legibility of Images:** Make sure you use different techniques to make sure your images (affinity mapping, journey/ experience maps, visual libraries, etc.) are clearly readable for the readers. You can either place it in Landscape over a full page/ external “Accessible” links/ magnifying some parts of the image/ annotating the images.
- **If you were to print this?:** Imagine how you would section, visualize, or present the information organization on a page as well as a document level if you were to print this document for someone to read it.
- **PROOFREAD:** Kindly re-read your text for grammatical errors, reducing sentences that do not provide any information, and/or improve the text to avoid lack of information.
- **Re-format your document:** If you are not creating this document from scratch and exporting from your digital workbooks, re-format your documents to avoid the clutter it creates with overflowing text into footers or images dividing over two pages, etc.

#### THAT ONE LINE- CLEARLY BOLD AND IDENTIFY YOUR DESIGN FRAME

Lot of you had changes in your frame over time (topic wise or narrowing), kindly make sure you identify that “one line” in bold on a page or section for us to clearly know how things changed or what is the design/ problem frame you are solving for.

#### EXECUTIVE SUMMARY

An executive summary is a quick read to learn about the content and the project being discussed in your document. An executive summary could be a combination of an ABSTRACT + PERSONAL STORY + WHAT ABOUT THIS DOCUMENT.

Let’s section it and see how you could organize and write it.

- **Abstract (Main Section)**
  - What is the broad topic, what part of the broad topic domain are you targeting as a designer, what are you intending to achieve (your design frame and/or problem frame), what are you intending to achieve (not a specific product, but the conceptual direction).
  - Read Examples from your peers: [Akriti Thakur](#), [Nikhil Dinesh](#), [Young Na](#) (From F’22, just picking some from the lot, apologize to have not asked before publishing).
    - **TIP:** Clearly identify key audiences
    - **TIP:** Think how you can talk about your topic/ domain/project goals in 200-250 words. If I were to talk to a domain expert or domain illiterate, what would I tell them about the goals of my project as established in literature or current tech market/research.
  - THIS HAS **NOTHING TO DO** WITH YOU PROCESS STAGE, I694, CHIVUKULA/WANG, LEARNING CONTRACT, WEEKLY UPDATES, etc.
- **What is this document about?**
  - Within your topic domain/ design frame/ goals/ vision, what does this document share information about? What does this particular document help the reader understand about your design project? Where are you in your design process and what do you plan to do next or what is still left to do?
    - **TIP:** This is NOT a table of contents.
- **[X] Personal Story Or Motives (If Any- need not be a part of executive summary)**

- This is an **OPTIONAL** section if you want to talk about personal motives around your project. But, this need not intentionally be as a part of your executive summary, it could be its own page before the introduction to the content to give the reader a personal side of the designer’s story.

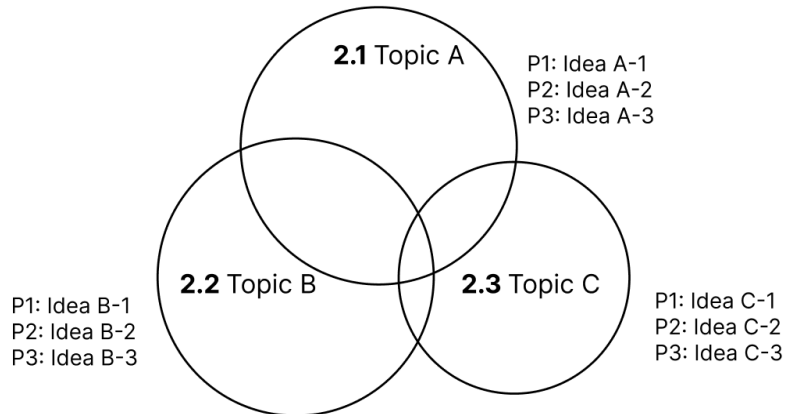
**LITERATURE REVIEW**

Ariel Wang contributed to this section and can reach out to her for more questions and tips.

- **What is important for readers to know before they read?**

- What is \_\_\_\_ (terms you included in your topic)
- You can make use of the areas you included in the framing activity

**2 Background**



- **Categorize the articles you have read into sections**

- Now you have read XX articles, each related to the topics in your framing. (If not, you might need to read more / adjust the topics you have set!)
- Do not only write notes for each individual paper. Write **paragraphs that state your learnings from these articles**. Your sentences might look something like this:
  - When two papers contribute to idea A-1:
    - (Idea A-1.) X and Y paper said\_\_\_\_\_.
    - A research and B research all pointed out that (Idea A-1).
  - Other than A-1, there are A-2 and A-3:
    - Furthermore, Z paper said\_\_\_\_\_ (Idea A-2)
    - Other than idea A-1 and A-2, W and V paper talked about \_\_\_\_\_ (Idea A-3). \_\_\_\_.
- End with a summary about what the current research lacks\_\_\_\_, and **why you need further research to answer the questions you set**.
  - As the authors note earlier, we need more research to understand/explore\_\_\_\_\_.
  - Additional studies to understand \_\_\_\_ are required.

**ANALYSIS + SYNTHESIS**

Every design phase you have such as Secondary Research, Primary Research, Conceptualization, etc., has a Synthesis step that helps you with your design insight or conjecture. These are some things you all could work on:

- **Secondary Research:**

- Clearly identify the top three **sections** of literature review (as heading 1, probably) within your design frame. What did you read in that space? What was the take-away OVERALL? Not per reading.
- Here, Synthesis is not an annotated bibliography.
- **Sub-Synthesis/ Takeaways vs. Triangulated Synthesis:** There can be a small synthesis per each literature review section, but an OVERALL synthesis for the whole of secondary research (across all the methods you use such as competitive analysis, readings,
- **Primary Research:**
  - Clearly identify what is the kind of data (fieldnotes, transcripts, artifacts, etc.) and methodology (affinity, case-study, artifact/content analysis, etc.) for analysis.
  - Elevate the findings with **theme definitions** (tell the reader what that particular theme meant for your project), and **quotes** from participant interviews (ofc, anonymized).
  - Make sure you represent perspectives from the majority or all your participants. It is NOT to prove a point, but to share the thematic resonance among your participants.

### Executive Summary Examples

Akriti Thakur

#### Project Abstract (YAY)

Both gratitude and empathy are important emotions. A person who is grateful (self-focused) focuses on the good things in their life, which can lead to happiness, optimism, a reduction in stress, and contentment. A person who is empathic, or other-centered, is able to perceive the world from the perspective of others, which helps to develop good connections and a stronger willingness to lend a hand and share. When empathy and gratitude are used skillfully, they have the ability to improve all kinds of relationships, both personal and professional. On the other hand, lacking empathy and gratitude might have unfavorable effects.

This project aims to explore – What can we do, therefore, to adopt, practice or improve these abilities? Or how do we provide people with the framework necessary to sustainably and effectively navigate their world with gratitude and/or empathy?

#### Midterm Document Abstract

The purpose of this document is to capture the progress of the project and discuss future direction. Beginning from a position of very little knowledge about the gratitude and empathy domains, my work thus far (Milestone #1 & Learning Activity #1) has focused on understanding and analyzing the gratitude and empathy domain for people from diverse walks of life in order to comprehend the problem space.

In a nutshell, the research on gratitude examined gratitude expressions, their impact on socially motivated behavior, and potential concepts for gratitude interventions (short- and/or long-term). Meanwhile, research on empathy has provided insight into what empathy is, how it is employed and how it links to gratitude.

Based on the information gathered from this research, a design frame is being finished at the time of writing this document (10/18/2022) in order to establish a concise and clear design direction.

Nikhil Dinesh

### **Project Brief**

Urban design and town planning are domains that have a significant impact on our daily lives, yet it is very often overlooked by the public and brushed off as something professionals have to take care of. Although it is a profession that requires training to plan and make the right decisions, it is also a domain that has room for residents to have a say in the matters of the town. Unfortunately, in North American cities and towns, the approach is top-down. Residents and developers have to navigate through many planning-related jargons and confusing policies, that pose major barriers to inclusivity, in order to make sense of what effects planning decisions can have on their daily lives. Even though efforts are being made by architects and planners to make it more transparent, the tools and methods they use usually are unappealing (don't draw enough people to the meetings and therefore decisions aren't really as democratic as they intended) and/or ineffective.

The objective of this project is to explore means that can make the planning process a more transparent and participatory one. What is lacking in the current process? What are the barriers to true participatory design in the field? These are merely a few questions that the project aims to answer.

### **Midterm Document Abstract**

The purpose of this document is to capture the progress of the project and the rationale behind the design decisions I took so far. Starting from a point of little knowledge about the domain of planning and the challenges present in it, it was essential to explore the literature on planning processes and principles of participatory planning to build an understanding of the landscape of the participatory planning domain. In brief, the current and novel practices of participatory planning in academia employ the principles of gamification to engage and extract the knowledge of "local experts" to inform decisions in the planning domain. The secondary research culminated in an original visualization for the conceptual framework proposed by Kunze, A. et al in A Conceptual Participatory Design Framework for Urban Planning (2011) which consisted of three components; collaboration, design, and simulation. From this framework, I was able to determine the aspects of participatory planning that I could analyze and probe into in my primary research. However, there was a large gap in the knowledge of the industry-relevant participatory planning processes. Primary research in the form of interviews with practicing planning professionals was employed to fill the identified knowledge gap. At the time of writing this document (10/05/2022), 2 interviews with 3 participants have been conducted and recruitment for further interview participants is underway. Finally, based on the interviews already conducted, a preliminary analysis has been done identifying key insights as well as a visualization for the workflow for participatory sessions in the industry.

Young Na

### **ABSTRACT**

The role of self-service kiosks has become more than just providing information in our lives. With the advancement of technology and the recent effect of the pandemic, many businesses began to implement the self-service kiosk not only to reduce in-person interaction but also to resolve the labor shortage. As a result, self-service kiosks are now

a frequent fixture in many retailing spaces. A lack of experience and knowledge, however, about the fundamental understanding of technology among senior citizens and technological illiterates raises the question. **If the adaptation of technology in retail businesses is inevitable, how can we design a kiosk interface and system that lets them flawlessly interact with the service?** The research focuses on observing and analyzing the current kiosk system available in the US and hypothesizes the solution in a grocery store environment based on the research conducted.

### Some Resources

- My design documentation process:  
<https://designstrategy.guide/design-management/design-documentation-process-why-is-it-important/>
- How to build a design documentation culture from scratch:  
<https://uxdesign.cc/how-to-build-up-the-design-documentation-culture-a425ef5ecbf7>
- Best Practices on Managing Design Documentation:  
<https://northell.design/blog/managing-design-documentation>
- APA formatting for citation  
<https://www.mendeley.com/guides/apa-citation-guide/>