A Senior Project Presented to
the Faculty of the Graphic Communication Department California Polytechnic
State University, San Luis Obispo

Practices in Designing a Scholarly Journal
and Its Style Guide

by
Monique Martinez

June 2015
© 2014 MoniqueMartinez
Abstract

The purpose of this project was to create a method for designing a scholarly journal by managing all design and print aspects of a Volume II, student produced, journal. The journal, Paideia, included student research papers and alumni successes in the workplace from California Polytechnic State University’s Political Science Department. Responsibilities included inserting text and photos from the Political Science committee, and making a cohesive layout and design with all elements given. Since a new volume of the journal will be assembled each year, a style guide was also produced alongside the journal, for future students to refer to when producing a new volume. The style guide ensures a cohesive brand for Paideia in the future years, as there will be new designers assigned to the journal each year. In addition, finding the best printing solution for Paideia, and obtaining price estimates for various quantities was important in terms of budget.
List of Figures

Figure 1: Navigating to Styles

Figure 2: Paragraph Styles Panel

Figure 3: Find/Change and GREP tools panel

Figure 4: Find/Change Format, using character styles
Chapter One: Introduction

Statement of the Problem
The purpose of this project is to create a method for designing a scholarly journal by managing all design and print aspects of a Volume II, student produced, journal. The journal, Paideia, includes student research papers and alumni successes in the workplace from California Polytechnic State University's Political Science Department. Responsibilities included inserting text and photos from the Political Science committee, and making a cohesive layout and design with all elements given. Since a new volume of the journal will be assembled each year, a style guide was also produced alongside the journal, for future students to refer to when producing a new volume. The style guide ensures a cohesive brand for Paideia in the future years, as there will be new designers assigned to the journal each year. In addition, finding the best printing solution for Paideia, and obtaining price estimates for various quantities was important in terms of budget. Price estimates depend upon the design elements, such as color photos versus black and white photos, spot varnishes, fonts, and the book's spine design. As Richard Hendel writes in Book Design, “Book designers serve two clients: the author and the reader. Design decisions have to be made in relation to how publishing costs fit within a manufacturing budget, which is usually determined long before designing starts”.

Significance of Problem
This project, including the research paper and style guide, will help designers in need of guidance in layout design, focusing in Adobe's application, InDesign. In establishing a style guide for this journal, cohesiveness is ensured for future volumes, and acts as a resource to help designers find a style that suits their unique project, and the most important items to include within the style guide. Simple, and clear instructions will ensure success for future versions of Paideia, speaking to the workflow of this project.

Interest In the Problem
This project, as expected, was a great learning experience. Consulting with clients is an important part of any job, and this project allowed many opportunities to better understand the best practices when doing so. Some aspects of consulting with the client included adjusting to customer decisions, and having real deadlines that could have had a negative impact on the outcome if not met. If pursuing a career in graphic design, a project such as this, or similar, can help any graphic designer grow in their skills because it helps focus all attention to detail. Interest in learning the best ways to developing a style for a book, and keeping a consistent, well-organized workflow is a quality needed for this type of work. The hope for this project is that it will aid others when assigned similar projects, whether it be with InDesign tools, or even workflow design.
Chapter Two: Literature Review

Introduction
Designing a scholarly journal is much different than designing for a company logo or graphic print. There are rules to follow, and tools in Adobe's layout application, InDesign CC, that make the process simpler and more attainable. According to Simon Fraser University, a scholarly journal includes “original research articles, written by researchers and experts in a particular academic discipline.” Each article within the scholarly journal is peer reviewed, which means “The article is given to a panel of peer reviewers to decide if the work is of current interest, original and accurate.” The reviewers are experienced scholars in the same field as the author, as well as the designer’s clients (Rutgers, 2006). There is not one specific way to go about achieving the printed reading material, but through research and experience, a successful process can be found. Successfully printing and designing for a scholarly journal from the Political Science Department at California Polytechnic State University allowed for achieving a process. Through experience with the journal, Paideia, a systematic method for designing was developed, referencing a combination of resources, as well as developing design techniques, using Adobe InDesign, part of the Adobe Creative Suite. Lastly, a style guide was assembled to ensure consistency for future versions of Paideia, as well as to act as a reference for those who wish to create a style guide for their own journal, or brand.

Consulting With The Client
As with any other client, it is important to be organized and follow procedures to become successful. As the designer, assume the client will have set the deadlines, and it is up to you, the designer, to meet them. A contract is made upfront, discussing the pay, how long the project will last, and what is required and expected. Having well thought-out questions prior to the meeting is an important aspect as well. Some things to consider are, the given text format from the client, the expected style from the client, formats in delivering drafts to the client, and printer requirements for the chosen print process. One must keep in mind that a scholarly journal must have a professional feel.

Creating The Document
After speaking with the client, creating the document is the first step in the design process. Adobe InDesign is the application used to create the cover and insides of this scholarly journal. The first step is to create the document’s size, and define accurate marks and bleeds. According to Brinhurst, a good measurement for a bleed is 0.125 inches (2014). The cover design will usually be given to the printer separate from the inside pages, since it is printed on thicker stock, and will require finishing and printing processes, such as a spot varnish, or coating, which the inside pages will not need. The inside pages were printed on thinner stock, with a lower basis weight than the cover. Discussing paper options with the printer is important when deciding pricing.
Start With Paragraph Styles
Once the client provides content, creating Paragraph Styles will allow the process to better flow. Style tools were invaluable in this whole process because the designer is able to define styles for body text, titles, headings, subheads, footnotes, bibliographies, and more, making it cohesive and correct. Paragraph styles allows you to create a specific style for a group of text, such as the main body text, which defines the font family, font style, font size, leading, kerning, tracking, alignments, and more. Naming the paragraph styles with specific names is important, and can help avoid confusion to anyone looking at your file. When finished naming the styles, there could be more than fifty styles and it can get confusing if you are not organized. Clearing overrides in the Paragraph Styles panel will also help keep organized.

According to Dijstelberge (2012), “In order to give a complete description of a printed book, two approaches must be combined. The first progresses from the first page to the last and enumerates the different types of content and the relationships between them.” (p. 7). To define the styles, start by identifying the body text. A good rule for body text is to have serif and readable text such as, Baskerville, Adobe Garamond Pro, Minion, Caslon, Chaparral (French, 2012). From there, begin stylizing other text elements.

Using Find/Change and GREP
When importing text into InDesign CC from an outside source, such as Word, there can be “local formatting” applied to the text, which can create
unwanted characters or styles within the text. In a Word document, the creator will most likely change the font size and character style. Using the “Find/Change” commands can simplify the problems that come from this. For example, if the imported Word Document contains bolds and italics, making a character style and using the Find/Change tool will allow the document to recognize that it is not overriding the Paragraph Style, only changing certain words or phrases into a unique Character Style, as shown in Figure 3. When other problems occur, such as unwanted spaces, returns, or hyphens, using the Find/Change tool and GREP will save time by formatting all characters in the document at once. GREP is an acronym for globally search a regular expression and print. According to Otter Coster, “GREP styles are character styles that InDesign applies to a specific part of the text in a document…With this language you can describe patterns in the text that need to have special formatting applied” (2010). Using codes within GREP can take practice, but is worthwhile.

Images
Adobe Photoshop is the application used for images within the journal. With colored images, RGB is the default mode, yet may need to be converted to the printing device’s CMYK color profile before exporting to a PDF, since a printer uses CMYK, not RGB. If you are using black and white images, convert them to Grayscale. This step in the process may be accomplished by the printer, yet it is essential in understanding color reproduction. In my case, a spot varnish is placed on the cover, and therefore, a separate, spot varnish plate is needed, and is defined as a non CMYK color. The printer will deal with all color and varnish separations, but it is your job to make sure your colors are well-defined within your document you send to them.

The resolution of the image is another important aspect of the process. For print, all images should not be lower than a 300 PPI resolution. If it is lower than 300 PPI, this may cause the images to appear pixelated.
when printed. To ensure customer satisfaction, proofing must also be done before printing all of the journals. “Today, as the workflow has gotten increasingly digital and proofing technologies have evolved, the process has gotten simpler—but no less important” (The ABC’s of Proofing, 2005).

Output
Printing the journal is a true test to see if the document has been designed accurately. Embedded files need to be used when exporting to a Portable Document Format (PDF). The format of your final document depends upon the printer, yet PDF is very common. The format PDF/X is a common PDF format, which many graphic artists use because of its ability for others to make changes in the document, without having full rights to the document, similar to preflighting the document. Some printers may want the raw InDesign file to view layers and to see how the file has been set up, yet this could be too easily manipulated, and a PDF/X format may be better. There are strengths to both formats; therefore discuss standards from the printer.

The Style Guide
When the process is completed, it is necessary to document by creating a style guide for the journal, which is helpful for future reference to the organization. A brand style guide is a document that references the “specifics of your brand visuals, so that every time you create a new image for your brand – or hire a designer to do so – the guidelines will be in place to maintain a cohesive look.” (Whealy, 2014). Before now, there wasn’t a defined style guide for Paideia. The style guide was created in knowing that there will be future designers working on this journal, which will help them better understand their audience and maintain a consistent feel and look to the design. A style guide “establishes distinct guidelines.” (How to Build a Brand Bible & Visual Style Guide 2013). In a style guide, all aspects of the design need to be addressed to help future designers determine their own designs. Your style guide should consist of design concepts and objectives, book dimensions, book covering and book interior specifications, typesetting specifications, including book trim size, margins, typeface, character list, main text, etc. (Lawler 2015). Shannon Whealy, the founder of Turnaround Design, said, “Be consistent in communicating your brand message, in the products and services you provide, in every interaction with your customers, and also in the visuals that represent your brand”.

Conclusions
Communication and organization are two key elements for designing for a scholarly journal. Open communication with the editors for design changes is key. Using the correct tools such as GREP, Paragraph Styles, and the Find/Change tool will help in the success of the workflow, as well as maintain accuracy. Following the rules, as mentioned in this paper, will allow the printer to perform their job more readily.
Chapter 3: Research Methods & Procedures

The purpose of this study was to determine the most efficient method for designing and producing a scholarly journal, Paideia, for the Political Science Department at California Polytechnic State University. Currently, there are existing methods on how to write a scholarly journal, but no clear methods available for designing a scholarly journal. Specific research objectives included:

- Communicating with the customer: Finding effective ways to present designed material, receiving corrections made by the client, and properly making the desired changes.
- Creating a style guide to reference for future publications of Paideia.
- Successfully printing the journal with PRP Companies in San Luis Obispo, California.

Data Collection Plan

The plan involved meeting with the client many times a month, to ensure work was being productive. A board of ten people from the Political Science Department at California Polytechnic State University concluded their views on the cover design, out of seven color and design options that I had provided. During the creation of the journal, there were many edits made along the way, due to newly acquired content and photos. Documenting the journal, whether it was communication in an e-mail, or notes from a meeting, played an important role in the success of this project.

Although the objective was not to increase sales with their journal, the Political Science Department wanted to make the journal professional, to attract outside recognition to their hard work. Gaining a better understanding of sophisticated design, through research, was important in understanding the style of Paideia.

Initially meeting with an employee from the print company helped everyone better understand the timeline of events that needed to take place, as well as the desired product. In printing the journal, the files for the cover and pages with content were separate files sent to PRP Companies in San Luis Obispo. The format for the files was specific, in that the cover required a varnish, and the content pages required embedded photos in CMYK.

Data Analysis Plan

During meetings with the client and print company, taking notes contributed to correct changes to the scholarly journal. Meeting with PRP Companies specifically, allowed professional knowledge of creating and submitting files. Using InDesign CC tools helped to accomplish this project in a timely manner.
Chapter 4: Results

Primary data was collected by working closely with Ashley Stephens, the Executive Editor of Paideia, Volume 2. Results were concluded from receiving feedback, and making accurate changes during the process. Accuracy can speed up the process, and make for a happier and better relationship with your client. Although e-mail is necessary for sending files, consulting face-to-face worked best for instruction. In learning this, there was a process that took place over several months to ensure a sophisticated design was achieved.

Receiving feedback on the cover was the longest process due to having endless layout, color, and font possibilities. For time purposes, it helped to have a leader to speak with about design changes, since an advisory board would have many opinions. In The Designer’s Guide to Meeting Every Deadline, Karl Hodge suggests the first 3 steps to success is to “collect, clarify, and organize” all tasks, documents, designs, emails, etc. to systematize your workflow. Documenting all changes was necessary for success and for learning purposes.

In picking a new color for the cover, a deep red complimented the Volume I, deep blue, journal well. For future issues, it was decided that the journal will switch back and forth from red to blue each year. One consideration when producing proofs of cover designs between you and the customer, is to print them out because color varies from computer screen to print. This will help ensure satisfaction of the final cover proof by the print provider. The PRP Companies Account Manager, Danal Pitts, said, “If another file after proof has been made, there will be additional charges to cover our time.” This holds true to many print companies, and is an important part of the process to understand as the designer. Charging customers more than the original quote is a possible occurrence, but avoiding this proves more success on the designer’s part, as well as effective communication. In Paideia’s circumstance, there was communication mostly between the account manager, yet the cover was miscommunicated when the Pre-Media Manager showed the first proof of the cover with the varnish. To avoid this confusion, designers should be aware of all employees involved with the project at the print company, and include all of them in all e-mails and meetings. See Appendix for final cover proof.

Another design change that made the layout more cohesive was with the bibliographies. While speaking with the client, conclusions were drawn, in that bibliographies took away from the text and overall layout and design, which Volume 1 portrayed. To avoid bibliographies, footnotes were fully cited in Paideia, Volume 2. This will become consistent in future issues.

To ensure the InDesign file is exactly what the customer desires, printing a hard copy of the whole document before it goes to the printer will allow the customer to make last-minute changes to the document, without having to confuse the printer. Attaching a ‘Client Sign-Off’ Form, as featured in the Appendix, will allow the designer to make appropriate changes.

Once the journal is finished, it must be sent to the printer in the correct formats and with the correct specifications. Some printers may want the designer to have certain color profiles defined, and the most common color outputs are CMYK. Converting all photos and colors to CMYK ensured the best color reproduction possible. In Volume 1, the customer had brought to the attention that the black and white photos looks “grainy,”
which could have been from wrong color profiles, and unconverted colors. Although the customer saw this as a substrate issue, it was most likely caused from the image file, itself. Once all colors were converted, packaging the file with the fonts, and links can contribute to the success of the workflow. Packaging the file ensured that the printer was able to access all links and fonts used in the documents.

When sending packaged, zipped files to the printer, timeliness was key to Paideia’s success. The cover was finished first, and was therefore sent to the printer first, which allowed the process to run on time. For the cover file, the printer unexpectedly wanted the original vector artwork for the spot varnish. When the file was originally sent, an Adobe Photoshop version of the spot varnish link was embedded. If this file hadn’t been sent at the time it had, it wouldn’t have gotten done on time. Therefore, one must send files as soon as they are finished, because printers may have specific needs that a designer is unaware of. The insides of the journal, the text, was sent next. Outlining fonts when appropriate can help eliminate font substitution errors to unique fonts the printer may not have. Printers will most likely ask for exported PDFs, instead of spreads.

The style guide stands as Paideia’s brand identity, with measurements and specifications for future volumes. Guidelines followed by Paul Williams from Ideal Sandbox helped focus the specifications on the “purpose, philosophy and goals” of Paideia.

**Chapter 5: Conclusion**

The purpose of this study was to create a method for designing a scholarly journal by managing all design and print aspects of a Volume II, student produced, journal. Finding the best printing solution for the journal, Paideia, and creating a style guide ensured a cohesive brand for its future. Although there is not one right way to design a scholarly journal, these approaches outlined within the paper help save time. Becoming familiar with the InDesign tools will save your customer money, by making quick edits using InDesign CC tools.

Various meetings were held with the client to ensure communication was effective, and progress was made. Transparency with both customers and printers, in terms of deadlines and problems that arise were needed to plan for success. Planning for success also included planning for failures. There will be miscommunication, and unnoticed errors, planning for these ahead of time, ensuring enough time for production is critical throughout the process.

The Paideia journal was printed at PRP Companies, and collected by the Political Science Department on May 13th, 2015. The deadline was met, and the customer was happy with the outcome. This was a definite Learn By Doing, student-run project as well as a rewarding project in the end.
References


Retrieved from https://www.rci.rutgers.edu/~estec/tutorials/scholarly.htm

### Quotation

**Quotation Number:** 37785Est  
**Job Number:** 264230  
**Quotation Date:** 2/2/2015  
**Sales Rep:** House  
**Account Manager:**  
**Terms:** 50% Deposit Req

---

**Customer Account:**

**Name:**  
**Address:**  
**Contact:**  
**Phone:**

---

**Job Description:** Political Science Academic Journal  
**Perfect Bound Book**

---

#### Component: Covers

<table>
<thead>
<tr>
<th>Size</th>
<th>Stock Description</th>
<th>Color</th>
<th>Thickness</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 7/8 X 8 1/4</td>
<td>12pt C1S Kromekote Gloss Cover</td>
<td>White High Gloss</td>
<td>.0120</td>
</tr>
</tbody>
</table>

---

#### Component: Text pages - color

<table>
<thead>
<tr>
<th>Size</th>
<th>Stock Description</th>
<th>Color</th>
<th>BWT</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 7/8 X 8 1/4</td>
<td>Offset-Smooth-u</td>
<td>White</td>
<td>70</td>
</tr>
</tbody>
</table>

---

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
<th>Sales Tax</th>
<th>Total W/Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>250</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>300</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Client Approval / Sign-off

Job Name: Paideia 2015
Client Name: Ashley Stephens
Date: 4/22/15

If everything is O.K. please sign and return this document to:
Monique Martinez

☐ O.K. as is.
☐ O.K. with corrections as marked.
☐ Please correct and re-submit corrected proofs

PDF via email ☐ Personal ☒ URL ☐

Expected Delivery Date __________________________

The Client will approve and proofread all final designs and type. I encourage you to look over your proofs very carefully. The undersigned client is liable for typographical errors or missing items.

Areas to double check:
• Credits
• Photographs
• Biographies
• Grammar
• Spelling of names
• Graphic images
• Captions
• Page numbers and Table of Contents

Client Signature __________________________ Date __________________________
Style Guide

2015
This style guide was made to ensure a cohesive brand for the future of *Paideia* of California Polytechnic State University's Political Science Department.

Each year, it must demonstrate sophistication, as it is a scholarly journal.
Contents

01 Colors
02 Greek Spelling
03 Specifications/Typography
04 Specifications/Typography
05 Specifications/Typography
06 Cover Specifications
07 Cover Example
08 Logo Usage
This the correct spelling of Paideia in Greek.
Book trim size: 5.875 in x 8.25

Bleeds: .125 in

Margins: 4.875 picas top, 4.6 picas gutter

Typefaces: Adobe Garamond Pro, Times New Roman, & Bembo Book MT Pro

Main Text: Adobe Garamond Pro Regular 10/13, 36 text lines

Copyright: Adobe Garamond Pro Regular 8/10, left justified, no hyphenation
**Footnotes:** Adobe Garamond Pro Regular 8/10, left justify, indent 0.1528 in, hyphenate words with at least 5 letters. Position corresponding footnote at bottom of the page., fully cited

**Section Titles:** recto or verso, 10.75/12 Adobe Garamond Pro Regular, caps, flush left at top

**Title Page**
*Paideia Title:* Bembo Book MT Pro Regular 47/27, caps, align center
*Subtitle:* Bembo Book MT Pro Regular, 13/27, caps, align center
*Volume:* Adobe Garamond Pro 10/13
*Quarter & Year:* Adobe Garamond Pro Italic 10/13
*School:* Adobe Garamond Pro Italic 10/13
PAIDEIA Specifications

City: Adobe Garamond Pro Italic 10/13

Cover: Bembo Book MT Pro Regular 57pt
Subtitle: Book MT Pro Regular 26pt.
Pi Sigma Alpha: Book MT Pro Bold 14pt/16.8
Omicron Gamma Chapter: Book MT Pro Regular 12/14.4
Spine Copy: Bembo Book MT Pro Regular
Font size will depend upon the thickness of the journal.

Beginning of Contributor’s Bio
Chapter sink: 2.35 in.
Section title right- after every title and name of contributor before main text.
As discussed with the Paideia team, future versions may alternate between red and blue, each year. The spine will contain the year it was published, no text on the back.

A spot varnish with the Greek letters of Paideia, will be applied to the entire front cover, back cover, and spine. The varnish should not be applied to any of the white parts on the whole cover.
Correct Usage of Logo

1. gray text: C 64% M 56% Y 53% K 28% on white
   or
2. white text on Paideia blue or Paideia red

black and white or green and white Cal Poly logo