

Anthrobytes
Consulting
PO Box 52827
Riverside CA 92517-3827
Voice: 909.369.8590
Fax: 909.683.3137
www.anthrobytes.com
anthrobytes@anthrobytes.com

Project Plan

for

Your Company User Manuals

**PREPARED FOR
YOUR COMPANY**

Reviewed and accepted.

Signature: _____

Written by Anthrobytes Consulting
April 7, 2003



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Summary

Each item in the following table is explained in detail in this proposal.

Deliverable	Time	Cost
Template design for manual. Concurrent with below.	3 days	Free (normally \$1000)
Develop task flow chart and document plan for manual, concurrent with conversion, below.	2 weeks	
Convert current related manual to FrameMaker	1 week	
Create a Getting Started sheet, similar to the ones Hewlett Packard includes with their printers. Concurrent with below.	3 weeks	
Rewrite and add new material to create manual for new products.	3 weeks	
Usability test, resulting changes, final reviews and resulting changes to the product documentation	2 weeks	
	Total	8 weeks
		\$ XX,000.00

Tools

FrameMaker 7.0

Visio

Acrobat 4.0

Deliverable formats

PDF manual and Quick Start sheet, suitable for printing

FrameMaker files

Description of the Documentation Need

This proposal describes our solution to meet the documentation needs of Your Company.

- Your Company needs the existing manual for a your product machine to be updated with new information about the new product. There is an existing manual for a similar product.
- Currently, the return rate for this line of your products is 10%. The actual defect rate is 3%, leaving a 7% return rate for non-defective reasons. Anthrobytes Consulting thinks more useful and appropriate user documentation can reduce the return rate by at least 3%, which will result in a significant cost savings.
- Anthrobytes Consulting will reorganize and re-write the information provided by Your Company. The current manual for the existing machine has at least the following problems:
 - The pages are dense with text, making the manual look hard to read or understand. Usability tests show that users prefer to read pages that look open and inviting. Comprehension is enhanced when standard design elements, such as white space, are used.
 - The current manual includes few graphics. Anthrobytes Consulting sees a need for many more graphics to show the users pictures of what they are doing. This will help the non-native speakers to better use the register.
 - The current manual seems to be feature-based, rather than task-based. The lack of a task flow results in the user getting lost trying to accomplish setting up the register for their needs. The next manual needs to be more task structured with related topics identified.
 - The current writing style is too advanced for a consumer product. Anthrobytes Consulting will rewrite to a simpler reading level, using simple, active voice sentences, helping non-native speakers.
- A Quick Start fold-out sheet, similar to the ones Hewlett Packard includes with their printers would help the customers. Currently, this information is generally in the user manual, starting on page 13.
- Documentation source is currently in either Word or PageMaker. Anthrobytes Consulting will convert this manual into FrameMaker.
- We create a professional template at no additional charge (usually \$1000) for the manual. This template allows Your Company to present a professional and reader-friendly look for the product documentation.
- Anthrobytes Consulting will follow all Your Company branding requirements.

- The manual will include complete index and table of contents. Related topics will be cross-referenced.
- Your Company also needs technical writing on an on-going basis. That cost is not covered in this project proposal. Anthrobytes Consulting can meet this need. For more information, see Further Projects on page 8.

MANUAL AND QUICK START

The manual will be:

- Reader friendly. The template redesign will create a more open look to the pages that invites the reader to read.
- Task-oriented. Usability tests have shown that users want to know how to use products to accomplish tasks. The manual will focus on these tasks, using a task flow process. The manual will also provide examples. Procedures in the tasks will be identified using a numbered, step by step format.
- Graphical. Flow charts, screen graphics, and other graphics will show the user what is happening and where things are located. Usability studies have shown that users prefer graphics to help them understand the task at hand.
- User-related. Provide information about what the product does, why you want to use it, what problems it is solving, the order in which you should do tasks, and the result you can expect from using the product.
- Cross-referenced and indexed. Related topics will be clearly indicated with hyperlinks in the PDF to those topics. All topics will also be indexed to help the users find what they need. The manual will contain a table of contents and an index.
- Multi-machine. Because we use FrameMaker, we can use the conditional text feature. This feature allows us to create a master book with all features for the entire line. When we need the manual for the low end register, we simply hide the features of the other your products in that line. This reduces costs because we do not have to maintain and manage a separate source for each your product in the line.

The Quick Start sheet will:

- Be similar to the ones Hewlett Packard includes with their printers. We recommend a black and white sheet to keep costs down.
- Be a graphical road map for the user. Graphics will be used where ever possible to reduce localization costs. We see leading the user thru setting up the your product and basic programming in a friendly sheet. Currently, some of this information is in the user manual, starting on page 13.

Project Plan

Anthrobytes Consulting believes in writing planned, structured documentation. As part of that effort, Anthrobytes Consulting creates a complete document plan. Because the current related manual is difficult to use, the document plan for this project is more extensive than future projects need to be.

DOCUMENT PLAN

The document plan includes the following:

- audience analysis
- example user profile(s)
- user scenarios
- task flowchart of the new manual and Quick Start sheet
- manual and Quick Start outline
- usability test plan
- specific project schedule

We do not start writing until Your Company approves the document plan.

The process is **very** important. It is our functional specification and directs and defines our writing and development process.

- The audience analysis and example user tell us to whom we are writing and why.
- The user scenarios provide example user situations. These are useful because they tell us who and what the users are like in their work environment.
- The task flowchart of the current related manual helps us to understand the information that is currently in the related manual. We need to understand what is there and how it is all relates before we can define the task flowchart for the new manual.
- The outline lists the topics and information that Anthrobytes Consulting will include in the manuals and help.
- The schedule specifies what is due and when. it also clearly defines the deliverables.

The planning process is very important. We do not start writing until Your Company approves it. We expect Your Company to suggest and refine the document plan, if needed. After the plan is approved by Your Company, Anthrobytes Consulting only includes the information listed in the outline.

It is important that Your Company carefully review the plan and makes sure that it meets the need before approving. Ignoring this process may result in a manual that Your Company does not like. For more information, see the Project Schedule.

USABILITY TEST

Anthrobytes Consulting wants to conduct a short usability test on the product documentation, after the release date but before the end of the project.

The usability test will involve 2 users who are similar to the example user profile. Anthrobytes Consulting will give these example users the product documents, the product, and a list of specific tasks, such as:

- Set up the your product
- Program the date, time, and tax rate
- Add 3 departments
- Add 2 products to each department
- Print one report

While the users perform these tasks, the Anthrobytes Consulting team watches and takes notes about what the users actually do to accomplish these tasks. After the test is over, the test users are interviewed about the product documentation and how well it related to the task. That feedback will be incorporated into the product documentation.

Anthrobytes Consulting did a similar usability test for a product and documentation for Pitney Bowes. The results of that test are confidential. However, the results did allow Anthrobytes Consulting to make changes to the product and the product documents to enhance usability. The delivered product and documentation met the user needs so well that future revisions were not needed.

Deliverable

At the end of the project, after receiving final payment, we e-mail the following files to the project manager:

- All FrameMaker files, including any graphics.
- A PDF file of the manual.

We also return all source materials.

Project Schedule

While we will have formal reviews scheduled, we may have informal reviews to keep us on track and moving forward.

Reviews may not have gone through our QA process and may contain typographical, formatting, and other problems. These are trivial issues for these reviews. Any time spent pointing out these issues is wasted. Our final QA process corrects these issues.

Time frame	Task
First two weeks	<ul style="list-style-type: none"> • Templates designed. • Current similar manual converted to FrameMaker. • Writers review existing materials and asks questions. These questions may be thru e-mail. • Re-organization of existing material. • Identification of new information. • Document plan completed. • Document plan approved by Your Company.
Third thru fifth weeks	<ul style="list-style-type: none"> • Writers starts rewriting, reorganizing and adding new information to manual and Quick Start, based on the outlines. • Questions asked of Your Company, generally in e-mail. • Sections sent to Your Company for informal review as they become ready.
Sixth week	<ul style="list-style-type: none"> • Final edits to manual and Quick Start sheet. • Anthrobytes Consulting performs internal QA on manuals, checking for grammar, style, punctuation, etc. Quality goal is zero typos or grammar errors. • Final pagination of manual. • PDF files generated. PDF files delivered to Your Company, ready for printing hardcopy.
Seventh and eighth week	<ul style="list-style-type: none"> • Usability test conducted. • Changes made from above test. • Any outstanding writing completed. • Product documentation available to Your Company for final review.

Cost

The following is the estimated cost for this project.

Deliverable	Time	Cost
Template design for manual. Concurrent with below.	3 days	Free (normally \$1000)
Develop task flow chart and document plan for manual, concurrent with conversion, below.	2 weeks	
Convert current related manual to FrameMaker.	1 week	
Create a Getting Started sheet, similar to the ones Hewlett Packard includes with their printers. Concurrent with below.	3 weeks	
Rewrite and add new material to create manual for new products.	3 weeks	
Usability test, resulting changes, final reviews and resulting changes to the product documentation	2 weeks	
Total	8 weeks	\$ 20,000.00

This project needs 1.5 writers. We have additional writers and developers available for this project (see Who We Are on page 15), but they will not be used without prior written permission from Your Company.

Changes to the content of the manual after the document plan is approved is considered outside the scope of the project. Out-of-scope changes add to the cost and duration of the project. Out of scope changes are billed at a rate of \$65 an hour. We will notify Your Company if/when out of scope changes are requested and before we make the changes.

ADDITIONAL COSTS

This proposal does not include travel costs to remote locations, which are billed additionally, after approval has been granted in writing by Your Company. We do not anticipate travel costs on this project.

FURTHER PROJECTS

We can easily cover further projects for Your Company. We can provide as needed writing at the rate shown above. For each project, we provide a written project plan and total estimated cost. After that is approved, we start our writing process.

We do not anticipate future projects to take as long, because we can build on the task flowcharts and usability test from this project.

Payment Schedule

All payments are made to Anthrobytes Consulting. Payment in United States dollars is due on receipt of invoice.

The first payment starts the project. Payment schedule is as follows:

Date	Amount
First week of project	\$ 7,000.00
Week 6	\$ 6,000.00
Delivery of final	\$ 7,000.00

Failure to pay within 15 days of receipt of invoice stops all writing until the account become current. When the account becomes current, Anthrobytes Consulting starts work again.

Ownership

At final payment, Anthrobytes Consulting transfers all copyrights to Your Company. We request a copy of the product documentation for our archives. We reserve the right to show these copies as an example of our work to other prospective clients.

We do not make the product documentation publicly available without previous written permission from Your Company.

Contact People

The contact person on this project is Sharon Burton-Hardin. After contracts are signed, our writers can also be contacted directly.

Needs and Requirements

For this project, we must have the following (not listed in order of importance):

- A purchase order number from Your Company.
- First payment.
- Any Your Company logo files.
- Electronic source files for the existing related manual.
- A your product as soon as one become available.
- Engineering drawings and other specifications in electronic format, such as CGM (drawings) and PDF (specifications).
- Any product specifications for the new your product.
- Any related marketing materials.
- Document plan approved and reviews completed in a timely manner or the schedule will be impacted and project costs may increase. We cannot be held responsible, liable, or penalized in this event.
- We are not responsible for the technical accuracy of the manual, because we depend on Your Company for verification of all technical information during the technical reviews.
- A single person who knows Your Company needs and is capable of answering questions, generally in e-mail, from our writer. These questions must be responded to in a timely manner or the schedule will be delayed.
 - This person must be able to make (or transmit) final decisions about the content, as well as approve the document plan, or transmit approval for the document plan.

About Anthrobytes Consulting

Anthrobytes Consulting, located in Southern California, is a technical documentation and programming outsource company.

We have a proven track record of award-winning documentation for our clients. We can meet all your technical documentation needs, including:

- software manuals
- hardware manuals
- product demonstrations
- online help — HTML Help, HTML-based, and Winhelp
- online documentation, including PDF
- online training materials — CBT and WBT
- template design — online and hard copy
- policies and procedures manuals
- legacy documents converted from one format to another

Our team of writers and developers are experienced in these industries:

- Biometric technology
- Communications hardware
- Consumer products
- Environmental engineering
- Internet development technology
- Mainframe technology
- Medical technology
- Networking software and hardware
- Online training
- Printers and print-related technology
- Project management tools
- Satellite hardware and software technology
- Software products
- SQL and Oracle products
- Voice-activated technology
- Web programmer and developer tools

We are very active in the local chapter of the Society for Technical Communication. See www.iestc.org for our local chapter. We are also members of the Better Business Bureau.

LIST OF AWARDS

Competition	Award and Product
APEX 2001 Web and Intranet Sites.	Award of Excellence for the IESTC web site. See it at www.iestc.org .
2000-2001 United Southern California STC Publication and Online Competition	Sound Advantage: 2nd place for the SANDi Quick Start Card. 3rd place for the SANDi User's Guide. 3rd place for the SANDi Admin Guide. BroadLogic: 3rd place for the Satellite PC Receiver Software Interface Online Reference Manual.
1999-2000 Lone Star Chapter of the Society for Technical Communication World Wide Web Page Competition.	2nd place for the IESTC web site.
APEX '99 One-Person Produced Web and Intranet Sites.	Award of Excellence for the IESTC web site.
1998 San Diego chapter of the Society for Technical Communication Publication and Online Competition.	2nd place for the SitePro User's Guide, Version 3. 2nd place for the SitePro Online Help, Version 3. 3rd place for the Getting Started with SitePro manual, Version 3.
1997 Orange County chapter of the Society for Technical Communication Publication and Online Competition.	2nd place for the SitePro Online Help, Version 1. 3rd place for the SitePro User's Guide, Version 1. 2nd place for the RoboNEWS newsletter. (Since discontinued).
1996 Orange County chapter of the Society for Technical Communication Publication and Online Competition.	1st place for the MicroSim EDA Software Tools online help systems.

LIST OF CLIENTS

Client	Projects
activePDF	Wrote the developers manuals for their PDF tools products.
ActSoft	Converted a manual into an online help system for their courier product.
ADP, Inc.	Wrote disaster recovery policies and procedures for a backup mainframe site in the event the primary site goes offline.
Array Technologies	Wrote an end user manual for a commercial printing product. We are converted the FrameMaker files to HTML-based help, using Web Works Publisher.
BroadLogic	Wrote several award-winning manuals for satellite technology products.
Business Engine Software	Wrote HTML-based help for a complex enterprise project management tool.
Castelle	Wrote the manual for a network product that sends and receives faxes from a PC workstation.
Chemicon	Update and index a product catalog once a year.
Day Corporation	Wrote white papers and other technical documentation for their line of internet development products.
Elevon	Wrote the online help for their enterprise budgeting and forecasting software.
Environmental Software, Inc.	Anthrobytes Consulting won several awards for the manuals and online help we produced for this client. See the List of Awards page for more information.
Evolution Robotics	Writing the programming manuals, white papers, and other product documents for this client.
Genie, Inc	We are writing a more usable manual for their garage door openers.
Hewlett Packard	Wrote the developer's manuals, white papers, and tutorials for e-Speak, a web developer's tool. We worked on other projects for related tools.
I/O Software, Inc.	Wrote the user guide and online help for a biometrics software/hardware application. The documentation was translated into several languages.
Jaco Software, Inc.	Wrote the user's guide for their contacts manager.

Client (cont.)	Projects (cont.)
Jettis	We wrote a programmer's manual for their electronic payment software.
Mobile Automation	Writing the online help for a product that manages desktops, laptops, servers, and hand-held devices from any location thru one console application.
MicroSim, Inc.	Anthrobytes Consulting won awards for the work we did for this engineering software tool suite. See the List of Awards page for more information.
NARISK	We write the manual for this client's insurance claims database product.
Omnitrans Transportation Systems	Wrote the procurement policies and procedures for this mass transportation agency.
Pitney Bowes	Developed an add-on software program for their bulk mailing application. We also wrote the online help and paper documentation for the add-on.
Riverside Transit Authority	Wrote Requests for Proposals and Procurement policies and procedures for this mass transportation agency.
Royal Consumer Products	Writing manuals and Quick Start Sheets for their cash register line. Our revised manuals are saving the company in both support costs and reduced return costs.
StarGazer Aviation	Helped this private airline company update their FAA manuals.
Sound Advantage	Wrote the manuals for their voice-activated phone manager. We served as their entire documentation group.
Sterling Software, Inc. Information Management Division	Anthrobytes Consulting designed the template for the hundreds of manuals the Sterling Information Division moved to online PDF format. We also designed the online help template for the help systems.
Sterling Software, Inc. Storage Management Division	Wrote and edited manuals for tape systems and other mass storage devices for mainframe environments.
SyncEssentials	Wrote the HTML (chm) help for a stock management product. We also developed a Java serverlet for their product.
V-Tek Systems	Wrote several user's guides and a quick start card for their web-based data warehousing product.

WHO WE ARE

Sharon Burton-Hardin owner	Well known in the Southern California area, Sharon has been a technical writer and consultant for nearly 13 years. Sharon co-chaired the committee that created the Certificate for Technical Writing program for the University of California, Riverside Extension program. She continues advising the Assistant Dean and teaches for the program.
Barbara Browning bookkeeping	Barbara has many years of experience in accounting in many industries, from mortgage banking to documentation companies. We do what she says. We have no choice.
Laurie Cavanaugh senior writer	Laurie has her Cisco certification and is experienced with Java and UNIX. She is sharp. We like her.
Bruce Faron senior writer	Bruce is strongest in hardware products. He understands things like radar technology, manufacturing tools, and other non-software products.
Michael Stern senior writer	Michael is a strong, well-rounded technical writer with experience in several industries. He is most experienced in software/hardware manuals. His accounting background makes him an excellent writer for accounting related projects.
Joy White senior writer	Joy has written for every technology, including aerospace, software, and medical. She writes ISO 9000 documents and responses to RFPs. For proposals she has worked on, the approval rate is over 80%.
Charlene Dewbre web developer/ CBT developer/ junior writer	Char is our web technology/WebWorks Publisher expert. She also develops websites, develops in Authorware and Flash, codes in Perl, Java and other languages, is comfortable in Windows, UNIX, Linux, VMS and others.
Carl Ray technical illustrator	Carl does any technical illustrations we need. His art work is excellent.
Other writers and programmers, as needed	A pool of additional writers and programmers. These people offer a wide range of technical specialties and industry backgrounds.