DOCUMENTATION PLAN

LucidChart

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Documentation Plan – LucidChart

Overview
This documentation plan will outline the requirements for the creation of documentation to support the use of LucidChart by novice and intermediate users via PDF and HTML5 outputs within MadCap Flare.

Its purpose is to outline the content needs for the project and to determine the requirements in both time and resources.

This document plan is addressed to the following departments within LucidChart:
- Marketing
- Product Development
- Customer Service
- Client Acquisition and Retention

Scope
The scope for this documentation project includes the creation of the following documentation, using MadCap Flare to generate single-sourced content that can be updated and published as needed:
- PDF User Guide
- HTML5 Help File Portal

Assumptions and Constraints
It is assumed that the users of this documentation will be familiar with online software and that they are intermediate to advanced computer users. The assumption is that they will use this documentation to improve their performance with LucidChart while performing their day-to-day work tasks. Users will not read the documentation from beginning to end. They will instead search for the topics they need. Thus, cross-references and search capabilities will form an integral part of this documentation project.

The anticipated constraints for this project relate to the time required on the part of the writers and editors of the documentation.

Target Audience
There are two target audiences for this documentation project:
- Internal users: beginner and intermediate LucidChart users
- External users (clients): beginner and intermediate LucidChart users

Task Analysis

Internal and external users will use this documentation to aid in the performance of the following tasks:

- Familiarizing themselves with LucidChart
- Learning how to create a LucidChart project
- Creating a simple project
- Working with shapes and shape tools
- Working with lines and line tools
- Unique customizations of charts and diagrams
- Collaborating in real-time with colleagues
- Generating and publishing their creations

Usability Goals (Requirements)

The documentation for LucidChart will be deemed to have met its goals if it allows users to familiarize themselves with LucidChart, create, edit, customize, collaborate, publish and share their charts and diagrams successfully.

Existing Documentation

Documentation currently exists for users within the resources section of LucidChart's website (https://www.lucidchart.com/pages/resource-center?topic=All-Topics&search=null). This documentation will be studied and improved upon to create the updated, single-sourced versions that will be authored within this documentation project.

Design Implications

Using MadCap Flare to author the content for this documentation project will allow the project authors to easily create a unified look and feel for both print and online versions.

Documentation Specifications

The following document specifications will be followed throughout the project.

Platforms Supported

Documentation will be created as a PDF User Manual, accessible using AdobeAcrobat or AdobeReader. The HTML5 Help Files will be available to users via a link that can be accessed anywhere with access to the internet. These files will also be accessible from the Resources page of the website.

Graphics

This project will contain at least 15% images and/or video to help users perform their work related tasks. Graphics will be sourced from the website or from screenshots while working within the LucidChart software.

Distribution and Delivery

All documentation will be delivered in the following online formats:

- PDF User Manual – will be accessed from the Resources section of the website.
- HTML5 Help – will be embedded on the website within the Resources section.

Translation and Localization

As this documentation will be translated into French, Spanish and Mandarin, it will be authored with this in-mind. The following steps will be taken to ensure translation and localization are a priority:

Planning

- Decide on naming conventions and enter them into the project Style Guide.
- **Note:** Having a standard set of conventions for naming will reduce translation costs by ensuring that terms will be named consistently throughout the document. Additionally, this will aid in the global understanding of the document as international readers will have consistent terms throughout.
- Screen Shots: take screen shots from screens where the User Interface (UI) language within Microsoft Word reflects the target languages.
- Use one translator for all document drafts to ensure consistency.
- Complete translation only once the English document is finalized to avoid having to re-translate any changes/edits.
- Prior to translation, send the document to an expert, familiar with the local cultures in all languages in which the document will be translated.

Document Development

- Write short, clear sentences.
- Avoid metaphors and idioms.
- Express important points in the same way each time.
- Follow the Microsoft Style Guide.
- When writing bullets, avoid beginning with a sentence that the bullets complete. Each bullet will include a complete thought.
- Choose direct, unambiguous terms to increase clarity.
- Avoid ALL CAPS.
- Use active voice.

Formatting

- Use ample white space to account for words added during translation.
- Avoid local formatting.
- Do not embed text within images; where screen shots are used, take them on a device where the UI is in the target language.
- Provide extra width in all tables to account for additional words added during translation.

- Provide extra space at the end of each page break to account for additional words added during translation.

Technical Writing Staff

Sara Dorken, the Senior Technical Writer for this project will be responsible for the authoring and management of this documentation project.

Terminology

All terminology will be consistent and will align with the terminology used within the existing LucidChart website.

Process & Schedule

In order to ensure the project remains focused and on-time, the following process and schedule will be followed.

Activities

The following activities will make up the documentation project:
- Software research
- Topic selection
- Separation of concept, reference and procedural content
- TOC outline
- Authoring of content within MadCap Flare
- Sourcing image files
- Revisions
- Translation and localization
- Cross-referencing and indexing
- Building and publishing outputs

Milestones

The following chart outlines the estimated milestones for this documentation project.

Milestone	Estimated Completion Date
Software Research & Topic Selection	February 23, 2019
Sourcing of all Resources	March 13, 2019
Authoring of Topics	March 30, 2019
Revision 1	April 1, 2019
Updating Project	April 10, 2019
Revision 2	April 12, 2019
Translation & Localization	April 13, 2019
Building & Publishing Outputs	April 15, 2019

Milestone	Estimated Completion Date
Project Finalized	April 17, 2019
Wrap-Up & Lessons Learned	April 20, 2019

Resources

Internal Stakeholders & SMEs

The following chart outlines the individuals within LucidChart that will either provide help with the project or that require updates about the documentation project.

Department	Name	Details
Marketing	Craig P.	Will provide content (written and graphic) from a marketing perspective for the documentation project. Will be kept updated on the project throughout.
Product Development	Sam C.	Will provide screen shots and instructional videos as needed. Will act as Subject Matter Experts.
Customer Service	David M.	Will be consulted in the initial planning stages to determine customer needs. Will be kept updated on the project throughout.
Client Acquisition & Retention	Claire F.	Will be consulted in the initial planning stages to determine customer needs. Will be kept updated on the project throughout.
LucidChart Expert	Alanna B.	Will provide screen shots and instructional videos as needed. Will act as Subject Matter Experts.

Risks

Availability of SMEs

Subject Matter Experts are notoriously busy individuals. As with most software documentation projects, SMEs will play an integral part in this project as well. Care will be taken to ensure that

SMEs are contacted well in-advance of the project and that any interviews or required revisions are communicated clearly and effectively.

Review Timelines

Review timelines are always subject to change and thus could affect the on-time delivery of this documentation project. To mitigate this risk, topics will be sent for review as they are developed, in small chunks.

Translation & Localization Timelines

Translation and localization timelines are always subject change and thus could affect the on-time delivery of this documentation project. To mitigate this risk, topics will be sent for translation as they are developed, in small chunks.

Document Revisions

Version	Date	Name	Description
1.0	March 1, 2019	Sara Dorken	Documentation Plan Created