

Shared Services Collaboration Tools Team **WELCOMES YOU!**

GET TO KNOW
QUALITYNET LUCID

Welcome!

Welcome to the Shared Services Collaboration Tools Team! We are happy to inform you about our Shared Services tool, QualityNet Lucid, that will help you succeed in your daily work.



QualityNet Lucid



ESS TOOLS UNIVERSITY

Visit QualityNet University and register for a variety of interactive training classes for each of the Shared Services Collaboration Tools.

The University is located on Confluence at:

<https://qnetconfluence.cms.gov/display/QU/QualityNet+University>.

Here's the catalog of trainings offered.

How does QualityNet Lucid benefit you?

**QualityNet
Lucid**



Effective virtual
whiteboarding tool

How to Access

How to Access

QualityNet Lucid is HARP (HCQIS Access Roles and Profile) integrated. HARP is CCSQ's (Center for Clinical Standards & Quality's) secure identity management portal. You will need to create a HARP account in order to request access to QualityNet Lucid.

Once you have a HARP account, log into HARP at <https://harp.cms.gov/> and request a user role for each individual QualityNet tool.

Access detailed instructions for HARP registration and requesting your user roles at: <https://qnetconfluence.cms.gov/display/HS/HARP#GettingStarted>

QualityNet Lucid

What is it?

QualityNet Lucid, also known as Enterprise Lucid Suite, consists of Lucidspark and Lucidchart. These are two very effective virtual whiteboarding tools that will help encourage fully engaged participants at your meetings.

Participants can collaborate easily both before and during your meetings, and you'll find with Spark's visualization that your team and stakeholders gain alignment faster than ever.

There are a variety of available templates and meeting templates to use in a library filled with charts, diagrams, and infographics including flowcharts, org charts, timelines, and PI planning boards.

QualityNet Lucid

How to access

Detailed instructions for requesting a QualityNet Lucid User Role, and accessing QualityNet Lucid can be found on:

- Lucid Getting started Confluence page:
<https://qnetconfluence.cms.gov/display/HS/QualityNet+Lucid#GettingStarted>
- Once you get your Lucid role approved, login at: <http://qnetlucid.cms.gov/>

QualityNet Lucid

Lucid Homepage

The screenshot shows the Lucid homepage interface with several key features highlighted:

- Search:** A search bar at the top left with the text "Search Lucid" and a search icon. An annotation "Search by Keyword" points to the search icon.
- Notifications:** A bell icon in the top right corner with an annotation "Notifications" pointing to it.
- Enterprise plan:** A dropdown menu in the top right corner with the text "Enterprise plan" and an annotation "Account Settings/Logout" pointing to it.
- Left Sidebar:** A vertical navigation menu on the left side with icons for Home, Profile, and a plus sign. An annotation "Documents Dropdown Menu" points to the plus sign.
- Buttons:** A blue "+ New" button and a "Recent" button are highlighted with red boxes. Annotations "Create New Document, Board, or Team" and "Recent Documents" point to these buttons respectively.
- Starred Items:** A "Starred" button is highlighted with a red box and an annotation "Starred Items" pointing to it.
- Your Documents:** A "Documents" button is highlighted with a red box and an annotation "Your Documents" pointing to it.
- Discover:** A "Templates" button is highlighted with a red box and an annotation "Browse & Open Predeveloped Documents/Boards" pointing to it.
- Suggested templates:** A section titled "Suggested templates" with a dropdown arrow, containing cards for "UML class", "Use case diagram", "Gantt chart", "Mind map", and "Roadmap".
- Recent documents:** A section titled "Recent documents" containing cards for "What went well retrospective activity", "Blank board", "Sprint dashboard example", "PI-4 Retrospective", and "ESS Tools Roadmap".

This block shows a detailed view of the "Documents" dropdown menu. It includes the following items and annotations:

- Documents:** The main menu item.
- My documents:** A sub-item with an annotation "All Documents & Folders You Create & Own" pointing to it.
- Team folders:** A sub-item with an annotation "Access Your Team's Documents Here" pointing to it.
- Trash:** A sub-item at the bottom of the menu.

QualityNet Lucid

3 Different Roles

1. Licensed role: Licensed Lucid users are able to create and manage Lucidspark boards and Lucidchart diagrams. Be aware, though! Licensed roles are for Board Owners, Scrum Masters, Release Train Engineers, Product Owners, and Team Managers ONLY.
2. Limited Access role: Requires each user be registered with Lucid. Users can view Lucid boards shared with them through a shareable link with guest collaborator permissions from the host or owner. Only a maximum of 5 boards per year can be edited and you cannot utilize the Jira integration. So if it turns out you need a licensed role, then you can always make a new role request. View Lucidchart diagrams that are shared with Lucid Users at QualNet with a guest link.
3. Anonymous user: Anonymous users don't need to make any role requests. You only need to reach out to a Lucidspark Board owner to gain viewing access to the desired board. Anonymous users, however, cannot utilize the Jira integration and do not have access to LucidChart.

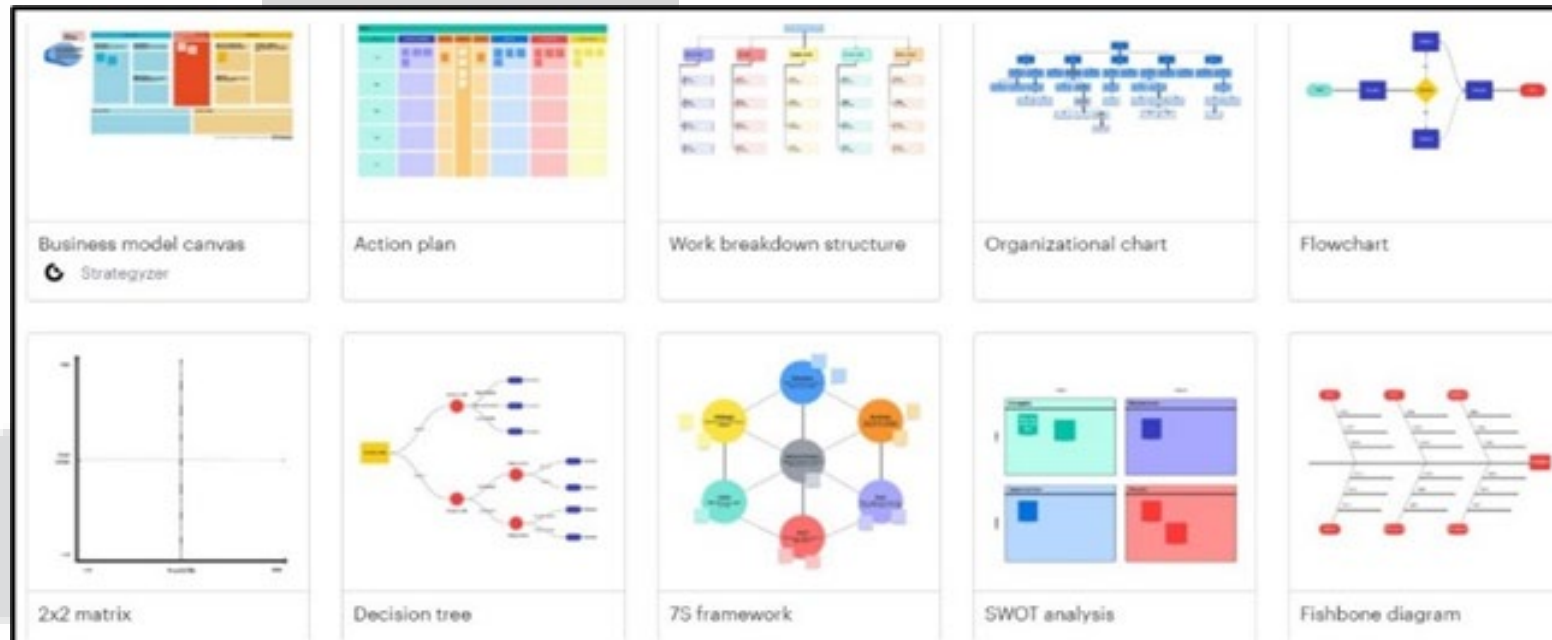
QualityNet Lucid

Lucidspark vs. Lucidchart

Lucidspark

Lucidspark is a virtual whiteboarding tool. With Lucidspark's intuitive canvas, your team can collect and organize ideas — then turn them into action.

Lucidspark makes it easy to create a canvas from scratch or from a template, customize it to your liking, collaborate with your team, and put your ideas to work.



QualityNet Lucid

Lucidspark vs. Lucidchart

Lucidspark Workspace

The image shows a screenshot of the Lucidspark workspace interface with several red annotations and arrows pointing to specific features:

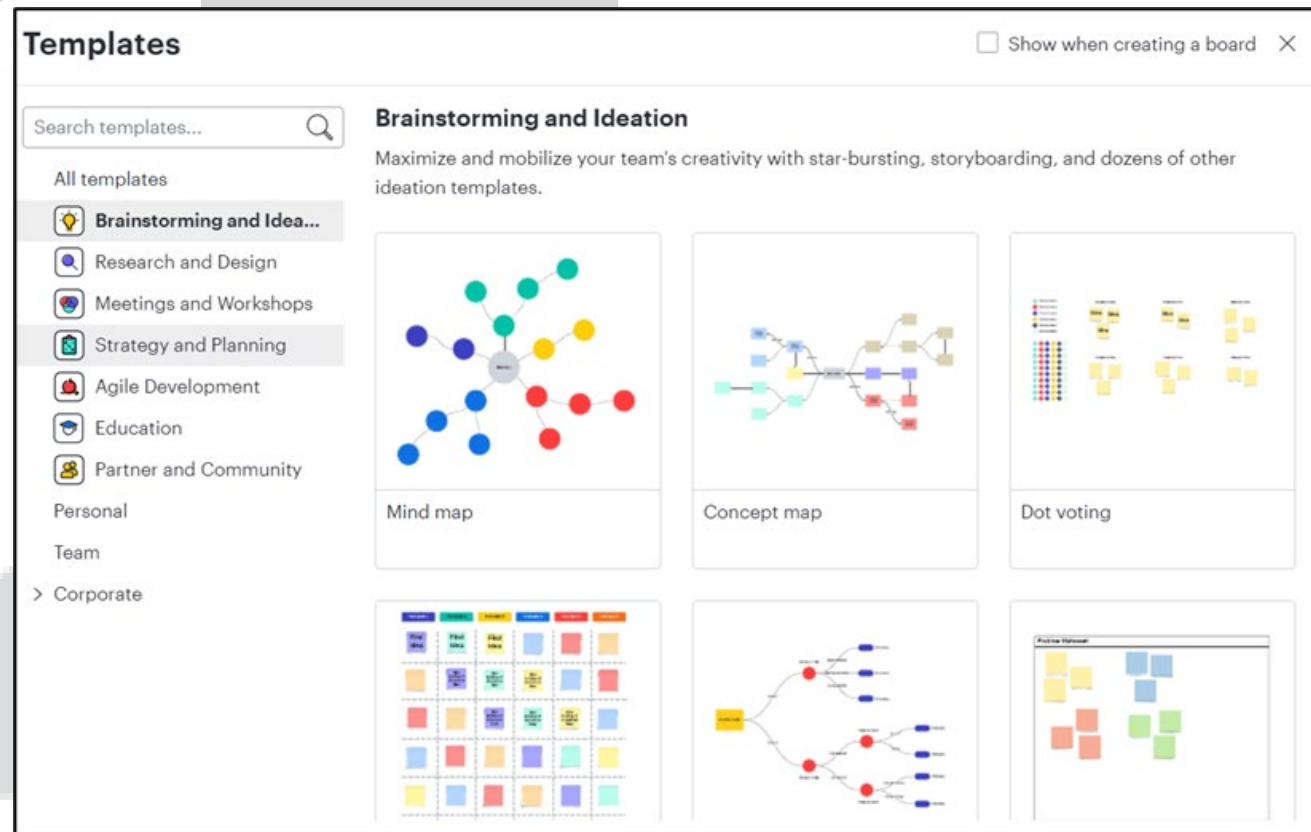
- Templates**: A red box highlights the 'Start, stop, continue retrospective activity' title at the top left.
- Visual Activities**: A red box highlights the 'Visual Activities' section in the left sidebar.
- Breakout Boards**: A red box highlights the 'Breakout Boards' section in the left sidebar.
- Import**: A red box highlights the 'Import' section in the left sidebar.
- Selection Tools**: A red box highlights the 'Selection Tools' section in the left sidebar.
- Text**: A red box highlights the 'Text' section in the left sidebar.
- Sticky Notes**: A red box highlights the 'Sticky Notes' section in the left sidebar.
- Shapes**: A red box highlights the 'Shapes' section in the left sidebar.
- Lines**: A red box highlights the 'Lines' section in the left sidebar.
- Organizers**: A red box highlights the 'Organizers' section in the left sidebar.
- Lucid Cards**: A red box highlights the 'Lucid Cards' section in the left sidebar.
- Images**: A red box highlights the 'Images' section in the left sidebar.
- Freehand Drawing**: A red box highlights the 'Freehand Drawing' section in the left sidebar.
- Collaborative AI**: A red box highlights the 'Collaborative AI' section in the left sidebar.
- Jira Integration**: A red box highlights the 'Jira Integration' section in the left sidebar.
- More Tools**: A red box highlights the 'More Tools' section in the left sidebar.
- More Menu Containing Different Tools**: A red box highlights the three-dot menu icon in the top right corner.
- Click to Rename**: A red box highlights the search icon in the top right corner.
- Search the Text Within Your Board**: A red box highlights the search input field in the top right corner.
- Select Mouse or Track Pad**: A red box highlights the 'Navigation mode' dropdown menu in the bottom right corner.
- Mini Map for Overview of Content & Access to Navigation Mode**: A red box highlights the mini map icon in the bottom right corner.
- Table of Contents to View All Frames & Breakout Boards in a List**: A red box highlights the table of contents icon in the bottom right corner.

QualityNet Lucid

Lucidspark vs. Lucidchart

Lucidchart

Lucidchart can help you visually communicate ideas, information, and processes. It is a form of Intelligent diagramming. It takes advantage of the fact that our brains process information through diagrams 50% faster than through text.



QualityNet Lucid

Lucidspark vs. Lucidchart

Lucidchart Workspace

The screenshot displays the Lucidchart workspace interface for a document titled "Sprint dashboard example". The interface is annotated with red arrows and labels pointing to various features:

- Formatting Toolbar:** Located at the top left, containing text formatting options like font face (Liberation Sans), size (8pt), bold, italic, underline, and text color.
- Template Gallery:** A panel on the left side showing various diagram templates.
- Shapes Panel:** A panel on the left side showing "Shapes In Use" and a "Create diagram key" button.
- Containers:** A panel on the left side showing different container shapes.
- Images:** A panel on the left side showing image upload options.
- Data:** A panel on the left side showing data integration options.
- Visual Activities:** A panel on the left side showing activity icons.
- Breakout Boards:** A panel on the left side showing breakout board icons.
- Collaborative AI:** A panel on the left side showing AI-related icons.
- Diagram as Code:** A panel on the left side showing code-related icons.
- Integrations:** A panel on the left side showing integration icons.
- Quick Tools:** A panel on the left side showing quick tool icons.
- Shape Options:** A toolbar at the top center for shape manipulation.
- Fill Color:** A toolbar at the top center for fill color selection.
- Line Color:** A toolbar at the top center for line color selection.
- Conditional Formatting:** A toolbar at the top center for conditional formatting options.
- Add Comments:** A button at the top right for adding comments.
- Presentation Builder:** A button at the top right for presentation mode.
- Record Video:** A button at the top right for recording a video.
- Custom Icons:** A toolbar at the top center for custom icons.
- Line Style:** A toolbar at the top center for line style selection.
- Shape Actions:** A toolbar at the top center for shape actions.
- Page Management:** A panel at the bottom left for managing pages.
- Formula Management:** A panel at the bottom right for managing formulas.
- Layers:** A panel at the bottom right for managing layers.

The main workspace area contains a dashboard with various charts and tables. The dashboard includes:

- Current sprint data:** Four donut charts showing "Tickets added to backlog", "Tickets to do", "Tickets in progress", and "Tickets completed".
- Resolving issue rating breakdown:** A horizontal bar chart showing "Fast", "Average", and "Slow" categories.
- Completed issue rating breakdown:** A horizontal bar chart showing "Fast", "Average", and "Slow" categories.
- Ticket breakdown table:** A table with columns for "Team", "Hard", "Avg", "Easy", and "Backlog".
- Previous sprints data:** Three charts showing "1 sprint ago", "2 sprints ago", and "3 sprints ago" with "Completed tickets breakdown" and "Total tickets" metrics.

QualityNet Lucid

Lucidchart Tips

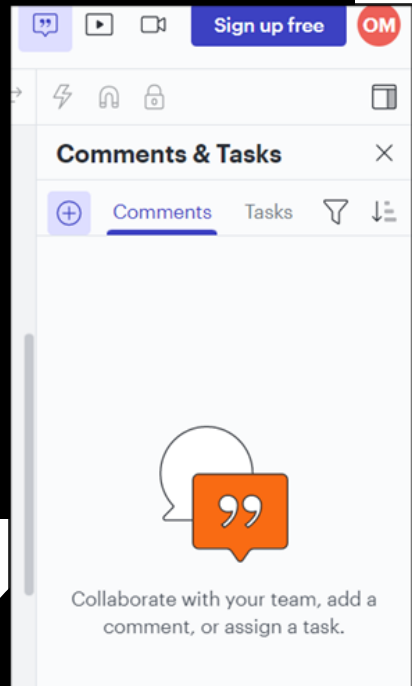
- Easy to use diagramming tools.
- Create documents and access unique shape libraries.
- Import documents from other platforms (e.g. Visio, Omnigraffle, etc).
- Build your first flowchart and add style to the shapes & lines.
- Share your work, collaborate on diagrams in real-time, and export your documents.
- Integrate Lucidchart with other applications for maximum efficiency.
- Double-click to add flowchart shapes and text.
 - Different shapes have different purposes. For instance, when arrows are pulled out from each side of the diamond shape, one arrow says yes, the other says no.



QualityNet Lucid

Lucidchart Tips

- Share diagrams through the **Share button** in the top right corner.
 - Good practice is to copy the diagram link and share in an invite prior to meetings so attendees can review ahead of time.
- Video record presentations of chart documents.
 - Click on **Camera icon** in the upper right.
- All collaborators can add comments and feedback at any time.
 - Click on the speech bubble top margin. Then click the **+** sign in the contextual tab that opened left of the word **Comments**.
- **Email notifications are not enabled in Lucid.** Documents should be shared via link or the Slack integration. Notifications can be accessed using the bell icon at the top right-hand corner.



QualityNet Lucid

Lucid Integrations

QualityNet Jira Integration

The Lucid Cards for Jira integration allow customers to easily import Jira issues into Lucidspark and refresh your Cards to reflect any changes made in Jira.

- Cards are bidirectionally synced with Jira in real-time.
- Edits made in Lucidspark are pushed back to Jira and edits in Jira are pulled into Lucidspark.
- Only Licensed Users can utilize the Jira Integration.

QualityNet Lucid

Lucid Integrations

QualityNet Slack Integration

Get and send notifications between Lucid and Slack. The QualityNet Slack integration with Lucid offers a quick and easy way to keep track of Lucid document updates!

QualityNet Lucid has the ability to send you Direct Messages (DMs) notifying of Lucid document changes.

QualityNet Lucid

Lucid Integrations

QualityNet Confluence Integration

Enrich your Confluence spaces with visuals and improve collaboration by attaching Lucidchart documents and Lucidspark boards!

When using the Lucid-Confluence integration you can expect:

- Lucid documents and boards to update automatically on all Confluence pages they've been inserted.
- Team members able to view and edit documents and boards directly in Confluence.

QualityNet Lucid

Resources

Helpful information and support can be found at:

- The QualityNet Lucid Confluence space, <https://qnetconfluence.cms.gov/display/HS/QualityNet+Lucid>, providing videos, documents trainings, integrations and more.
- Training
 - Live training, videos, additional resources
 - Lucid Training Labs - numerous video tutorials for Lucidspark and Lucidchart