

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



Visit ESS Tools 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/HS/ESS+TOOLS+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 magnifying glass icon. An annotation "Search by Keyword" points to the search icon.
- Navigation:** A top right navigation bar containing a help icon (circled in red), a notifications bell icon (circled in red), the text "Enterprise plan", and an "EP" account icon (circled in red). Annotations include "Notifications" pointing to the bell icon, "Education & Support Center" pointing to the help icon, and "Account Settings/Logout" pointing to the "EP" icon.
- Left Sidebar:** A vertical sidebar with icons for home, user profile, and a plus sign. A "Documents Dropdown Menu" is shown below, listing "Documents", "My documents", "Team folders", and "Trash". Annotations include "Documents Dropdown Menu" pointing to the sidebar, "All Documents & Folders You Create & Own" pointing to "My documents", and "Access Your Team's Documents Here" pointing to "Team folders".
- Main Content:**
 - + New:** A blue button to create new documents, annotated with "Create New Document, Board, or Team".
 - Recent:** A section for "Recent Documents".
 - Starred:** A section for "Starred Items".
 - Documents:** A section for "Your Documents".
 - Shared with me:** A section for documents shared with the user.
 - Discover:** A section for "Browse & Open Predeveloped Documents/Boards", including "Templates", "Integrations", and "Admin".
 - Suggested templates:** A row of template cards: "UML class", "Use case diagram", "Gantt chart", "Mind map", and "Roadmap".
 - Recent documents:** A row of recent document cards: "What went well retrospective activity", "Blank board", "Sprint dashboard example", "PI-4 Retrospective", and "ESS Tools Roadmap".

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.

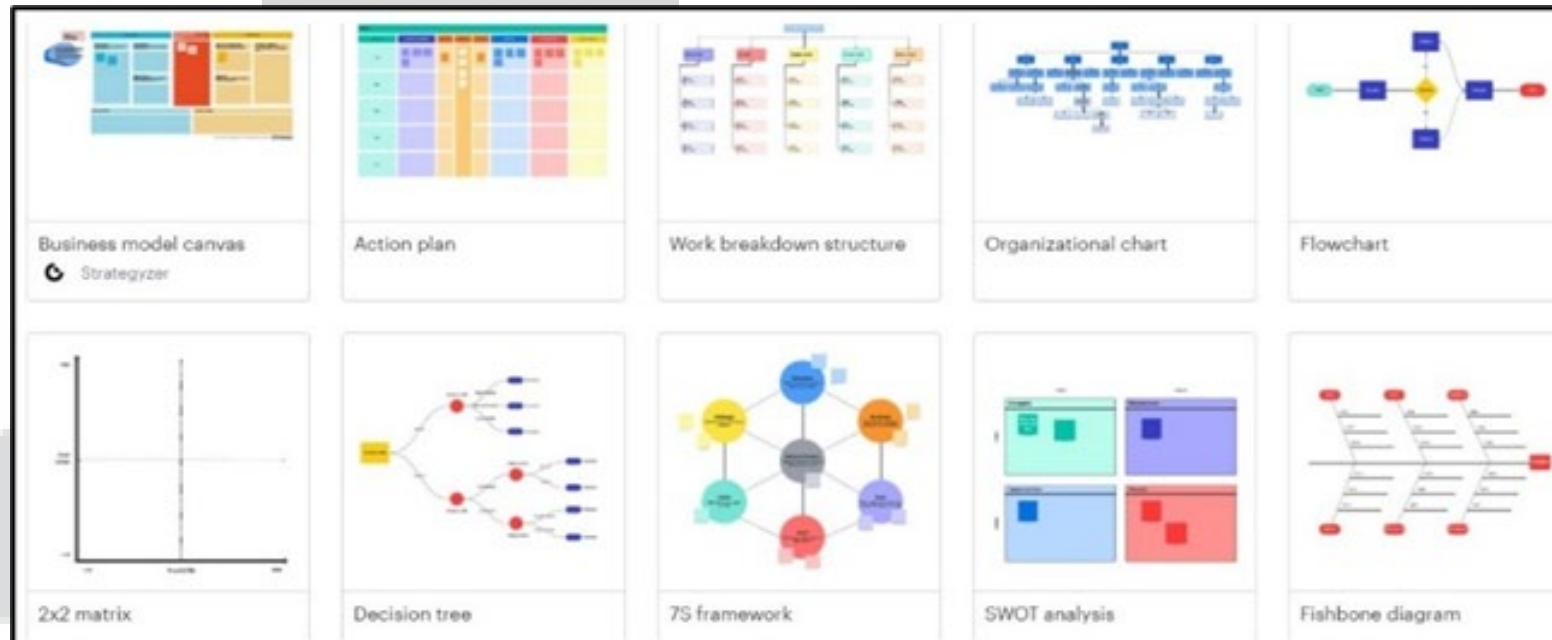
QualityNet Lucid

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:

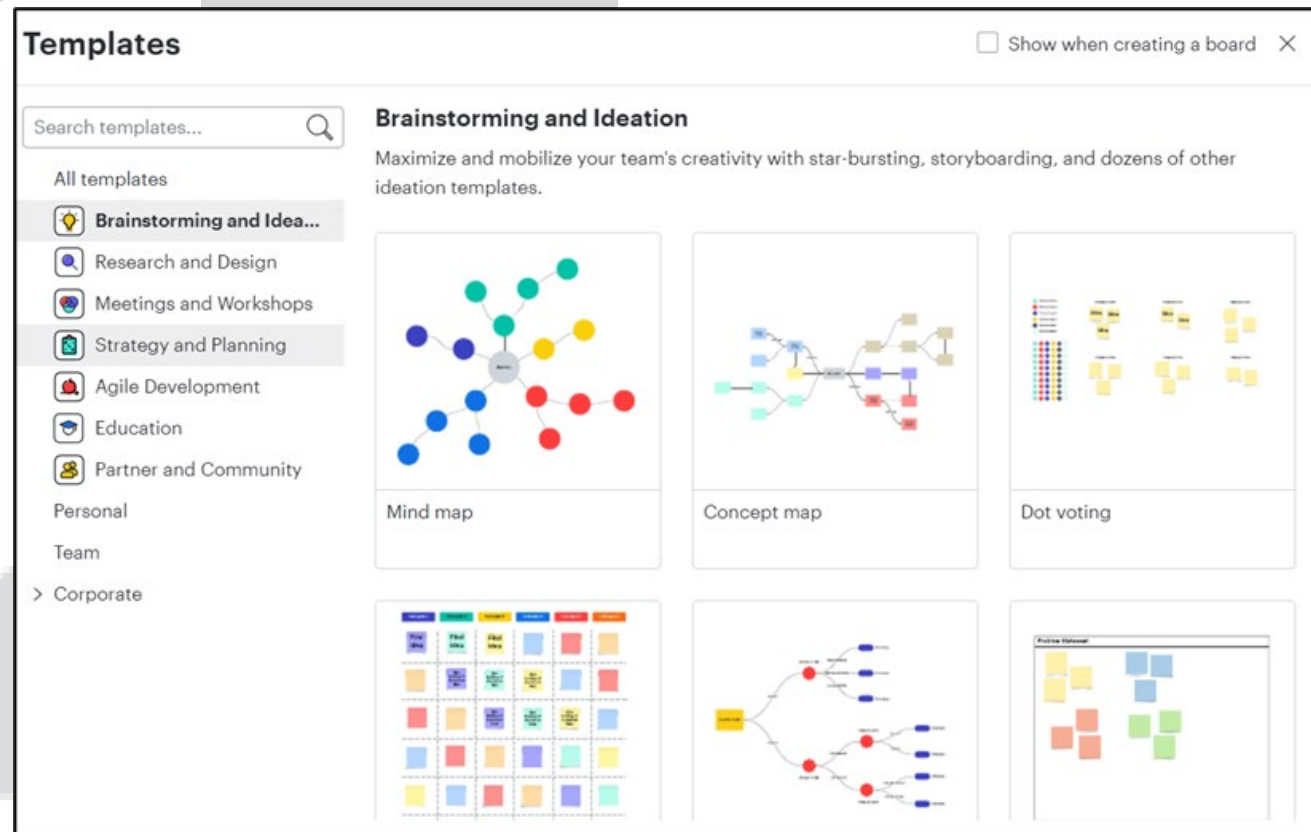
- Templates**: A red box highlights the 'Start, stop, continue retrospective activity' title in the top toolbar.
- Visual Activities**: A red box highlights the search icon in the top toolbar.
- Breakout Boards**: A red box highlights the 'More Menu' icon in the top toolbar.
- Import**: A red box highlights the 'Click to Rename' text in the top toolbar.
- Selection Tools**: A red box highlights the 'Search the Text Within Your Board' text in the top toolbar.
- Text**: A red box highlights the 'Start' button in the center of the workspace.
- Sticky Notes**: A red box highlights the 'Mini Map for Overview of Content & Access to Navigation Mode' text in the bottom right.
- Shapes**: A red box highlights the 'Table of Contents to View All Frames & Breakout Boards in a List' text in the bottom right.
- Lines**: A red box highlights the 'Navigation mode' text in the bottom right.
- Organizers**: A red box highlights the 'Select Mouse or Track Pad' text in the bottom right.
- Lucid Cards**: A red box highlights the 'Mouse', 'Trackpad', and 'Auto' options in the bottom right.
- Images**: A red box highlights the 'Delve with two fingers to pan' and 'Pinch with two fingers to zoom' text in the bottom right.
- Freehand Drawing**: A red box highlights the 'Cancel' and 'Save' buttons in the bottom right.
- Collaborative AI**: A red box highlights the 'View results' button in the bottom right.
- Jira Integration**: A red box highlights the '26%' zoom level in the bottom right.
- More Tools**: A red box highlights the 'Table of Contents' icon in the bottom right.

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 vertical sidebar on the left containing icons for shapes, styles, containers, images, data, visual activities, breakout boards, collaborative AI, diagram as code, integrations, and quick tools.
- Shapes Panel:** A panel on the left showing "Shapes In Use" and a "Standard" library of shapes.
- Shape Options:** A toolbar at the top center for editing shapes, including fill color, line color, and line style.
- Fill Color:** A specific option in the shape options toolbar for changing the fill color.
- Line Color:** A specific option in the shape options toolbar for changing the line color.
- Line Style:** A specific option in the shape options toolbar for changing the line style.
- Conditional Formatting:** A specific option in the shape options toolbar for applying conditional formatting.
- Custom Icons:** A specific option in the shape options toolbar for adding custom icons.
- Shape Actions:** A specific option in the shape options toolbar for performing actions on shapes.
- Add Comments:** A button in the top right for adding comments to the document.
- Presentation Builder:** A button in the top right for creating a presentation from the document.
- Record Video:** A button in the top right for recording a video of the document.
- Page Management:** A panel at the bottom left for managing pages, showing the current page "Sprint dashboard ...".
- Formula Management:** A panel at the bottom right for managing formulas, showing "Selected objects".
- Layers:** A panel at the bottom right for managing layers, showing a stack of layers.

The main workspace area contains a dashboard with various charts and tables, including "Current sprint data" and "Previous sprints data".

	Hard	Avg	Easy	Backlog
Team 1	15	12	45	32
Team 2	18	14	38	35
Team 3	45	32	18	38
Team 4	42	35	15	35
Team 5	48	38	22	38
Team 6	38	35	22	42

Sprint	Hard	Average	Easy
1 sprint ago	412	234	58
2 sprints ago	324	227	235
3 sprints ago	388	276	276

QualityNet Lucid

Lucidchart Tips

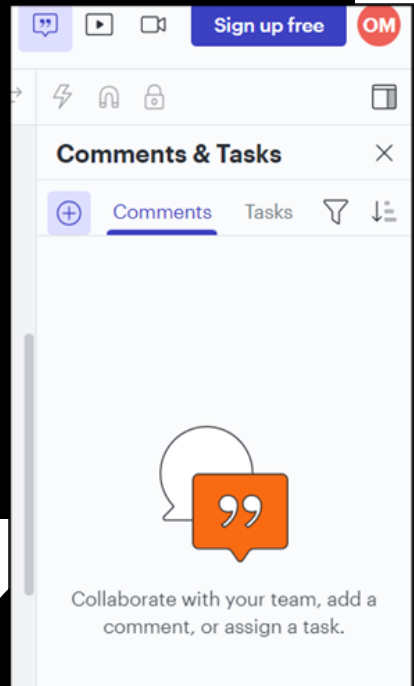
- Easy to use diagramming tools.
- Create documents and access unique shape libraries.
- Import documents from other platforms (e.g. Visio, Omnigraffle, etc).
- Build your first flowchart and add style to the shapes & lines.
- Share your work, collaborate on diagrams in real-time, and export your documents.
- 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