QualityNet Lucid

QualityNet | Lucid

QualityNet Lucid Suite is a toolset that enables users to plan and visualize collectively and virtually. Lucidspark and Lucidchart are available to CMS, CMS contractors, and CMS stakeholders.

- ○ Facilitate effective meetings, planning sessions, and workshops with the right balance of structure and flexibility.
- ○ Ideate in real time with teammates.
- ○ Provide feedback, organize, and vote on your team's ideas, and create action items.

- **Lucidchart** is a web-based collaborative diagramming application that allows you to create and share technical diagrams. It also allows you to import files from other tools and platforms, such as Visio, Gliffy, Draw,io and more.
- **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.

Lucid Training Classes

Access on demand QualityNet Lucid trainings and resources at ESS Tools University.   Find additional learning tools under the Lucid Resources tab.

Getting Started

Integrations

Lucidspark with Jira

Customers can accomplish moving from brainstorming and ideation to big room planning, roadmapping, sprint planning, basic dependency mapping, and backlog refinement. 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.

Resources

Recorded Live Trainings

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CMS _ Getting Started with Lucidspark - May 9, 2023.mp4

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CMS_AgileVisualizationinLucidspark_May162023.mp4

Your browser does not support the HTML5 video element

CMS_DesigningEffectiveMeetingsWorkshopsinLucidspark.mp4

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CMS _ Getting Started with Lucidchart-May312023

How To's

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Lucidspark for Facilitators.mp4

Your browser does not support the HTML5 video element

Sharing your Board in Lucidspark.mp4

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Lucidspark for Collaborators.mp4

FAQs

Lucidspark is a virtual whiteboard where teams connect and convey their greatest ideas to light. The goal is to allow teams to brainstorm and share their ideas through teamwork and better organization. Lucidchart is a virtual diagramming application where teams work together to make and build better decisions. Whatever your objective, Lucidchart allows you to envision ideas more clearly, faster, and through teamwork.

Working in Lucidspark

Not at this time, Lucid is looking into this as a future enhancement.
To create a new Breakout Board:

1. Select blocked URL the Breakout Board icon from the Primary Toolbar.
2. Click the tile to "Add new breakout".

A Breakout Board will be automatically labeled. To rename a board, join the board you'd like to update and type the new title in the upper left-hand corner.
To start the breakout session, select **Start Breakout**. The Breakout Boards panel will become visible to all participants, and they'll be able to select a board to join, which will send them to a separate Lucidspark board.

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You can also share a direct link to a Breakout Board. You can do this by selecting **Copy direct link** from the three-dot menu in the Breakout Board panel and from within a Breakout Board by selecting blocked URL in the upper-right corner.

Note: Shareable Links will need to be enabled from the Main Board's Share settings to allow creation of and access to direct links.

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When the session is over, select **Call Back** to bring everyone back to the Main Board. Participants can also navigate back to the main board themselves at any time by clicking blocked URL in the upper-left side corner.

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Lucidspark keeps a log of all changes made to a board using the Revision History tool! It's accessible within the menu near the title of your board.

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The board's edit history will display as a list of stacked tiles, with each tile representing a past version of the board. Each tile will display the date and time the changes were made, as well as the full name or email address of the user who made the changes.

Add a Note to a Shape

To add a note to a shape, right click on the shape and select "Add Note" from the dropdown.

Note Icon on Shape

After adding a note to a shape, you will see blocked URL the note icon on the top right corner of the shape. If you click on the note icon, it will show the note you added.

Delete a Note from a Shape

To delete a note from a shape, right click on the shape and select "Delete Note" from the dropdown.

1. Select blocked URL the Breakout Board icon from the Primary Toolbar.
2. Hover your cursor over the board you'd like to join.
3. Click **Join**.
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4. Select blocked URL in the upper left-hand corner of your canvas when you're ready.

You can also join a Breakout Board by clicking a direct link the facilitator or another participant has shared with you.
You have multiple options when managing Breakout Boards. To access this menu, hover over a board's tile and select the three-dot menu.

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With this menu you can:

- **Join** a board to participate
- **Rename** a board to customize its title
- **Copy direct link** to share with participants
- **Duplicate** a board
- **Insert** all content of a Breakout Board to the Main Board
- **Delete** a board

A few tips

- Anyone on your Enterprise account with edit permissions to a board can create Breakout Boards.
- View-only users can join and view Breakout Boards.
- Guest Collaborators and free users can participate in existing Breakout Boards.
- Participants will only see collaborators for the Breakout Board they are in.
- You can move over specific shapes from the Breakout Board to the main board.
    - To add a single shape, copy the shape and paste it in the Main Board.
    - To select multiple shapes, hold the Shift key while selecting shapes to copy, then paste in the Main Board.
- You can also add all content of a Breakout Board to the Main Board by dragging and dropping the thumbnail of a board from the Breakout Board panel onto the canvas.

To add a web link to an object:

1. Select a shape.
2. Click the link icon from the Context Toolbar.
3. Paste the URL and click **Apply.**
4. To change the shape to display a preview of the linked content, select **Convert to Link Preview**.

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Link Preview

If you convert to Link Preview, a separate shape containing a thumbnail will be populated. You may see the following options in the Context Toolbar for the thumbnail:

- **blocked URLRefresh** the thumbnail image(s)
- **blocked URLblocked URLNavigate thumbnails** will appear as arrows that will allow you to switch between the images, if there are more than one
- **blocked URLExtract thumbnails** to extract the thumbnail image(s)
- **blocked URLExpand view** if there is an iframe to display

Add a Web Link to text

To add a web link to specific text (whether in a text box or on an object), highlight the portion of the text that you would like linked and then follow the steps explained above — select the link icon from the Context Toolbar, paste in the URL, and hit "Apply."

A blue line will appear under the selected text to indicate that a web link has been applied.

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Trigger the Link

To trigger the link and open the linked webpage on a PC, press Shift + Ctrl and then click on the object or text that you applied a web link to. If you are using a Mac, press Shift + Command and then click on the object or text.

These instructions will also appear on your board if you hover over/click on an object that has a web link attached to it.

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- Choose the Line option from the Primary Toolbar or press "L" on your keyboard, then click and drag your cursor across the canvas.
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  - To attach a line to a shape, you can:
    Select the shape, click on the arrow in the upper right corner, position the line by moving your cursor across the canvas, and single click to attach it to the canvas or to another shape.
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    Move an independent line close to a shape, where it will automatically attach to the shape's border.
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All formatting tools for lines are available in the **Formatting Toolbar** when a line is selected.

- Shape: Lucidspark offers three options for line shape - straight, curved, or elbow, which are available in the Shape dropdown menu. By default, new lines will have the curved shape.
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  Additionally, you can add more joints to elbow lines by clicking and dragging the solid blue dots along the line path. For curved lines, you can alter the depth and shape of the curve using the handlebars located at joints and arrowheads.
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- Color: Simply choose a color from the color palette to apply it to your line. To choose a custom color, select blocked URLthe plus icon and use the slider and cursor to customize a color.
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- Width: The thickness of a line can be adjusted by choosing the pixel size from the Width dropdown menu.
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- Style: Make a line path solid or dashed by choosing a style option from the Style dropdown menu.
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- Arrows: Choose from a variety of arrowheads for one or both ends of your line using the Arrow dropdown menu.
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Working in Lucidchart

To import a data set from Google Sheet, Excel, or CSV into a Lucidchart document, follow these steps:

1. Open a Lucidchart document.
2. Click blocked URL the data linking icon in the left bar.
3. Click **Link Data.**
4. In the window that appears, click **Import Your Data**.
5. Select the file type (Google Sheets, Excel, or CSV) that you would like to import, or select to choose a file that you have already uploaded to Lucidchart.
6. Click **Choose File**.
   - If you are importing data from a Google Sheet, you will need to grant Lucidchart permission to access your Google account. Click **Authenticate**, select your Google account, and click **Allow** to grant this permission.
7. Select an Excel or CSV file from your device and click **Open.**
   - If you are importing data from a Google Sheet, select a sheet and click **Select**.
8. Select which pages of your spreadsheet you want to import and click **Next**.
9. After importing your data, Lucidchart will prompt you to identify the header row of your data set. Select your header row.
10. Click **Next**.
11. In the next window, Lucidchart will prompt you to select a column of your data that contains reference keys for the contents of each row. Reference keys allow Lucidchart to keep track of your data even after you make structural changes to it, such as removing, adding, or reordering rows. Select the column that contains unique identifiers, if you have one.
12. Click **Finish**.

Select Where to Attach Image on Editor

Select the Shape, Line, Page, etc. that you wish to attach an image to. Your image with be attached to whatever you have selected, be it a page or a shape.

Locate the Attach Images feature

The Attached Images feature can be found in the menu on the right-hand side of the editor.

Click on blocked URLthe menu icon to open up the options and upload Attached Images.

Upload images into the Attach Images section

You can attach images via the (+) icon, by clicking 'Choose a file', or by dragging & dropping a file into the Attach Images section.

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Supported file types are: .bmp, .gif, .jpeg, .jpg, .png, .jpe, .tiff, .tif, .psd, .ai, .pdf, and .svg

Note: Since PDFs will be attached as an image, only the first page of the PDF will be attached.

Attach Image Icon on Shapes

If you attach an image to a shape, you will see blocked URL the image icon on the right upper corner of the shape.
You can add shape libraries to your document by selecting the boxes next to shape libraries in the Shapes section of the Workspace Manager. Click the triangle next to a library's name to expand a list of its sub-libraries.
No. Freehand drawing is supported in another Lucid product - Lucidspark! For more information, please visit our Lucidspark Help Center or view this Freehand Drawing article.
Right-click and drag the canvas to adjust your view. When you hold down the right-click, your cursor becomes a hand grabbing the canvas as you move the document to see other content.
To access Revision History, select blocked URL the clock icon from the menu bar at the top of your document. Alternatively, select **Revision History** from the File menu.

The document's edit history will display as a list of stacked tiles, with each tile representing a past version of the document. Each tile will display the date and time the changes were made, as well as the full name of the user who made the changes.

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Note: The times will correspond with the time zone of the current document viewer.

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Scroll to the bottom of the menu to see how long ago the document was created.

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There are four tiers of sharing permissions that you can choose from when sharing folders, documents, boards, and models:

- Can edit and share
- Can edit
- Can comment
- Can view

You can set different permissions for each collaborator and adjust them any time.

To adjust permissions, follow these steps:

1. Navigate to **Share**, as described in the sections above.
2. Select **Manage** in the Collaborators section.
3. Click the sharing permissions icon for the user you would like to adjust the sharing permissions for.
4. Select the desired permission option from the dropdown.

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Note: If a collaborator is on a lower-level account type than you, they may not be able to edit the shared document, boards, and models even if you have given them edit access.

You can transfer ownership of documents and boards from both the Documents page and from within the editor.

To transfer ownership, follow these steps:

1. Navigate to **Share** from your Documents page or from within the editor of the document you wish to transfer ownership of, as described in the sections above.
2. Select **Manage** in the Collaborators section.
3. Click the sharing permissions icon for the person you would like to transfer ownership to.
4. Select **Make owner**.
5. In the confirmation window that appears, select whether or not you would like to remain as a collaborator.
6. Click **Make owner**.

The new owner will receive a notification that they are now the owner of the document or board.
To unshare, open the document, board, or model. Then, click **Share** again, select **Manage** in the Collaborators section, and then click "X" to remove the collaborator. You can also adjust your collaborator's editing permissions here.
No. When you delete a swim lane, its contents will remain on the canvas. To do this, right-click the swim lane header and select **Delete** (or select the swim lane and press Delete on your keyboard). If you want to erase both the swim lane and its contents, click **Remove Lane** in the right-click menu.

Working with Lucid Cards in Jira

Currently templates for big room planning, user story mapping, backlog prioritization, retrospectives, roadmapping, and more.

You can also copy and paste any template from Lucidchart directly into Lucidspark.
You can access your custom fields from Jira on your Lucidspark cards and choose which custom fields are brought in. You will have view-only access to your custom fields.
Yes, the card will copy, but the data will not copy. It's better to re-import the Cards on a new document.
No, Lucidspark only supports data from one Jira instance per document.