

Connect Module 1: Creating a Connection Manually (Part 2)

Add Data Elements to a Connection (Topic 1)

We will first discuss how to add data elements to a Connection in the CEDS Connect Tool.

Now that you have named and categorized your Connection, you will use the *Data Elements* section to choose the CEDS elements necessary for the question or metric you are detailing. Elements can be organized under *Data Labels* of your choosing; for example, you might choose to group elements as Identifying Elements and Reporting Elements. Or you might group elements based on some other criteria. The way you group elements is your choice; you should group them in the way that makes the most sense for you and for the topic you are detailing. To add a label to your grouping, click *Add Data Label* and fill in the field with the label's name. You may add as many data labels as you like. Each *Data Label* must contain at least one element. To remove a data label, just click the *Remove* button and confirm the removal by selecting *OK*. Removing a data label will also remove all elements associated with it. If you want to re-order the data element groupings, save the Connection, then click "Move Up a Section" or "Move Down a Section" as appropriate.

Now that you have added *Data Labels*, the next step is to add elements to each grouping. To add CEDS elements, select the button labeled *Choose CEDS Elements*. The CEDS Domain Entity Schema appears. You can filter by domain and search for an element using keywords in the *Search* field. Or you can expand the folders to narrow in on a particular CEDS element you would like to add. To see more information on a CEDS element, simply click the element's name. The *Element Details* window appears, listing the element's definition, format, option set, and other information. Click *Close* to return to the Domain Entity Schema. To add elements, check the box to the left of each element's name. When you are finished selecting elements, click *Save & Close* at the top of the window. You now see the CEDS elements associated with that grouping.

If you need an element for this Connection which cannot be found in CEDS, click the button labeled *Define Elements Not in CEDS*. Complete as many fields as possible about the element, though *Element Name* is the only mandatory field. Use the *Element Definition* field to provide the definition; use the *Data Type* field to specify what kind of data this element collects (for example, numeric or date); use the *Length* field to note the length allowed for this element. Finally, if the element contains an option set or valid values, list them in the table. When you have entered all the information for the element, click *Save & Close*. You now see the element you added associated with that grouping. If you would like to edit that element's information, click the pencil and paper icon to do so. To remove an element from a data label, click the red X to the right of the element name and confirm by selecting *OK*.

Adding Analysis Recommendations and Related Connections (Topic 2)

This section explains how to add analysis recommendations and related Connections to your Connection.

After you have finished adding elements in the *Data Elements* section, scroll down to *Analysis Recommendations*. In this part of the Connection, you can add business rules or additional guidance to explain nuances of how you report the data. To add information, click *Add a Subsection*. Give the subsection a header by completing the field called *Subsection Label*. For ideas about analysis recommendations you might include, click the button labeled *Show Suggestions*. If you want to include one of the suggested analysis recommendations, select the radio button next to the suggestion you like, and click *Select*. The *Subsection Label* field is now populated with the suggested *Analysis Recommendation* title.

Next, enter your desired recommendations in the text field below the subsection label. You can use the editing toolbar above the text field to format the text. The drop-down menus above the editing toolbar offer more options for changing your text. Words that are misspelled are flagged with a red underline. Right click on the word to review spelling suggestions. To insert additional subsections, click on *Add a Subsection*. If you want to rearrange the order of your subsections, save the Connection, then click “Move Up a Section” or “Move Down a Section” as appropriate.

Below “*Analysis Recommendations*” is the *Related Connections* section. If the Connection you are creating is closely related to one or more shared CEDS Connections, you can use this feature to link them. Use the purple drop-down menu to select specific categories. After you have selected the desired categories, click on the search icon. A list of related descriptors will appear. Click on a descriptor to see any Connections tagged with that descriptor. Scroll down and place a check mark next to the desired Connections. You can always add more or remove any related Connections later.

Add References and Comments to a Connection (Topic 4)

We will now discuss how to add references and comments to a Connection.

In the *Related References* area, you can add links to supporting documentation or source material for your Connection. For example, you might add a link to a published report or business rules document that is directly relevant to your Connection. To do this, simply click *Add a Reference*. Specify the reference’s title, source, and link using the provided fields, and select *Save & Close*. Your reference is now displayed. To edit a reference, select the pencil and paper icon to its right; to delete a reference, click on the red X next to it and confirm the removal by selecting *OK*.

The final part of the Connection is the *Author’s Comments/Additional Information* field. Use this section to add any supplementary information that you wish. You might, for example, want to make a general comment that did not fit logically into the *Analysis Recommendations* above.

When you have completed all desired components of your Connection, click *Save* to save your work. It is best to save your work frequently while building a Connection; you do not need to complete the entire Connection before saving. If you save the Connection, you can return later to resume your work.

This completes Part 2 of *Connect Module 1 – Creating a Connection Manually*. You now understand how to create and build a CEDS Connection. For more information on how to manage Connections, share Connections, or explore the other dynamic capabilities of the Connect Tool, please view the other Connect tutorials available on the CEDS website, or contact us for a demonstration.