Connect Module 3: Managing a Connection

This tutorial explains how to manage a CEDS Connection. Once you have created a Connection, you can assign additional users, edit the Connection, or share it with others, among other actions. Note that you will not be able to manage a Connection until you have created and saved one. To learn how to create Connections, view Connect Module 1: Creating a Connection Manually or Connect Module 2: Creating a Connection Using the Excel Template.

Access your Connections and the Manage Connection Page (Topic 1)

To manage a Connection, you will need to be logged into the CEDS website. To see how to log in to the website, view the *Getting Started with the CEDS Tools* tutorial.

First, visit the Connect main menu by selecting *Tools> Connect* from the green menu bar at the top of the page. Then, under the “Build” column click *MANAGE Connections*. You will now see a list of any Connections you have created or to which you are assigned. Click on a Connection to access the *Manage Connection* screen for that particular Connection. For the purposes of this tutorial we will use the sample connection created in Module 2 of this tutorial series.

In the center of the *Manage Connection* screen, you will see key information about the Connection, including its name, whether it is shared or private, whether it is archived, the date it was created, and the date it was last modified. You will also see a table listing the users assigned to this Connection. The person who created the Connection is automatically designated the *Connection Administrator*, though this can be changed later.

The green menu on the left side of the page is where you can perform various administrative actions to the Connection.

Manage User Access (Topic 2)

We will begin with the *Manage User Access* function. This is where you can assign additional users to the Connection, granting them varying roles depending on the amount of control you want them to have.

To begin, click *Manage User Access*. You are taken to the user access screen for the Connection. You will see a table displaying all users currently assigned to the Connection. You can use the drop-down menu in the *Change Role* column to assign a new role to a user.

There are three different roles for a Connect user: *Connection Administrator, Authorized User,* and *Restricted User.* To see descriptions of the user roles, click on the user roles table.

- *Connection Administrators* have complete control over a Connection and can edit it, delete it, manage user access, and share the Connection.
- *Authorized Users* can also manage user access and edit the Connection, but they cannot archive or share it.
- *Restricted Users* can view the Connection but cannot edit it, manage user access, or share it. In other words, they have read-only access to the Connection.

The actual data owner or manager is typically the Connection Administrator. If you have a colleague who will be helping to build the Connection, you might assign that person as an Authorized User. If you would like to show a vendor your Connection without granting access to change or share anything, you could assign the vendor as a Restricted User. These are just some suggestions; ultimately, how you assign user roles is your decision.

To delete a user from the Connection, click on the red X on the row for that user under the *Remove* column. To add a user to the Connection, enter his or her email address in the *Add User* field. Then click *Search.* If the user already has a CEDS user account, his or her name is displayed on the screen. Click the check box next to the user's name and select the user's role by choosing the appropriate radio button. Then click *Add*. The user is added to the Connection in the role you specified.

If you try to add someone who does not already have a CEDS account, a dialog box appears asking if you would like to invite the individual to join. If you select OK, you will need to supply the person's full name, e-mail address, and user role for this Connection. Click *Send Invitation*. The CEDS system will invite the person to create an account by sending an e-mail to them. When the person completes the registration process, the user will be assigned to this Connection in the role you specified.

Use the breadcrumb links in the top left of the page to return to the *Manage Connection* screen.

Modify Connection and View Shared Version (Topic 3)

The *Modify Connection* button in the green menu on the left of the *Manage Connection* screen allows you to edit the Connection. All the fields of the Connection are editable and have the same functionality as when you originally built the Connection in the tool. For example, you can add or delete data elements, re-name the Connection, or add analysis recommendations. To learn how to edit or complete the various parts of the Connection, view *Connect Module 1—Creating a Connection Manually*. If you do not wish to make changes, click *Cancel* to return to the *Manage Connection* screen. If you do make changes, click *Save* when finished. You are then returned to the *Manage Connection* screen.

From the *Manage Connection* screen, you can also preview what the Connection will look like when shared. Simply click *Using the Connection* in the green menu on the left side, then select *View Shared Version*. A preview of the shared Connection is displayed. This is to show you what the Connection will look like when you share it. Click *Expand All* to view all the parts of the Connection. You can return to the *Manage Connection* screen by selecting the *Options* menu at the top of the screen, and then choosing *Manage Connection.*

Share Connection with Some Users (Topic 4)

This topic will cover how to Share a Connection with Some Users.

Sharing a Connection with Some Users allows you to provide access to your Connection with individuals of your choosing. To share a Connection with some users, select *Using the Connection*, then *Share Connection*, then *<u>Share Connection with Some Users</u>*. When you select this option, a dialog box appears asking you to confirm that you are authorized to share the Connection. When you select *Share,* a dialogue box will display confirming that your Connection will be reviewed by a CEDS Administrator prior to sharing. The CEDS Administrator will subsequently share the Connection or contact you regarding any issues that prevent sharing.

After you have selected *Share* on the dialogue box, the Share Connection with Some Users page will open. Select the users with whom you want to share your Connection. You can share your Connection with several users at a time from this page.

To add a user, enter the email address of the user into the *Add User* field and select the green *Search* bar. If the email you entered belongs to a registered CEDS user, their name and email address will display in the purple bar below the search field. If the email address you selected does not belong to a registered user, a dialogue box will display giving you the option of inviting the person to join CEDS. Select OK to send an invitation to the user, or select Cancel to search for others.

Select the checkbox to the left of the user's name, then select the green Add button at the top right corner of the page. The user's name now appears in the purple dialogue box. When the first person has been added, the release status of your Connection will change to Submitted for Review. When the CEDS Administrator has approved the Connection, the release status will change to Shared with Some Users.

To stop sharing the Connection with a particular user, select the red *X* in the table in the Remove column and select OK in the dialogue box that appears. When all users have been removed, the Connection is no longer shared with anyone and the release status will change to Not Shared.

Share Connection With All (Topic 5)

Until your Connection is shared with all, only Connection Administrators, Authorized Users, Restricted Users, and those whom you have shared your Connection with individually can see your Connection. When your Connection is shared with all, your peers and others with whom you might be interested in working will be able to view your Connection.

In the green menu under *Using the Connection*, you will see *Share Connection,* then *Share Connection With All*. When you select *Share Connection With All,* two dialogue boxes will appear*, one* asking you to agree that you are authorized to share this Connection, and another requesting confirmation that you want to share the Connection. When you click *Share Connection with All*, your Connection will be reviewed by a CEDS Administrator prior to sharing. The CEDS Administrator will subsequently share the Connection or contact you regarding any issues that prevent sharing. If you want to retract the request to share your Connection before it has been reviewed by the CEDS Administrator, you can select *Retract Request to Share With All Users*.

Once your Connection has been shared, it will appear in the *Use* section of the Connect Tool and will be available for you and other users. If, at any time, you need to stop sharing your Connection, go to the Manage Connection screen, select your Connection, select *Using the Connection* from the green menu, and click *Stop Sharing*.

Copy or Archive a Connection (Topic 6)

From the Manage Connection screen, you are able to *Copy* a Connection. This is useful if you would like to build a Connection that is very similar to an existing one you already have. To do this, from Connection Administration in the green menu on the left side of the screen, select the *Copy* button. A window appears asking you to enter a name for the copied Connection. Enter a name and click the green *Copy* button. The system confirms that the Connection has been copied. The new copied Connection will now appear in your list of Connections, which you can access by clicking *MANAGE Connections* from the Connect main menu.

The Connect tool allows you to deactivate a Connection by *Archiving* it. If you archive a Connection, it will no longer display in your list of Connections and will not appear anywhere on the site. It will, however, be retained in the system in case you ever wish to restore it. In other words, the *Archive* function is like a soft delete. To archive the Connection, click the appropriate button in the green menu and confirm your choice in the dialog box that appears.

This completes Connect Module 3 – Managing a Connection. For information on the other dynamic capabilities of the Connect tool, please view the other Connect tutorials available on the CEDS website.