Connect Module 2: Creating a Connection using the Excel Template (Part 1)

This tutorial will demonstrate how to create a CEDS Connection using the Excel template provided in the CEDS Connect Tool. A Connection is a way of showing which CEDS data elements might be necessary for answering a particular data question. For users who have aligned their data systems to CEDS, the Connect tool further allows them to see which elements, in their own systems, would be needed to answer a data question. You have the option to create the Connection manually or by using an Excel template. In this tutorial, we are using the Excel Template. To learn how to create the Connection manually, see *Connect Module 1 – Creating a Connection Manually.*

This tutorial will cover how to download the Excel template, and enter information on the *Connection*, *CEDS Elements*, and *ElementsNotInCEDS* tabs. Explanations of the *Analysis Recommendations* and *Related References* tabs, and how to upload the completed Excel template are covered in Part 2 of Connect Module 2.

Downloading the Connection Excel Template (Topic 1)

In this section, we will explain how to download the Excel template for creating a CEDS Connection. A CEDS Connection consists of several parts: data elements necessary for the question, indicator, or metric being derived; analysis recommendations; and additional information that can be used to explain reporting processes, business rules, or other facets of the Connection.

To build a Connection, you must have a CEDS user account and be logged in to the CEDS Website. For more information on how to create a CEDS user account, view the tutorial titled "Getting Started with the CEDS Tools."

To begin, log into the CEDS website and select *Tools>Connect* from the green menu bar at the top of the screen. You are now on the Connect Main Menu page. Under the "Build" column, click *CREATE a Connection* to get started, then click *Upload Connection Using an Excel File*.

You are taken to an instructional page. Click *Download the Excel Template* and save the file to your hard drive. You can also see an Excel template with sample data included by clicking *Download the Excel template with sample data included*.

Completing Connection Information and Data Elements in the Excel Template (Topic 2)

In this section, we will explain how to complete the Excel template downloaded earlier in this module. To continue, open the Excel template (the one without sample data included) that you previously saved to your computer.

You will notice that the Excel template contains multiple tabs. The first tab provides detailed instructions for completing the template; the second tab, labeled *Connection*, is where you will enter identifying

information about your Connection; in the next two tabs, you will list the data elements needed for this Connection, including those in CEDS and also any that are not currently in CEDS; you can use the *Analysis Recommendations* tab to add business rules to the Connection, and the *Related References* tab to provide references to additional resources; finally, the tab labeled *CEDS Element IDs* contains codes for every element in CEDS, which you will use to specify data elements in the *CEDSElements* tab. To begin, go to the tab labeled *Connection*.

Under the column *Connection_Title_Question*, enter a name for the Connection you would like to build. The Connection's name might be a question from a particular data collection or a policy question. It might also be an indicator or metric used in reporting. In the *Author* column, enter the name of the user, agency, or program creating the Connection. In the *Source* column, enter the name of the agency or institution for which the Connection is being created. If, for example, you are creating the Connection to show how a particular state reports data, you would enter the SEA's name in this field. Next, use the *Description of Connection* column to provide a brief summary or explanation of what this Connection is for. This is the place where you can describe what the particular data question is collecting or additional details about the context of the Connection. This should not be an exact replication of the *Title* or *Question*; rather it should provide additional information for users to understand the purpose of the Connection.

In the *Descriptors* section you will classify the Connection. Consider the categories where other users will search for the Connection. By assigning a descriptor to the Connection, users will be able to find it more easily if you choose to share it. For the purposes of this tutorial, we will classify this as an Arts>Visual Arts Connection. Using the *View Available Descriptors* button found on the Upload screen of the CEDS Website, select as many descriptors as necessary. Then, click "Copy to Clipboard…" The appropriate descriptor IDs can then be pasted into the descriptors cell of the template. To paste the descriptor ID, place your cursor in the appreciate cell, right click, and choose *Paste.* The descriptor ID is now in the spreadsheet. You may assign as many descriptors to a Connection as you like.

Finally, in the column labeled *Additional Information*, enter any information that will be useful for users that is not captured in other areas of the Connection template. Some examples include, but are not limited to, other uses for the Connection, additional context for the Connection, and more specific questions that can be answered with a few additional elements. It might be helpful to revisit this section after completing the rest of the template; it will be clear at that point whether there are additional items you should include in the *Additional Information* section. Be sure to save your updated file after entering new information.

Now go to the tab labeled *CEDS Element IDs*. Here you will find a list of every element currently in CEDS as well as a corresponding ID number for each one. Find the element you would like to add to the Connection and copy the identifier by highlighting the cell, right-clicking, and choosing *Copy*. Then go to the *CEDSElements* tab and paste the ID to the *CEDS_Element_Data_Model_ID* column. To do this, click inside a cell, then right-click and choose *Paste.* The CEDS element ID is copied into the cell. Separate IDs by commas.

Elements can be grouped together under different labels. Some examples are *Demographic*, *Filter*, and *Aggregator*. Enter each data label on a separate row under the column *Data_Label_Name*. The CEDS element IDs that you would like under that label should be placed on the same row.

The tab labeled *ElementsNotInCEDS* is where you can define elements that could not be found in CEDS. If CEDS Elements and Elements Not Currently in CEDS both belong under the same data group (such as Demographic, Filter, or Aggregator), be sure to apply the exact same labeling under the *Data_Label_Name* column in each tab. If no elements need to be defined, leave the tab blank. Any of the columns in this tab can be left blank. However, if any column has data, then the *Element_Name* column must contain data. If the element contains a code set, use the columns labeled *Code_Set* and *Code_Definition* to supply each code and its meaning. Note that you should include only one code on each row; to add a second code, enter it on the next row and copy all of the information down, changing only the code set information at the end.

This completes Part 1 of Connect Module 2: Creating a Connection using the Excel Template. To finish building the Connection, view Part 2.