Align Module 2: Map Administration

This tutorial explains how to manage your map in the CEDS Align Tool. This means you have already created a map. If you need assistance creating a user account or a map, please view *Getting Started with the Tools* or *Align Module 1: Creating a Map in the Align Tool*.

To begin, log in to the CEDS Website and choose *Tools>Align* from the green menu bar at the top. You are taken to the Align main menu. To see a list of maps you have created or to which you are assigned, click *MANAGE Maps* under the Build section on the left of the page. Select the name of the map to begin working on it. On the Manage Map screen you can see the defining information about your map in the middle and a green menu along the left-hand side. The green menu has three options: Map Administration, Data Elements, and Using the Map. This tutorial will discuss Map Administration. Align Modules 3-5 discuss the functions available under Data Elements and Using the Map.

Map Information (Topic 1)

The first topic we will discuss is Map Information.

The defining information is the information you entered when you created your map. To modify this information, choose the first selection of the green menu, *Map Administration*, and then choose *Map Information*. In addition to the information you entered upon map creation you will see this is where you can manage the *Map Status*. When a map is first created, the system automatically creates the map in *Draft*. When you have completed the alignment of your map, change the *Map Status* from *Draft* to *Complete* on this screen. Changing the map's status to *Complete* does not mean that you have shared your map. Make any changes necessary here and then select *Save*.

Manage User Access (Topic 2)

We will now discuss how to manage user access to your map.

For any map, there are three roles: Map Administrator, Authorized User, and Restricted User. Map Administrators are the "owners" of a map and have access to everything you see now in the green menu. Authorized Users have access to the *Upload Data Dictionary, Add/Modify Elements* and *Manage User Access* options. Restricted Users have read-only access to your map; they can simply review the map's contents but cannot edit or administer it. You will notice at the bottom that you are listed as the Map Administrator.

Select Map Administration, then select *Manage User Access*. You can access a table explaining these three roles from this page.

The actual data owner or manager is typically the Map Administrator. If you have a colleague who will be helping to build the Map, you might assign that person as an Authorized User. If you would like to show a vendor your Map 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.

In the text box, type the email address of the person you would like to add to your map and click *Search*.

If the person does not yet have a user account, a pop-up box will notify you that they are not yet a user and ask you if you want to invite them to join. Select *OK*. Then, complete the information on the screen. The system will send the person an email inviting them to create a user account and notifying them they have been added to your map.

To get back to the Manage User Access Page, click *Cancel*. You will notice that the user you have just invited now appears in the users table.

To invite someone who already has an account, enter that person's email address and click *Search*. This time you will notice that their name appears in the table. Select the checkbox by their name. Choose a role (Restricted User, Authorized User, or Map Administrator). Then select *Add*. Now, along with the other users, you have your fourth user added to the users table.

In addition to adding users, you can also change roles for a user by using the drop-down menu under the column *User Role* on the row for their name.

At the top of this screen you will notice breadcrumb links. By selecting *Manage Map* you will return to the main screen of your map. By selecting *My Maps* you will return to the list of maps available to you.

Archive Map (Topic 3)

This topic will cover how to archive a map.

On the green menu, under *Map Administration* you will see the *Archive Map* feature. If you archive a map, it will no longer display in your list of maps and will appear nowhere 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. You can archive a map by selecting *Archive Map* from the green menu. This will remove the map from your list on the *MANAGE Maps* screen as well as from publication. Map Administrators are the only users allowed to archive a map.

Copy Map (Topic 4)

This section will cover how to copy a map.

Let's say, as an example, you have a data system and are redesigning it. You may want to copy your map to create a new map that you can use to represent the redesigned system. The *Copy Map* feature will assist you. This feature copies over all of the defining information and element information in the map as well as the alignment to CEDS, if so chosen. When you select *Map Administration* and then *Copy Map*, a dialog box appears. You assign the map a new name and you have the option to copy the alignments to CEDS that you have completed on the existing map. When you click *Copy* the new map will appear in your list on the *My Maps* screen. It is important to note that user access is not transferred upon copying. You will be named Map Administrator for the new map and then will need to add any users.

This completes *Align Module 2: Map Administration*. You are now ready to begin entering and aligning your data elements. For information on how to upload a data dictionary, align elements to CEDS, share your map or create reports, please view the other tutorials available on the CEDS website.