

Connect Module 8: Creating Reports

This tutorial will explain how to create reports using Connections in the CEDS Connect Tool. Reports can be created about shared Connections regardless of whether a user is logged into the CEDS Website or not.

Select Connections | See Elements Report (Topic 1)

This topic will discuss the Select Connections | See Elements report. Users do not have to be logged into the CEDS Website to access Connection reports. This report is restricted to Connections that have been shared.

The purpose of this report is to select one or more Connections and generate a consolidated list of elements across them.

To begin, select *Tools>Connect* from the green menu at the top of the CEDS Website. You are taken to the Connect home screen. Under the “Use” column, click *UTILIZE Reports and Analysis*. Two report buttons appear. For this topic, choose *Select Connections | See Elements*.

There are several ways to generate a report: by using the Location dropdown box and selecting one or more states; by entering key words in the *Search* box located below the Connect Main Menu button on the right side of the page; or by using the “Select one or more categories” option on the left.

To search using the Location dropdown box, use the dropdown arrow to expand the selection and click in the box to the left of the state or states you wish to view. Click *Filter*. To narrow your search further, enter a key word in the *Search* field after selecting the state or states. This will return all Connections that match the key word entered and the selected state or states.

To search via the Search box, enter a search term in the *Search* field and click *Filter*. Any categories, descriptors and Connections containing those words are displayed.

To search by categories, click the purple box labeled “Select one or more categories.” Categories appear in which there is one or more shared Connections. Click on all categories in which you are interested and click the magnifying glass. Descriptors for those categories appear under each selected category. The definition of the descriptor appears under each descriptor. You can select the descriptors by clicking on the hyperlink. All shared Connections linked to that descriptor are displayed at the bottom. Select as many categories and descriptors as you like. In the descriptors list, clicking on a category name collapses that category so you can see the remaining selections more easily.

Step 2 of generating the report involves selecting the Connection or Connections. You can view the Connection in a popup window by clicking on the magnifying glass. If you want to choose that Connection, simply click the checkbox next to the Connection title. You may select up to 10 Connections to view on the screen or up to 25 viewable as a download. Make your selections and click “Next.”

The system displays the report as a table. The first column is the list of CEDS elements across all Connections selected. Each CEDS element will appear only once in the list regardless of how many Connections contain it. Each subsequent column is for each Connection selected during Step 2. The title of the Connection is the column header. Clicking on the Connection title displays the Connection in a popup window. Within each column is an indicator if the element appears in that Connection.

An Options button appears in the top right of the screen. You can start over, which takes you back to the reports screen. You can select more Connections, which takes you back to Step 1 of this report with all your previously selected Connections remaining selected. You can change the view to see all elements, see only CEDS elements, or see only user-defined elements. You can apply myConnect to this list of Connections, and you can download this report. Note that when you download the report, it will download the information based on your current view. So, if you change the view to see only user-defined elements and then download the report, only user-defined elements will appear in the report.

When you click apply myConnect, another tab appears in the top left of the report that says “myConnect”. You click on it to see the myConnect results. To switch back to the report, simply click the “Reports” tab. An Options button also appears on the myConnect tab where you can start over with the reports and you can download the myConnect results. You also can choose additional maps by selecting myConnect again under the Options button.

Select Elements | See Connections Report (Topic 2)

This topic will discuss the Select Elements | See Connections report. Users do not have to be logged into the CEDS Website to access Connection reports. This report is restricted to Connections that have been shared.

The purpose of this report is to select one or more CEDS elements and generate a list of Connections that include those elements.

To begin, select *Tools>Connect* from the purple menu at the top of the CEDS Website. You are taken to the Connect home screen. Under the “Use” column, click *Utilize Reports and Analysis*. Two report buttons appear. For this topic, choose *Select Elements | See Connections*.

The first step is to select one or more CEDS elements. You can either search for an element via the search box or you can drill down into the Domain Entity Schema to find the element or elements you wish to select. To use the search box, simply type a word or words and select Filter or press Enter. The results display in a table with the first column of the table showing the domain, entity and category and the second column showing the element name. You can view more information about the element by clicking on the element name. If you wish to select the element, simply click the box to the left of the row and a check mark will appear. If you wish to clear the results, select “Reset Filter”. Note that selecting “Reset Filter” after you select an element will clear the selection.

You can also search for an element by drilling down into the Domain Entity Schema. Simply click the small box to the far left of the domain, entity or category to further expand it until you get to the elements. You can see details about an element by clicking on the element name. To select the element, simply click the box to the left of the element name and a check mark will appear. You can also select an entire domain, entity or category by clicking the checkbox next to the appropriate level. Selecting an entire domain or entity may result in slower response time due to report generation on multiple elements.

Once you have selected all the elements you wish to see, click Next. The report now displays all the elements in a column with a plus sign to the left of the element name. Click on the plus sign to expand a single element or select “Expand All” at the top to expand all elements at once. When an element is

expanded, if there is at least one shared Connection that includes that CEDS element, it will appear in a table with the title in the first column and the Connection description in the second column. If no shared Connections contain the selected CEDS element, the system will display a message indicating such.

Using the Options button at the top of the screen, you can download the report, select additional CEDS elements, or start over on selecting elements.

This completes *Connect Module 8: Creating Reports*. For information on 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.