ConnectUs Getting Started Guide

Introduction

Welcome to ConnectUs. This Getting Started Guide is intended to introduce you to the fundamental features of ConnectUs.

Before you begin, there are a few things you should know about ConnectUs and how it works.

System Requirements

ConnectUs requires a Windows 8 or higher Operating System or Google Chrome. In addition, you must have ConnectUs Version 14.0 or later.

Signing Up for ConnectUs

Sign up for ConnectUs is performed from the computer with the ConnectUS application loaded on it. You must sign up to create an account on our server and to download the file that retrieves your data.
Note: When signing up, the ConnectUS application must be closed on your computer.

To sign up for ConnectUs:

1. On the ConnectUs webpage, click **Sign up here**.
2. Click **Yes** to download a file.
3. Enter your ConnectUs **Username** and **Password**.
4. Click **OK**. Your site number and site name displays.
5. Enter your First Name, Last Name, and e-mail address and click **Create Database**. The e-mail address entered here is for the Administrator of your ConnectUs data.

Your database is now being created. You will be sent an e-mail giving you a personalized ConnectUs web address and your login information.

Logging into ConnectUs

1. On the ConnectUs Home page, enter your **Site Number** and click **Login**.
2. Enter your ConnectUs **User Name** and **Password** and click **Login**.

Startup Outline

Startup Outline is intended to provide you with the recommended order for setting up ConnectUs. Only users with administrative rights can perform the following functions:

- Export data
- Import data
- Add users

Exporting Data from ConnectUs

You must run the Export Utility from ConnectUs on device with the ConnectUs application. When you run the Export Utility, you are creating an export file from your database that will be imported to our secure server. The data viewed on ConnectUs is kept up-to-date based on how often you Export and Import your data to ConnectUs.

Note: When exporting data from ConnectUs, the application must be closed on your computer.

To export data from ConnectUs:

1. Click the **CONFIG** tab in the upper right of ConnectUs.
2. Click **Import/Export Data**.
3. Click **Go to Export Utility**.
   Note: The first time you export, you receive a message to install and run the Webexpx.ocx. Click **Yes**.
4. Enter your **User Name** and **Password** and click **OK**.
5. Make selections in the **Export Selections** box and click **Export**. Make sure your Firewall settings allow data to be transferred. *See Figure 1.*
6. When the upload is complete, click **OK**.

Figure 1: Export Selections box

Importing Data into ConnectUs

You can import data to ConnectUs to update the information that is viewable. That data that you import is the data that was created in the export file.

To import data into ConnectUs:

1. Import your data after exporting on the **Import Data** screen. *See Figure 2.*
2. Click **Refresh Database**. The data is not imported or viewable until you refresh the database.
3. When the file import is complete, close the **File Import Complete** screen. You can now view the Import History to verify the data import.

Figure 2: Import Data screen

Adding Users in ConnectUs

ConnectUs users do not automatically become ConnectUs gain user rights when they sign up. An administrator must complete the add process for the user to gain functionality.

To add a user:

1. Click the **CONFIG** tab in the upper right of ConnectUs.
2. Click **Add/Edit Users**.
3. Click **Add User**.
4. Enter the **User Name**.
5. Enter the user's **Password**.
6. Retype the password to confirm it.
7. Select **Yes** to grant the user **Administrative Rights**.
8. **Optional:** Enter the user's **E-mail Address**.
9. Click **Add**.
7. Click **Close**.