ED DATA INVENTORY BETA

Updating Existing EDI Records | Edit User Guide

Go to https://datainventory.ed.gov/.
Click **LOG IN** in the Navigation Bar.
Enter login credentials (see right).

Email: ....@ed.gov
Password: P@ssw0rd

UPDATING YOUR SERIES

Click **ADMIN** in the Navigation Bar.
Click **Manage Series**. A list of series to which you have access will appear here.
Click **Review & Edit** across from the series of interest.

Check the "Series Status" at the top of the page.

If the series is *Released*…
Review the Series information included on the ***Edit Series*** page. If updates are required, email EDI@anlar.com with requested changes.

If the series is *In Progress* or *Unreleased*…
Review the Series information included on the ***Edit Series*** page. Update the form with available information

After reviewing the form and making necessary updates, return to the top of the page and click **Save & Submit Series for Approval.** Your series has now entered the approval workflow. Check the top of the page to ensure the series' status is now *Pending Approval*.

Repeat steps for all series to which you have access.
Return to list of series by clicking **ADMIN** in the Navigation Bar and then **Manage Series**.

UPDATING YOUR STUDIES

Click **ADMIN** in the Navigation Bar.
Click **Manage Studies.** A list of studies to which you have access will appear here.
Click **Review & Edit** across from the study of interest.

Check the "Study Status" at the top of the page.

If the study is *Released*…
Review the information included on the ***Edit Study*** page. Click **Initiate Edit Workflow** at the top of the page. Update the form with available information.

If the study is *In Progress* or *Unreleased*…
Review the Study information included on the ***Edit Study*** page. Update the form with available information.

EDI Record Hierarchy

Series*	
Study*	
Follow-Up*	Dataset
Study Details*	File
Collection	Element
Respondent	Element Value

*Required sections

After reviewing the form and making necessary updates, click **Save** at the bottom of the page.

Follow-Ups and Additional Study Information*
Scroll to the bottom of the ***Edit Study*** page to the *Follow-Ups* section. If a Follow-Up record is listed, click **Review & Edit** across from the first listed. If not, click **Add Follow-Up.** Complete the form with information available.
Tip: *If the study does not have a follow-up, then select "NA" for Longitudinal Follow-Up. The fields will auto-populate with "NA" and you can proceed to add Study Details and following sections.*
Click **Save**.

Study Details*
Scroll to the bottom of the ***Edit Follow-Up*** page to the *Study Details* section. If a Study Details record is listed, click **Review & Edit**. If not, click **Add Study Details**. Complete the form with information available.
Tip: *If you wish to have the study appear on the EDI public site, check* ***Releasable*** *in the first section.*
Click **Save**. Tables beyond this point are strongly encouraged, but not required.

Collection
Scroll to the bottom of the ***Edit Study Details*** page. If a *Collection* record is listed, click **Review & Edit** across from the first listed. If not, click **Add Collection**, if applicable. Complete the form with information available. Click **Save**.
Tip: *A study can have multiple associated Collection records. After saving, you can review/add additional collections by clicking* ***Back to Study Detail*** *at the top of the* **Edit Collection** *page. In the* Collections *section, either click* ***Review & Edit*** *across from the next listed or* ***Add Collection****.*

Respondent
Scroll to the bottom of the Edit Collections page. If a *Respondent* record is listed, click **Review & Edit**. If not, click **Add Respondent**, if applicable. Complete the form with information available. Click **Save**.
Tip: *A Collection can have multiple associated Respondent records. After saving, you can review/add additional respondents by clicking* ***Add Respondent*** *in the* Respondents *section at the bottom of the* **Edit Collection** *page.*
Click **Save & Return to Collection**.

Once finished, click **Save & Return to Study**. If the Study has more than one Follow-Up, repeat steps for each.

ADDING A DATASET/FILE (OPTIONAL)

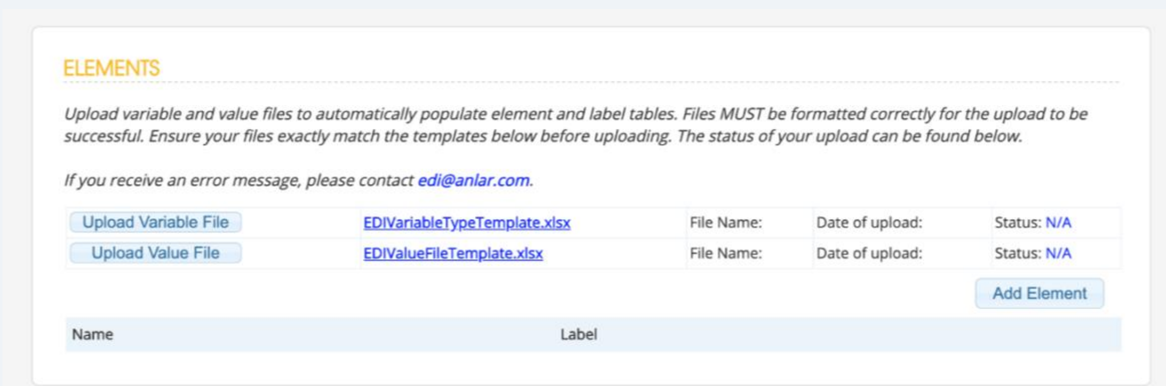
At the bottom of the ***Edit Study*** page, scroll to the *Dataset/File* section at the bottom of the page. If a Dataset record is listed, click **Review & Edit**. If not, click **Add New**.

Enter or update the Dataset Name. Click **Save & Add File**.
Scroll to the *File* section at the bottom of the page. If a File record is listed, click **Review & Edit** across from the first listed. If not, click **Add File**.

Complete the form with available information. You can enter up to four locations/formats for the file, however only one is required. Click **Save & Add Element**.

Scroll to the *Elements* section at the bottom of the page. Users have two options for populating elements and their associated values.

1. **Auto-Populate Tables via File Upload (recommended)**: Use the downloadable templates to populate files with the file's variables and values. Upload files to the EDI by clicking **Upload Variable File** and **Upload Value File**, respectively.
   Tip: *Make sure files are formatted correctly according to the template; the system cannot auto-populate element and value tables if they are not. Upload the Variable file first, then the Value file (if applicable).*
   The table will populate with the File Name, Date of Upload, and the Status. Once complete, click **Save & Return to Study**.



2. **Manual Input**: Click **Add Element**. Complete form with available information. Click **Save & Add Value**. Scroll to the *Element Values* section and click **Add Value**. Complete form with available information. Click **Save & Return to Study**. Navigate back to the ***Edit File*** page to add additional Elements and Values. Once complete, click **Save & Return to Study**.

At the top of the ***Edit Study*** page, click **Save & Submit Study for Approval**.
Your study has now entered the approval workflow. Check the top of the page to ensure the study's status is now *Pending Approval.*

Repeat steps for all studies to which you have access.
Return to list of series by clicking **ADMIN** in the Navigation Bar and then **Manage Studies**.

Your series and study will be reviewed by your program office's designated reviewer. If no issues are found, series and studies will be released and included in the EDI database.

For more information about the purpose and requirements of the EDI, refer to the EDI User Resources page. If you encounter any issues, please contact EDI@anlar.com.