ED DATA INVENTORY BETA

Creating EDI Records | PO Approver Guide

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

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

CREATING A NEW SERIES

Click **ADMIN** in the Navigation Bar.
Click **Manage Series**. A list of series to which you have access will appear here.
Click **Add Series** in the top right-hand corner. Complete the form with information available.

TIP: *The Principal Office drop down is populated by records created on the* ***Manage Principal Office*** *page. The Contact Information drop downs are populated by records created on the* ***Manage Contact*** *page. The Preferred Approver drop down is populated with the list of users with PO Approver status, determined by system administrators.*

If you need to navigate away from the page before submitting the form for review, click **Save & Add Study** at the bottom of page. While you will navigate away from the series page, the entered information will be saved and the series' status will be *In Progress.* The series will appear on the ***Manage Series*** page and you can return to it at any time to continue entering information.

After the form is completed, click **Save & Approve** at the top of the ***Edit Series*** page. Your series has now entered the approval workflow. Check the top of the page to ensure the series' status is now *Pending System Admin Approval.*

CREATING A NEW STUDY

Click **ADMIN** in the Navigation Bar.

Via the respective *Edit Series* page

Click **Manage Studies.**
Click **Review & Edit** across from the series.
Scroll to the bottom of the ***Edit Series*** page.
In the Related Studies section, click **Add New.**

Via the *Manage Study* Page

Click **Manage Studies.**
Click **Add New** in the top right-hand corner.
Select the respective series from the Series/Program Name drop down.

Complete the form on the ***Add Study*** page with information available.
Click **Save & Add Follow-Up/Dataset**.

NOTE: *As shown in the EDI Record Hierarchy image on the next page, studies are structured with two branches of child records. One branch is anchored by a dataset record, the other by a follow-up record. First, we will discuss the actions need to complete the follow-up branch, followed by the dataset.*

Follow-Ups and Additional Study Information*
Scroll to the bottom of the ***Edit Study*** page. In the *Follow-Ups and Additional Study Information* section, click **Add Follow-Up.** Complete the form with information available.
Tip: *If the study does not have a follow-up, 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 & Add Study Details**.

Study Details*
In the *Study Details* section, 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 & Add Collection**. Tables beyond this point are strongly encouraged, but not required.

EDI Record Hierarchy

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

*Required sections

Collection
In the *Related Collections* section, click **Add Collection**. Complete the form with information available.
Click **Save & Add Respondent**.
Tip: *A study can have multiple associated Collection records. After completing a Collection's respective Respondent form(s), add additional Collection records by clicking* ***Back to Study Detail*** *at the top of the* **Edit Collection** *page. Once on the* **Study Detail** *page, scroll to the* Collections *section and click* ***Add Collection****.*

Respondent
In the *Respondents* section, click **Add Respondent**. Complete the form with information available.
Click **Save & Return to Collection**.
Tip: *A Collection can have multiple associated Respondent records. After completing the first Respondent form, add additional Respondent records by clicking* ***Add Respondent*** *in the* Respondents *section at the bottom of the* **Edit Collection** *page.*

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

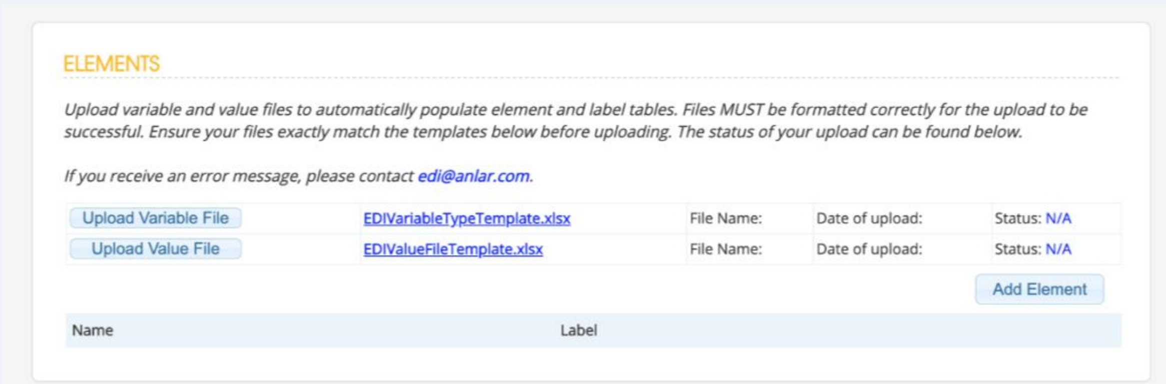
ADDING A DATASET/FILE (OPTIONAL)

At the bottom of the ***Edit Study*** page, scroll to the *Dataset/File* section at the bottom of the page. click **Add Dataset**.

Enter the Dataset Name. Click **Save & Add File**.
In the *File* section, 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**.

Users have two options for populating forms for 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**.

If you need to navigate away from the page before submitting the study for review, click **Save** at the bottom of the ***Edit Study*** page. Check to ensure the study's status is now *In Progress.*

Once the form is completed, click **Save & Approve** at the top of the ***Edit Study*** page. Your study has now entered the approval workflow. Check the top of the page to ensure the study's status is now *Pending System Admin Approval.*

Once submitted, records are reviewed by an Admin User for completeness. If no issues are found, series and studies will be released and included in the EDI database.

RESOURCES & ASSISTANCE

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]().