ED DATA INVENTORY BETA

Updating EDI Records | PO Approver Guide

Go to https://datainventory.ed.gov/.
Click **LOG IN** on the menu 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 *Pending Approval, 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 & Approve.** 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*.

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**.

REVIEWING 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. If updates are required, click **Initiate Edit Workflow** at the top of the page. Update the form with available information.

If the study is *Pending, Approval*, *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.

Scroll to the *Follow-Ups and Additional Study Information* section at the bottom of the page. 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**.

Scroll to the *Study Details* section at the bottom of the page. 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 not required, but encouraged.

Scroll to the *Collections* section at the bottom of the page. If a *Collections* record is listed, click **Review & Edit**. If not, click **Add Collection**, if applicable.
Complete the form with information available. Click **Save**.
Tip: *After saving, you can add additional collections by clicking* ***Back to Study Detail*** *at the top of the* ***Edit Collection*** *page. Once on the* ***Edit Study Detail*** *page, click* ***Add Collection*** *again.*

Scroll to the *Respondents* section at the bottom of the page.
If a *Respondent* record is listed, click **Review & Edit**. If not, click **Add Respondent**, if applicable.
Complete the form with information available.
Tip: *After saving, you can add additional respondents by clicking* ***Back to Collection*** *at the top of the* ***Edit Respondent*** *page. Once on the* ***Edit Respondent*** *page, click* ***Add Respondent*** *again.*
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**.

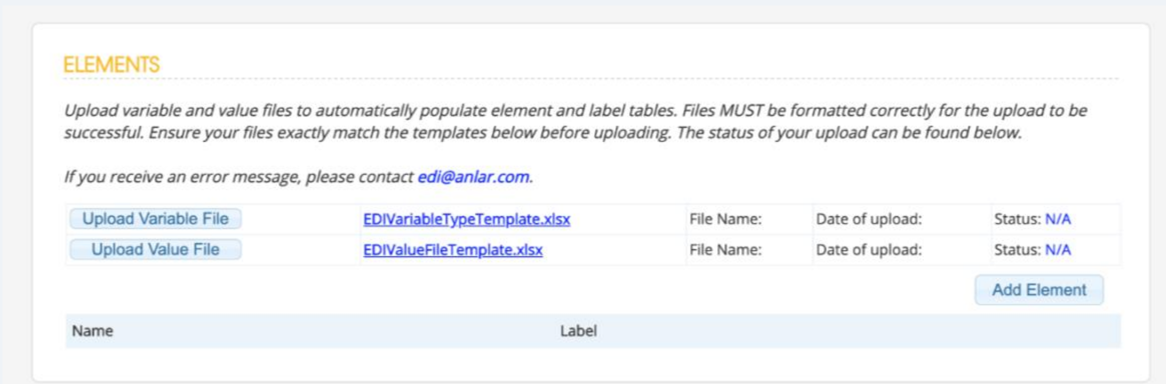
Enter or update the Dataset Name. Click **Save & Add File**.

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 & Approve**.
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*.

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

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.