ED Data Inventory
Standard Operating Procedures

Version 2.0

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Introduction

The U.S. Department of Education (ED) Data Inventory (EDI), hosted at datainventory.ed.gov, is a publicly-accessible platform that enables users to access the metadata associated with ED studies and data collections. This document describes the Program Office (PO) Approver user role within the EDI and the processes required to submit new and maintain existing records within the EDI.

The creation of the Inventory is a component of the Department's larger effort to ensure responsible data management and decision making in response to the Foundations for Evidence-Based Policymaking Act of 2018. The EDI promotes transparency within the Department and with the public by documenting all data reported to the Department, such as data collected as part of grant activities and other statistical data, with the exception of personnel and administrative data. This increased access helps improve the coordination of data collections across program offices, reducing data collection burden on respondents and increasing data access for improved analysis.

The EDI includes descriptive information about each data collection and information on the specific data elements in individual collections, or metadata. This includes a study or data collection's methodology, variables, respondent information, and code sets. The descriptive information required for each EDI record includes information submitted as part of the Office of Management & Budget (OMB) Information Collection Review (ICR) Package: program office contact information, collection dates, respondent information, and other metadata associated with the collection. Users also have the opportunity to submit specific element descriptions and link(s) to datasets that have been publicly released.

The EDI utilizes an online portal that enables approved Department staff to create or modify EDI entries through a user interface. The approved program office staff who are granted either Edit User, Program Office (PO) Approver, or Admin User status must log in to the restricted access section of the site to add or update EDI records. Before additions or edits are finalized within the database, records must complete the EDI Record Approval Process. This process allows staff to manage their new or modified EDI entries and submit them to senior staff for review and eventual release to the public EDI site.

The information and instructions captured within this document will guide PO Approver users through the areas of the site critical to their work. Additional user resources and Quick Start Guides are available on the *EDI User Resources* page, accessible after logging in and clicking the **Admin** button on the Navigation Bar. If there are additional questions or system access needs to be obtained, please contact EDI@anlar.com.

System Overview

The records that make up the EDI are managed by program offices through an online user interface. Program offices are encouraged to review and update EDI records annually or as new information becomes available, adding new studies as they are collected, and updating existing records as necessary.

Roles and Responsibilities

Some areas of the EDI site are available to the public, while others, such as the ability to add and edit records (series, studies, follow-ups, datasets, etc.), are protected and accessible only to authorized users via a login page. To ensure the integrity and accuracy of the information included in the EDI, there are three user types with varying levels of access and responsibility. These users each play a unique role in the EDI Record Review Workflow in which new or modified series or studies are reviewed prior to public release. The assigned role will determine the access and approval authority. The three user types are:

- **Edit Users:** Possess the ability to add new series and studies; Edit Users can update released studies through the user interface and request modifications to released series by submitting requests to EDI@anlar.com.
- **PO Approvers:** Possess all Edit User permissions with the added ability to approve/reject submissions from Edit Users within the approval process.
- **Admin Users:** Possess all PO Approver user permissions, with the added ability to create or manage user accounts, assign series access, update released series, approve/reject a series or study for release to the public EDI website, export the JSON of data contained in the EDI, and view the ICR Import Audit Log.

EDI Data Types

Data contained within the EDI is organized into series, which refers to a program data collection or a collection of Institute of Education Sciences (IES) studies repeated over time. Within each series are studies, which are defined as individual data collection occurrences. For example, a grant program may conduct an annual data collection. The program collection is the series, while each time the collection is conducted (in this case annually), it is listed as a study under the series; an individual study can contain additional data collections or follow-ups.

Record Hierarchy

The EDI organizes series, studies, datasets, follow-ups, and their respective child records as a hierarchy.

The system requires that you adhere to the structure outlined in the table displayed to the right. It is only possible to add a child record once the parent record (the record occupying the position directly above it) has already been created and saved. To ensure this process is followed, the system will only present you with the opportunity to input information for a child record once the parent record has been saved. For example, the *Follow-Up* section will only appear once information in the *Study* section has been saved. This process occurs for each level within the hierarchy.

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

*Required Sections

In order for records to be publicly displayed, a series must have at least one study with complete *Follow-Up* and *Study Detail* sections; the *Collection* and *Respondent* sections are not required but strongly encouraged. An abbreviated version of the EDI's Data Dictionary, including each section's variables, variable descriptions, and permitted values (if applicable), is available in Appendix A.

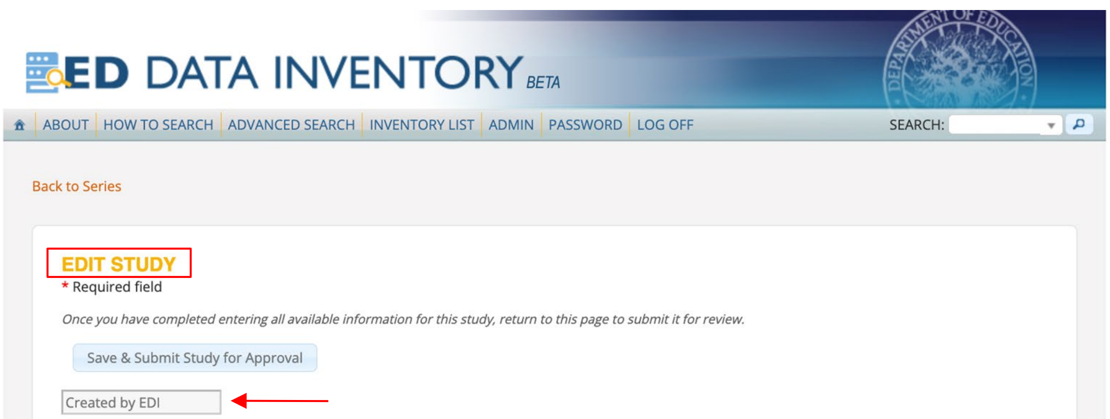
A study can have multiple follow-ups and datasets associated with it. Cross-sectional studies that do not have follow-ups will select *NA* in the *Follow-Up* section to proceed to the next section. See the *Follow-Ups And Additional Study Information* section for more information.

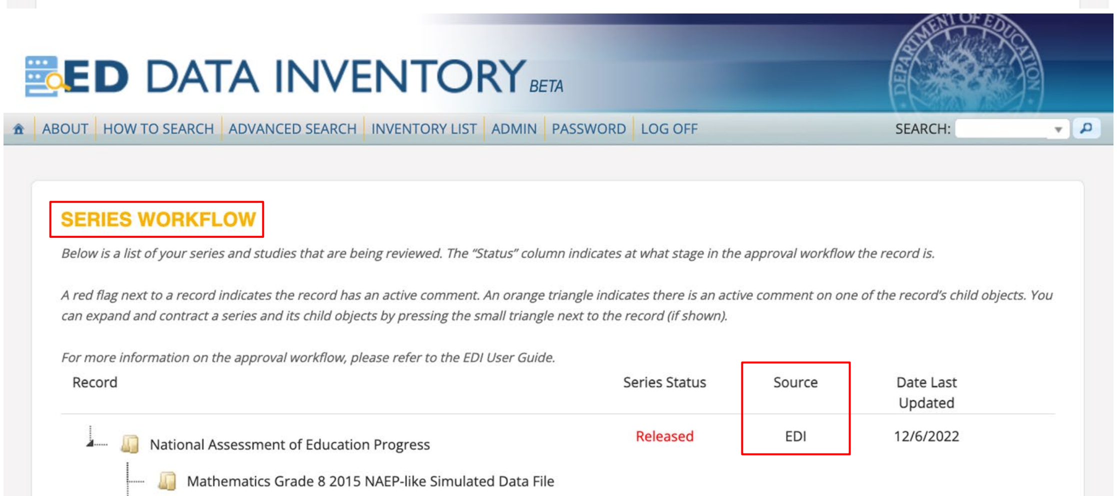
NOTE: As shown in the image, studies are structured with two branches of child records. One branch is anchored by a follow-up, the other by a dataset; this document will follow each branch under the study from beginning to end.

Record Source

A study record can originate via manual entry using the EDI's user interface or from an Information Collection Request (ICR) template import. When a package is approved within the ICR template, the relevant information is automatically transferred to the EDI through an overnight process. The information will be loaded to populate a new EDI record ready for review by the respective Edit Users and PO Approvers. Records created through the ICR template import process are edited, reviewed, and published in the same way as those originating in the EDI.

The source of a record can be found at the top of the *Edit Study* page or in the *Source* column on the *Manage My Series/Studies* page. If there are further questions regarding an ICR imported record, please contact EDI@anlar.com.





Approval Workflow

Prior to being officially added to the EDI database, or *"Released"*, records must complete the role-based approval workflow where records are created, edited, and reviewed. Each user type plays a unique role in the workflow. For more information on users' responsibilities relating to the role-based approval workflow, please refer to the *EDI Record Review Process* section.

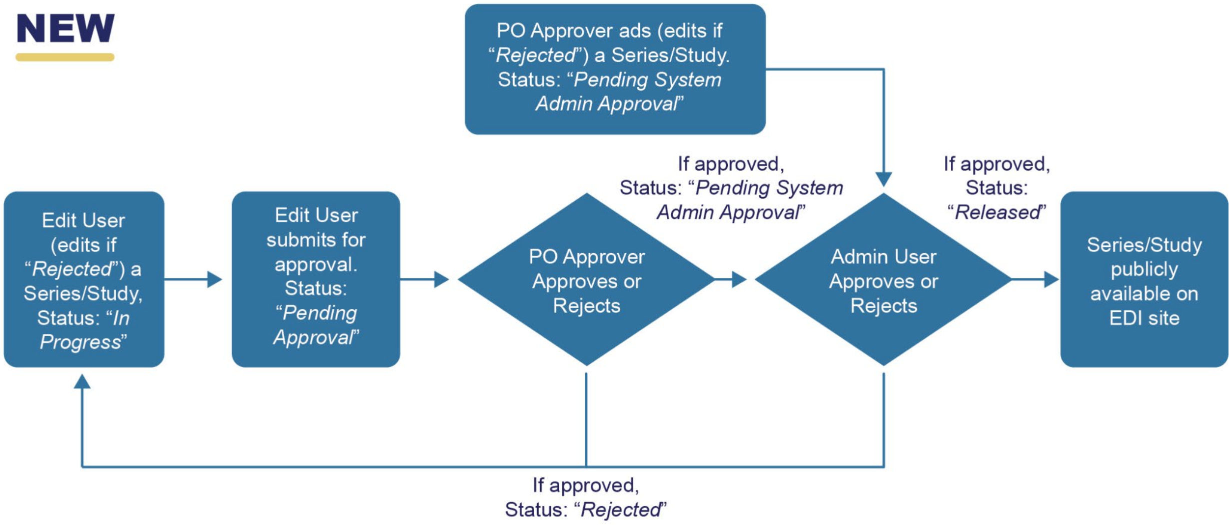
EDI records can exist in one of the following statuses:

- **Unreleased:** Series or studies that are *"Unreleased"* were not complete when migrated to the EDI.
  - These series and studies should be reviewed; they will be released once the review and any necessary updates have been completed.
- **In Progress:** Series or studies that are *"In Progress"* have been created and saved but not yet submitted for review.
  - Studies imported from the ICR will be loaded in the EDI with the status of *"In Progress"*.
- **Pending Approval:** Series or studies that are *"Pending Approval"* have been created or edited by a user.
- **Pending System Admin Approval:** Series or studies that are *"Pending System Admin Approval"* have been submitted to Admin Users for review.
- **Released:** Series or studies that are *"Released"* have been completed and have exited the approval workflow.
  - If the study is publicly releasable (see *Study Details*), it will appear on datainventory.ed.gov; if not, the record will be maintained within the EDI exclusively for authorized users to access.
- **Rejected:** Series or studies that are *"Rejected"* have been found to be inaccurate or incomplete by a reviewer and require updates.

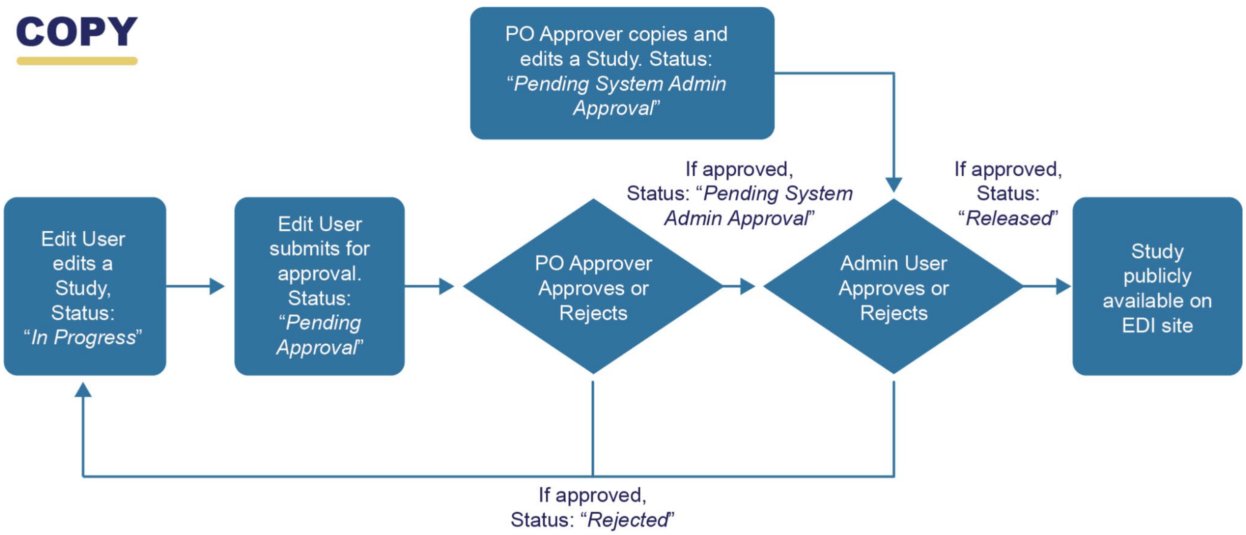
The flow charts provided describe the creation and approval process of different records within the EDI.

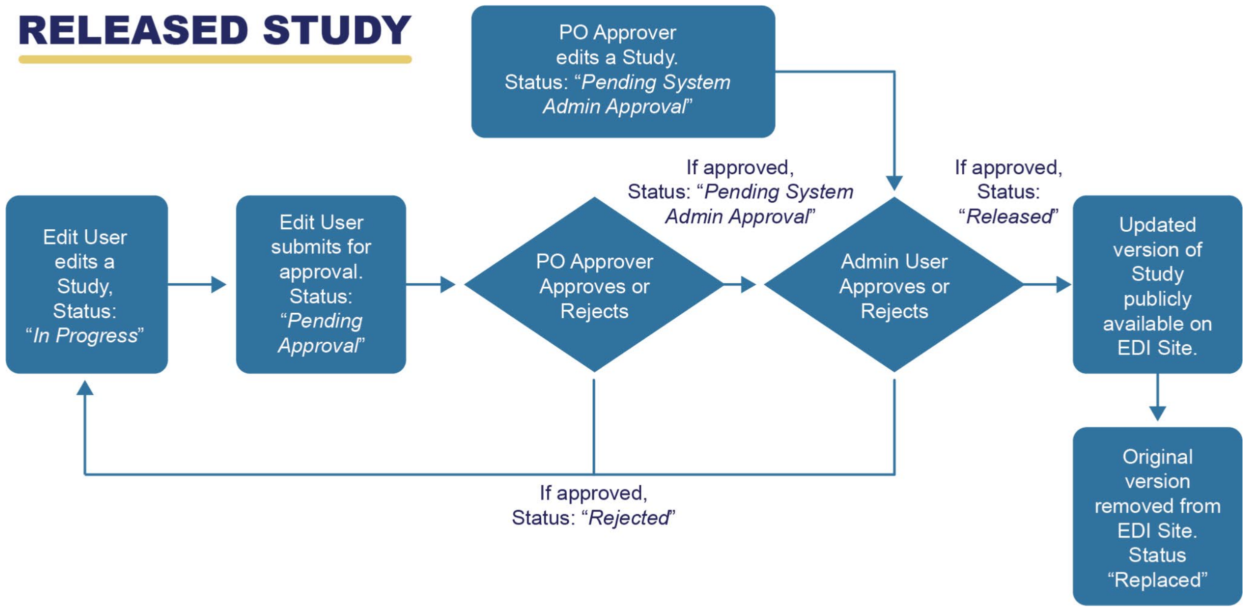
As described in *Editing Released EDI Records*, *"Released"* series can only be edited by Admin Users; if a user wishes to update a *"Released"* series, they should submit their request to EDI@anlar.com.

NEW


PO Approver ads (edits if "*Rejected*") a Series/Study. Status: "*Pending System Admin Approval*"
Edit User (edits if "*Rejected*") a Series/Study, Status: "*In Progress*"
Edit User submits for approval. Status: "*Pending Approval*"
PO Approver Approves or Rejects
If approved, Status: "*Pending System Admin Approval*"
Admin User Approves or Rejects
If approved, Status: "*Released*"
Series/Study publicly available on EDI site
If approved, Status: "*Rejected*"

COPY


PO Approver copies and edits a Study. Status: "*Pending System Admin Approval*"
Edit User edits a Study, Status: "*In Progress*"
Edit User submits for approval. Status: "*Pending Approval*"
PO Approver Approves or Rejects
If approved, Status: "*Pending System Admin Approval*"
Admin User Approves or Rejects
If approved, Status: "*Released*"
Study publicly available on EDI site
If approved, Status: "*Rejected*"



EDI System Review

The sections below describe the individual actions required for authorized users to add or update a record within the EDI. Each section includes descriptions, screenshots, required fields, tips, and frequently asked questions related to the page and its functions. Once a record has been completed with all available information, Program Office (PO) Approver Users will review and submit the record for administrative review. For more information on submitting and reviewing records, refer to the *EDI Record Review Process* section.

For specific step-by-step instructions, refer to the following Quick Start Guides available on datainventory.ed.gov after logging in and clicking the **Admin** button on the Navigation Bar:

- Introduction to the EDI
- Creating New EDI Records (PO Approver User)
- Updating Existing EDI Records (PO Approver User)
- Reviewing EDI Records (PO Approver)
- Adding Element Files
- Element File Data Quality Checklist
- DIG File Upload Process

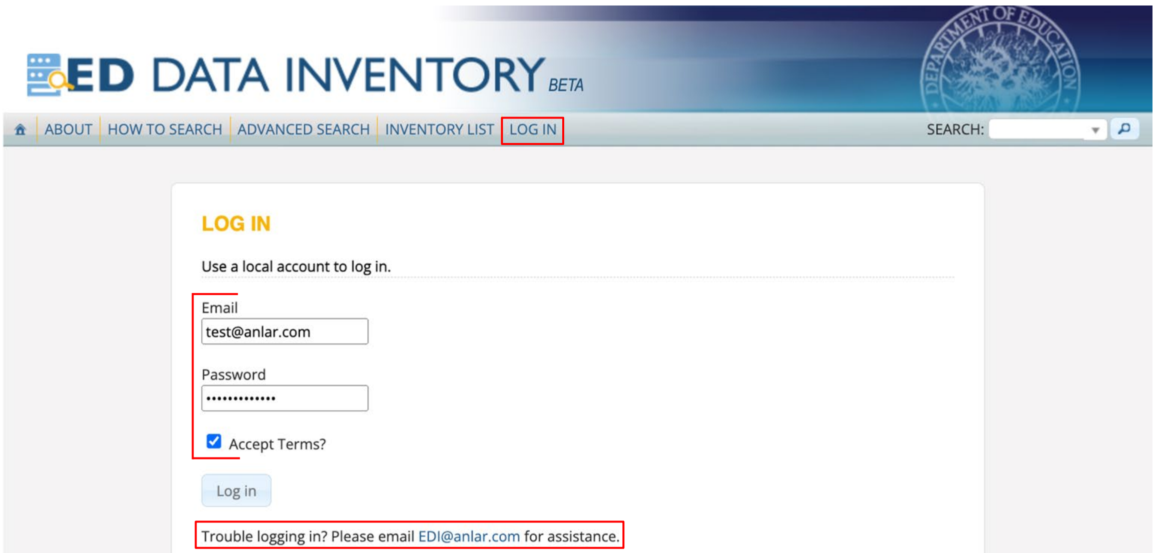
In addition, the following templates and resources are available for assistance:

- Element Variable File Template

- [Element Value File Template]
- [Department of Education Program Codes]

Login

To access the EDI data entry features, you must log into datainventory.ed.gov. Clicking the **Log in** button at the top of the Navigation Bar will redirect you to the *Log in* page where you will enter an email address and password. Additionally, you must accept the system terms and conditions by checking the associated **Accept Terms** checkbox.

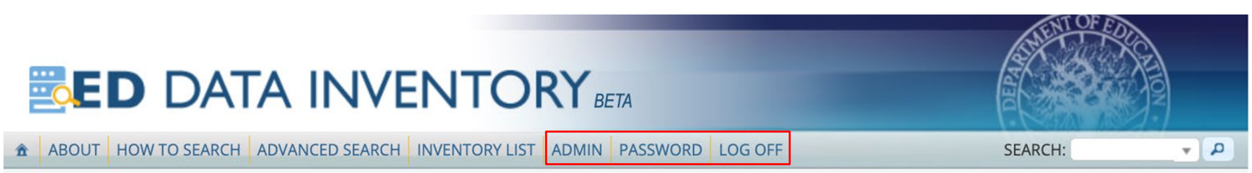


NOTE: If your login attempt is not successful, contact EDI@anlar.com.

To create a new account, reach out to the system administrator at EDI@anlar.com to ensure the appropriate access is granted.

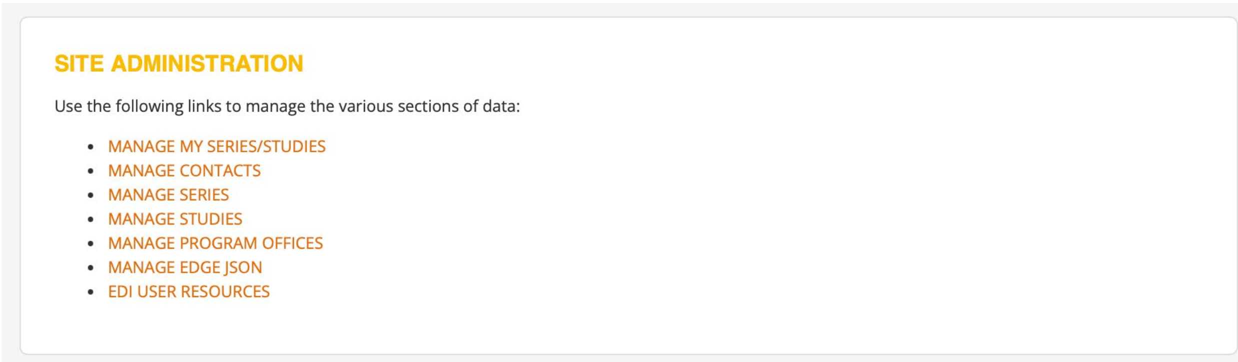
Non-Public Navigation Bar

Once you have logged in, additional non-public menu items will display in the Navigation Bar: **Admin, Password, and Log Off.**



Admin

Once logged in, click **Admin** on the Navigation Bar to be redirected to the *Site Administration* page which allows you to access the following system pages: **Manage My Series/Studies, Manage Contacts, Manage Series, Manage Studies, Manage Manage Program Offices, Manager EDGE JSON,** and **EDI User Resources.**



Password

The **Password** button within the Navigation Bar enables you to update your password. You will need to enter the current password as well as the new password; if the password is forgotten or unrecoverable, you can reach out to the system administrator at EDI@anlar.com to have a temporary password assigned.

Site Administration

The *Site Administration* page will display several links for navigating the EDI. PO Approver users will be presented with the following options on the *Site Administration* page:

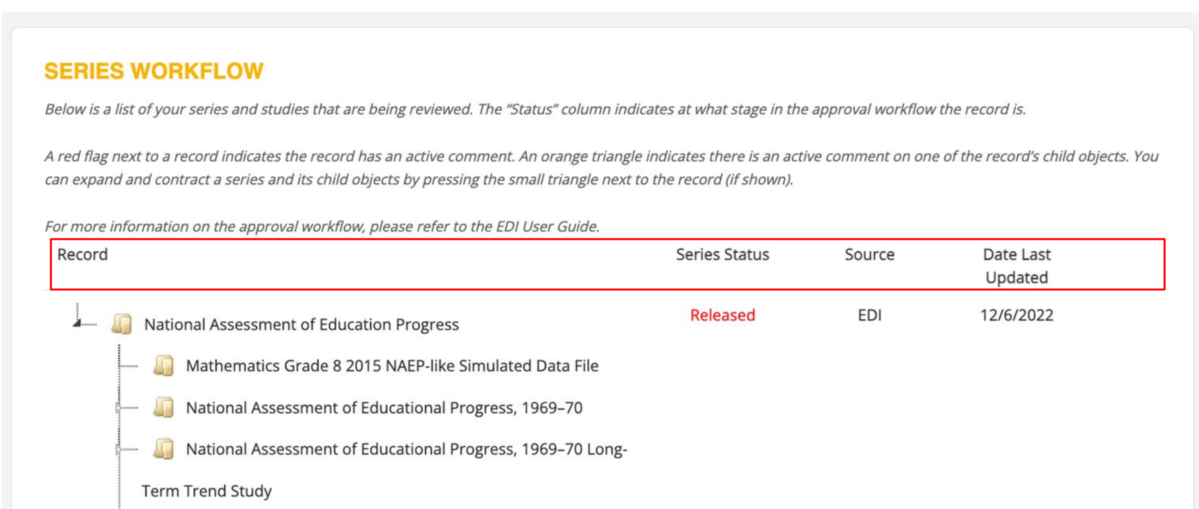
- **Manage My Series/Studies:** Redirects you to the *Series Workflow* page
- **Manage Contacts:** Redirects you to the *Contacts* page
- **Manage Series:** Redirects you to the *Manage Series* page
- **Manage Studies:** Redirects you to the *Studies* page
- **Manage Program Offices:** Redirects you to the *Manage Program Offices* page
- **Manage EDGE JSON**: Redirects you to the *Manage EDGE JSON* page
- **EDI User Resources:** Redirects you to the *EDI User Resources* page

Manage My Series/Studies

After logging in and clicking **Admin** on the Navigation Bar, select the **Manage My Series/Studies** link on the *Site Administration* page. You will be redirected to the *Series Workflow* page that lists the series and studies (and their associated child records) you have access to that are currently within the workflow approval process. If you need access to a series or study that is currently unavailable, contact EDI@anlar.com to review access eligibility.

The *Series Workflow* page presents you with the following columns of data:

- **Record:** Displays a hierarchical view of the assigned series, studies, applicable follow-ups, and associated child records that are currently in the approval workflow.
    - The record tree may display partially collapsed, showing only the series and studies in the workflow. To expand the record tree, click the white arrow displayed next to the study name. The arrow should turn black to indicate that it is expanded.
- **Series Status:** Displays the status for each record at the series level. *Series Status* types are: *"Unreleased"*, *"In Progress"*, *"Pending Approval"*, *"Pending System Admin Approval"*, *"Rejected"*, and *"Released"*. (See *Approval Workflow* for more information).
    - Note that series and studies progress through the workflow independently; a series can have the status of *"Released"* while its associated study could still be *"In Progress"*.
- **Source:** Displays whether the record originated within the EDI or ICR.
- **Date Last Updated:** Displays the date the record was last modified.



Note: Only series and studies that (1) you have access to and (2) are currently in the approval workflow will be displayed on the Series Workflow page. If both a series and all of its associated studies have a status of "Released", they will not appear on this page but can be accessed through the Manage Series and Manage Studies pages. For example, a series with an "Unreleased" status or a "Released" series with "Unreleased" child studies will still display in your Series Workflow.

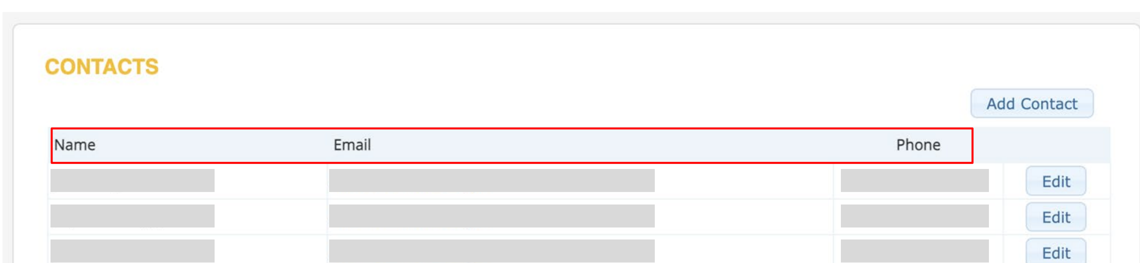
The *Record* column displays an expandable/contractible record hierarchy that includes series, studies, and their child records that are currently in the approval workflow. The highest level of the hierarchy is the series, and each level below represents related child records for the given series. Series, studies, and all other records listed within the hierarchy are displayed as links which, when clicked, open the *Edit* screen for the chosen record.

The *Series Workflow* record hierarchy displays the following two alert-types:

- The flag symbol ( ): Indicates that the record next to the flag has an unresolved comment (unless a child record has an unresolved comment, in which case the flag symbol is superseded by the warning symbol ( )
- The warning symbol ( ): Indicates that a child record has an unresolved comment

Manage Contacts

You are able to view, modify, or add new contacts by navigating to the *Contacts* page (**Admin > Manage Contacts**). Here, existing contacts are listed as view-only in alphabetical order and display the following fields: **Name, Email, and Phone.**

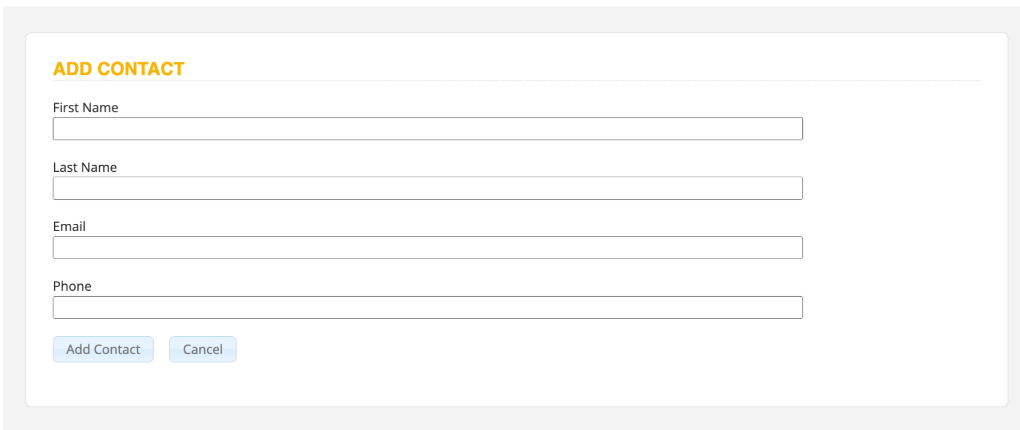


These contacts are used to populate the drop-downs for official study contacts selected on the *Add New Study* page.

Add Contact

You can add a contact to the EDI by clicking on the **Add Contact** button on the top right of the *Contacts* page.

You will be redirected to the *Add Contact* page.



The following fields are available:

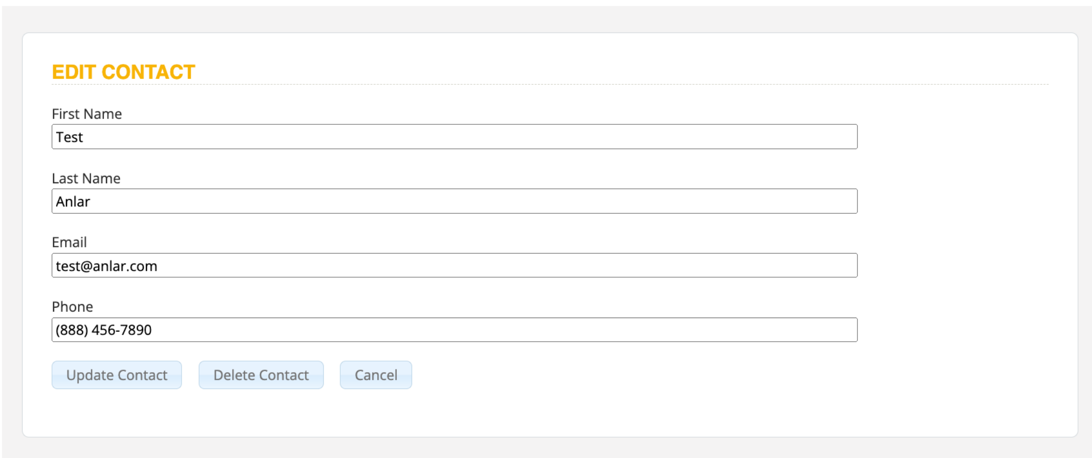
- **First Name:** Text field to provide the contact's first name
- **Last Name:** Text field to provide the contact's last name
- **Email:** Text field to provide the contact's email address
- **Phone:** Text field to provide the contact's phone number

Once you have added the contact's information, click the **Add Contact** button to add the person to the EDI; click **Cancel** to discard the information and go back to the *Contacts* page.

Edit Contact

You can edit an existing contact in the EDI by clicking on the specific contact's associated **Edit** button.

You will be redirected to the *Edit Contact* page.



The following fields are available:

- **First Name:** Text field to provide the contact's first name
- **Last Name:** Text field to provide the contact's last name
- **Email:** Text field to provide the contact's email address
- **Phone:** Text field to provide the contact's phone number

Fields will be prefilled with information currently saved in the EDI. Once you have updated the contact's information, click one of the following buttons:

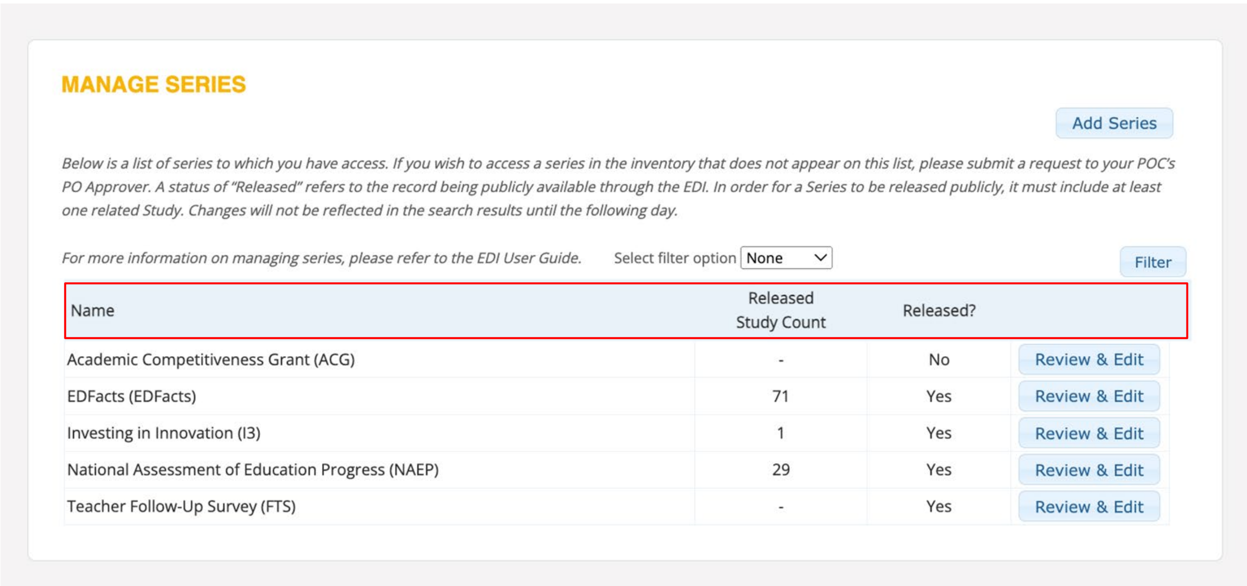
- **Update Contact:** Saves the edited information
- **Delete Contact:** Removes the contact from the EDI
- **Cancel:** Discards the changes and leave the contact's information as is

Manage Series

A series is a group of studies or collections conducted by the Department of Education (ED), associated with the Office of Management & Budget (OMB) data collection package. To navigate to the *Manage Series* page, click the **Admin** button on the Navigation Bar, and select the **Manage Series** link.

The *Manage Series* page has a table with the following columns:

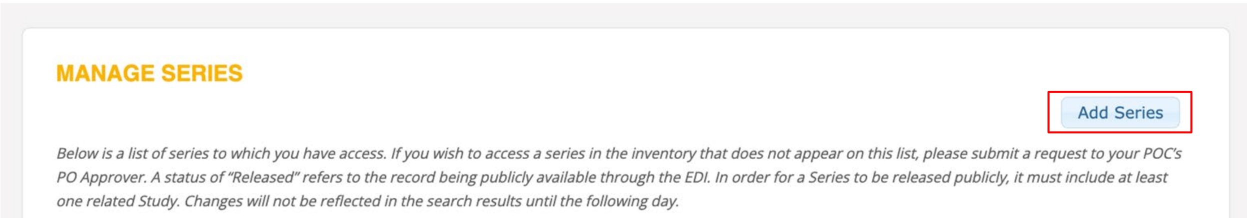
- **Name:** All series assigned to you listed in alphabetical order.
- **Released Study Count:** The number of released studies associated with the series.
- **Released?:** Displays "Yes" or "No" to indicate whether or not the series has completed the EDI Record Review Process and been approved.
  - *Note: This column **does not** indicate that the series is publicly available on the EDI site.*



From the *Manage Series* page, you have the ability to **Add Series**, **Filter**, and **Review & Edit** by clicking on the appropriate button.

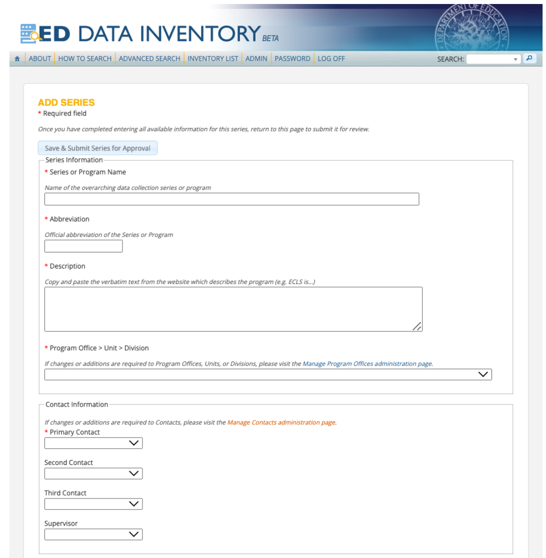
Add Series

Within the EDI record hierarchy, series is the highest level and therefore the preliminary item that must be created or added. To add a series, click the **Add Series** button at the top-right side of the *Manage Series* page.



Clicking on the **Add Series** button will redirect you to the *Add Series* page. The following fields are required as denoted with a red asterisk:

- **Series or Program Name:** Text field to provide the name of the series or program
- **Abbreviation:** Text field for the official abbreviation of the series or program
- **Description:** Text field for the verbatim text from the website which describes the program
- **Program Office > Unit > Division:** Drop-down populated by records created on the *Manage Program Office* page
- **Primary Contact:** Drop-down populated by records created on the *Manage Contacts* page



NOTE: The series or program will be assigned for review to the individual selected from the ***Preferred Approver*** *drop-down. If your preferred approver is not listed, email EDI@anlar.com to request the person be added.*

Once all information has been completed, you can click one of the following buttons:

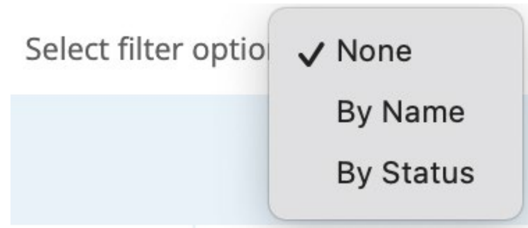
- **Save & Approve Series:** Saves the information entered and notifies the person selected in the **Primary Contact** drop-down
- **Save & Add Study:** Saves the information and redirects you to the *Studies* page
- **Cancel:** Discards information entered and redirects you back to the *Manage Series* page

Filter Series

When landing on the *Manage Series* page, you will see all of the studies that you have been assigned. However, you have the option to filter the table by name or status by using the provided fields and selecting the **Filter** button at the top of the table.

To filter the table by the series **Name**:

1. From the *Select filter option* drop-down, select **By Name**
2. Type the series name into the provided textbox
3. Click the **Filter** button



To filter the table by the series **Released?** status:

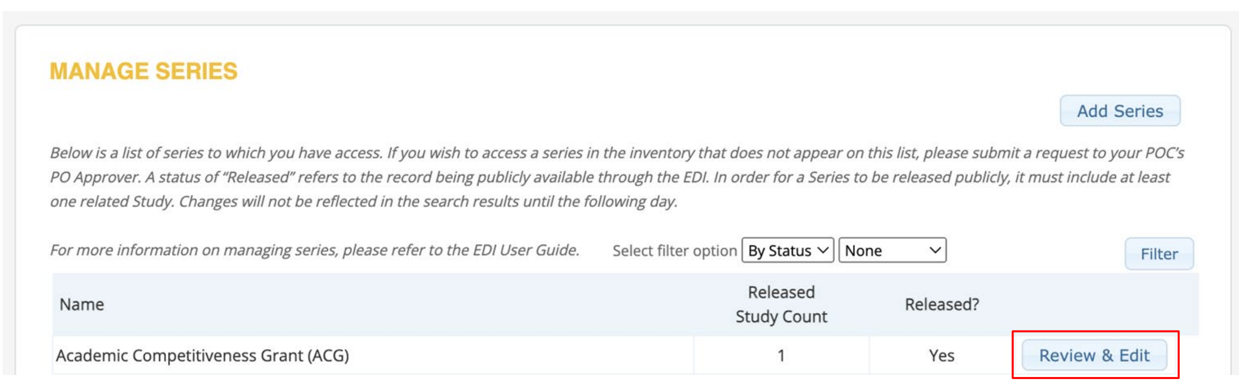
1. From the *Select filter option* drop-down, select **By Status**
2. From the additional drop-down that appears, select **Released** or **Unreleased**
3. Click the **Filter** button

To remove the selected filter and go back to viewing all of the series assigned to you:

1. Select **None** from the provided drop-downs
2. Click the **Filter** button

Review & Edit Series

Within the EDI record hierarchy, series is the highest level and therefore the preliminary item that must be created or added. To edit an existing series, click the **Review & Edit** button associated with the series you want to edit.



The following fields are required as denoted with a red asterisk:

- **Series or Program Name:** Text field to provide the name of the series or program
- **Abbreviation:** Text field for the official abbreviation of the series or program
- **Description:** Text field for the verbatim text from the website which describes the program
- **Program Office > Unit > Division:** Drop-down populated by records created on the *Manage Program Office* page

- **Primary Contact:** Drop-down populated by records created on the *Manage Contacts* page

*NOTE: The series or program will be assigned for review to the individual selected from the **Preferred Approver** drop-down. If your preferred approver is not listed, email EDI@anlar.com to request the person be added.*

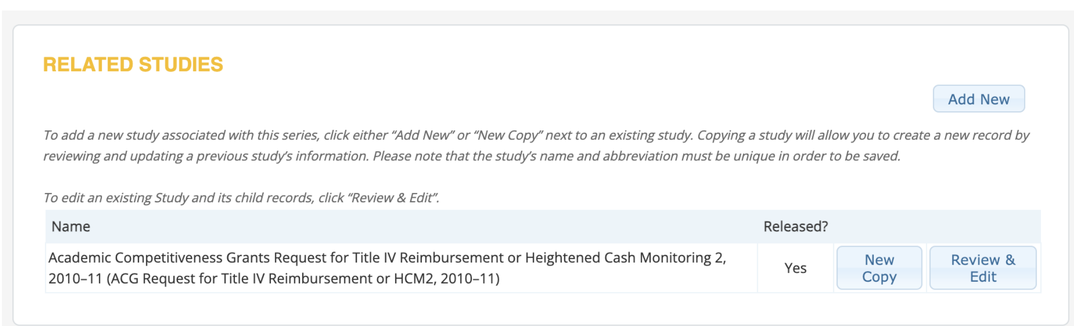
Once all information has been completed, you have the following options:

- **Add Comment:** Opens a textbox to add comments to the series
- **Save:** Saves the information and leaves you on the *Edit Series* page
- **Return to Workflow Admin Page:** Redirects you to the *Series Workflow* page without saving changes
- **Cancel:** Discards information entered and redirects you back to the *Manage Series* page

Related Studies

When a given series is saved, viewed, or edited, the list of associated studies is displayed at the bottom of the *Edit Series* page. The *Related Studies* section provides the following options:

- **Add New:** Clicking the button redirects you to the *Add Study* page
- **New Copy:** Clicking the button redirects you to the *Copy Study* page and pre-fills the page with the information from the copied study
- **Review & Edit:** Clicking the button redirects you to the *Edit Study* page for the associated study

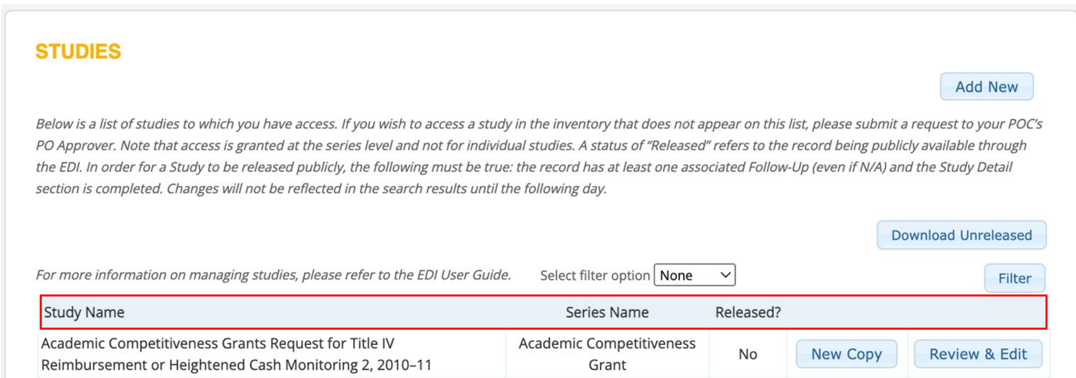


Manage Studies

A study is a single implementation of the collection (or series). For example, a grant program may conduct an annual data collection. The program collection is the series, while each time the collection is conducted (in this case annually), it is listed as a study.

To navigate to the *Studies* page, click the **Admin** button on the Navigation Bar, and select the **Manage Studies** link. The *Studies* page has a table with the following columns:

- **Study Name:** All existing studies assigned to you
- **Series Name:** All existing series assigned to you in alphabetical order
- **Released?:** Displays "Yes" or "No" to indicate whether or not the study has completed the EDI Record Review Process and been approved

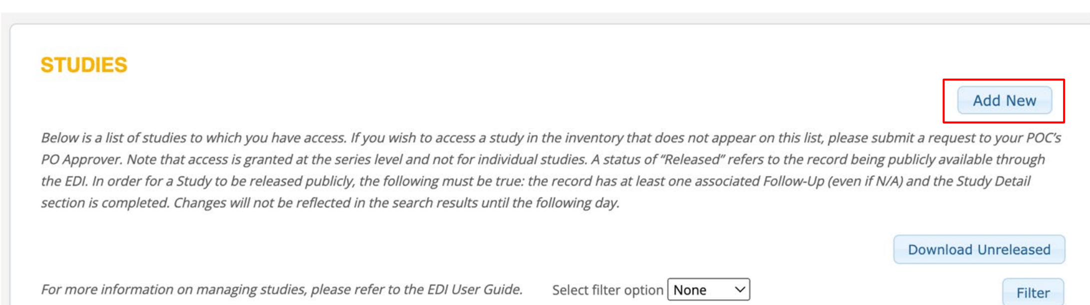


*NOTE: The Released? column **does not** indicate that the study is publicly available on the EDI site; to determine if a study is publicly available, navigate to a study's Edit Study Details page and scroll to the Available Analysis Level section of the page. If Public or Restricted Public was selected from the Public Access Level drop-down and the **Could be Public?** checkbox is checked, the study is publicly available.*

From the *Manage Studies* page, you have the ability to **Add New**, **Download Unreleased**, **Filter**, and ***Review & Edit*** by clicking on the appropriate button.

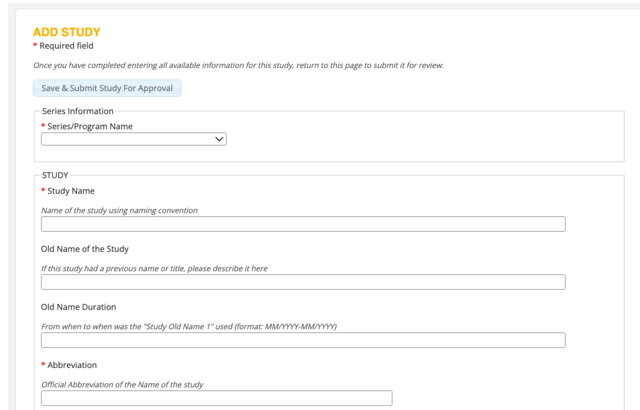
Add New Study

To add a study from the *Studies* page, click the **Add New** button at the top-right side of the *Studies* page.



Clicking on the **Add New** button will redirect you to the *Add Study* page. The following fields are required as denoted with a red asterisk:

- **Series/Program Name**: Drop-down list to choose from the series assigned to you
- **Study Name**: Text field to provide the name of the study
- **Abbreviation**: Text field for the official abbreviation of the study
- **Summary**: Text field for the structured abstract of the study as a whole
- **Frequency**: Text field to document the frequency the study continues to be undertaken



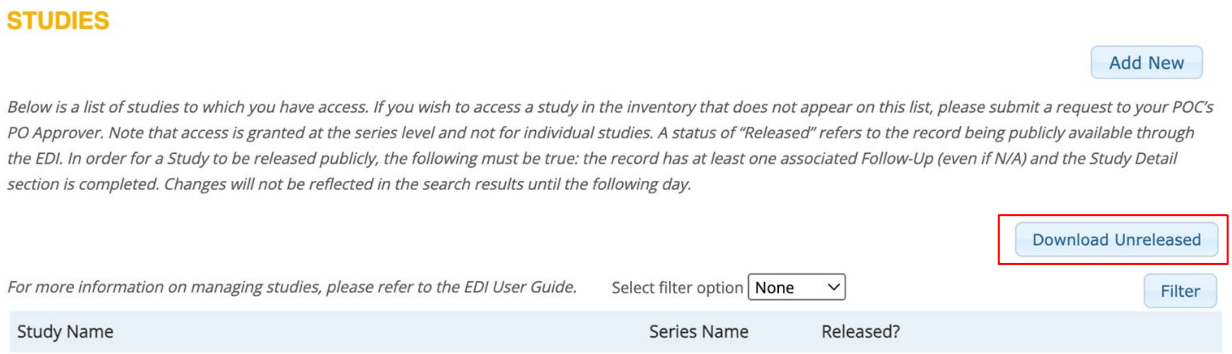
When adding a new study, you must choose an existing series from the *Series/ Program Name* drop-down to which the study will be assigned; if a new study is added via its series page, this field will be automatically populated.

Once all information has been completed, you can click one of the following buttons:

- **Save & Approve Study:** Saves the information entered and changes the status to "*Pending System Admin Approval*"
- **Save & Add Follow-Up/Dataset:** Saves the information and displays the *Follow-Ups and Additional Study Information (Required)* and *Dataset & File Metadata (Optional)* sections at the bottom of the page
- **Cancel:** Discards information entered and redirects you back to the *Studies* page

Download Unreleased Studies

To download a list of unreleased studies from the *Studies* page, click the **Download Unreleased** button at the top-right side of the *Studies* page. Clicking the button will download an Excel file of the unreleased studies onto your computer.

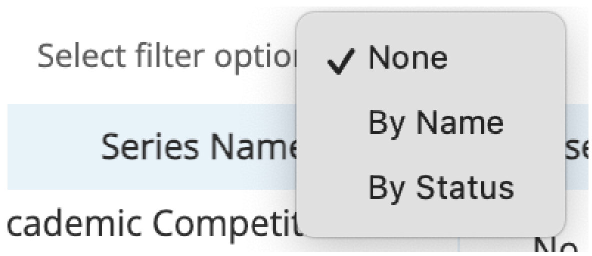


Filter Studies

When landing on the *Studies* page, you will see all of the studies that you have been assigned. However, you have the option to filter the table by name or status by using the provided fields and selecting the **Filter** button at the top of the table.

To filter the table by the study **Names**:

1. From the *Select filter option* drop-down, select **By Name**
2. Type the study's name into the provided textbox
3. Click the **Filter** button



To filter the table by the study **Released?** statuses:

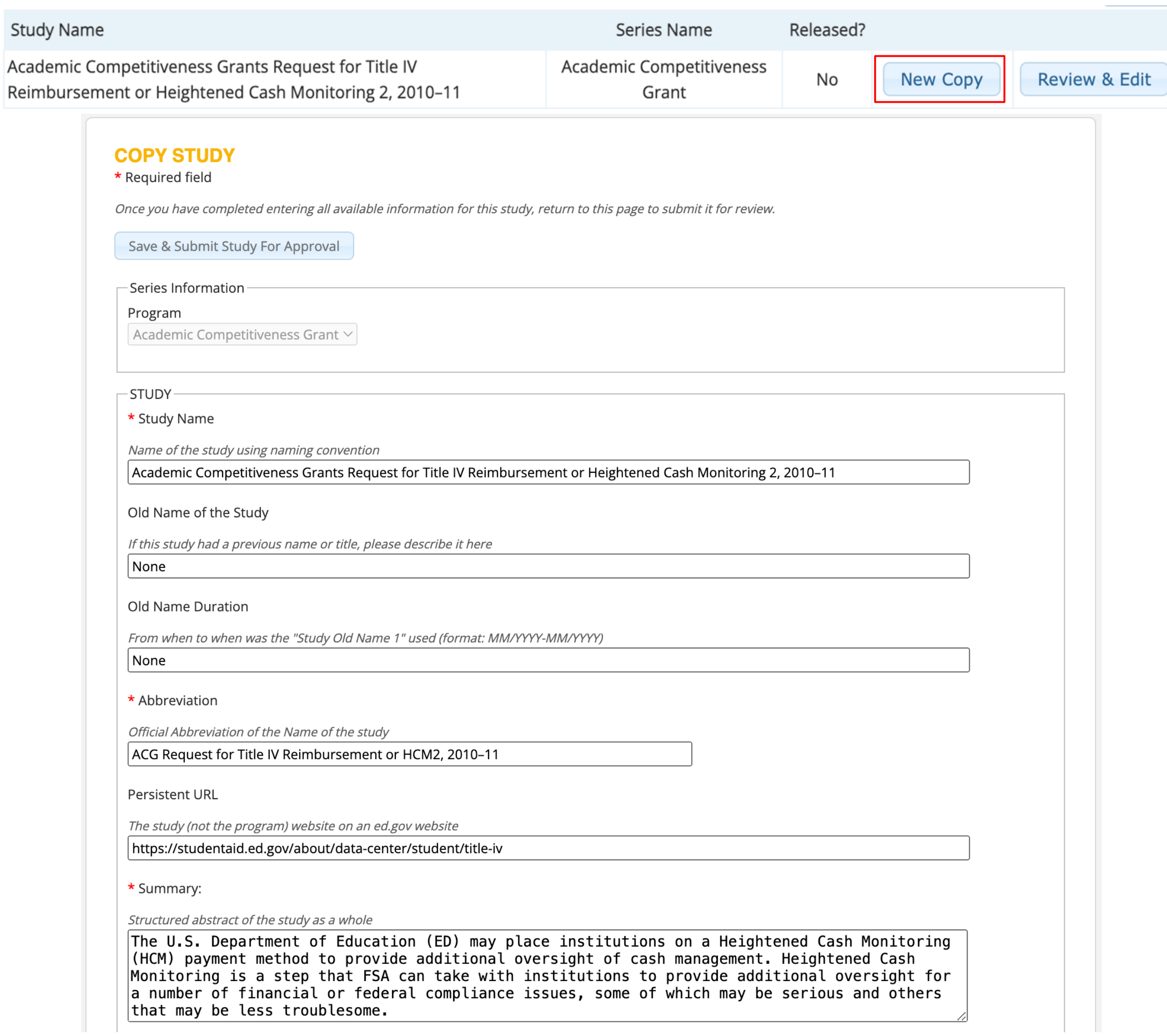
1. From the *Select filter option* drop-down, select **By Status**
2. From the additional drop-down that appears, select **Released** or **Unreleased**
3. Click the **Filter** button

To remove the selected filter and go back to viewing all of the series assigned to you:

1. Select **None** from the provided drop-downs
2. Click the **Filter** button

New Copy of a Study

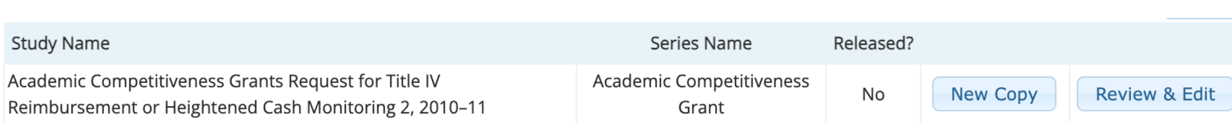
Each study on the *Studies* page has an associated **New Copy** button; clicking the button redirects you to the *Copy Study* page and pre-fills the page with the information from the copied study.



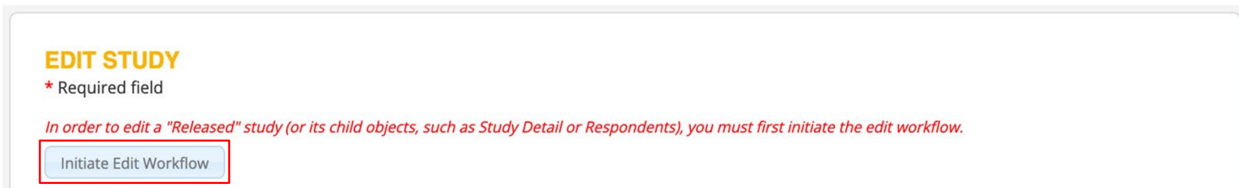
NOTE: When copying an existing study, at a minimum, you must enter a non-duplicate study name and abbreviation prior to submitting for approval.

Review & Edit Studies

Each study on the *Studies* page has an associated **Review & Edit** button; clicking the button redirects you to the *Edit Study* page that is pre-filled with the study's previously saved information.

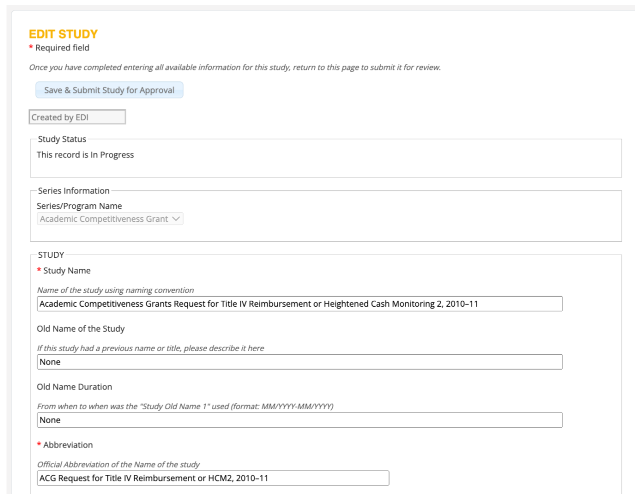


*NOTE: Studies marked with "No" in the <u>Released?</u> column will remain editable, while those marked as released will be read-only. To make changes to the released studies (or any associated child objects), you must click the **Initiate Edit Workflow** button at the top of the <u>Edit Study</u> page (see screenshot below).*



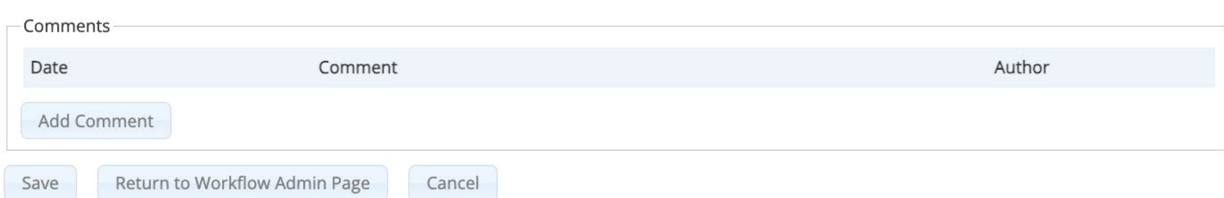
The following fields are required as denoted with a red asterisk:

- **Study Name:** Text field to provide the name of the study
- **Abbreviation:** Text field for the official abbreviation of the study
- **Summary:** Text field for the structured abstract of the study as a whole
- **Frequency:** Text field to document the frequency the study continues to be undertaken



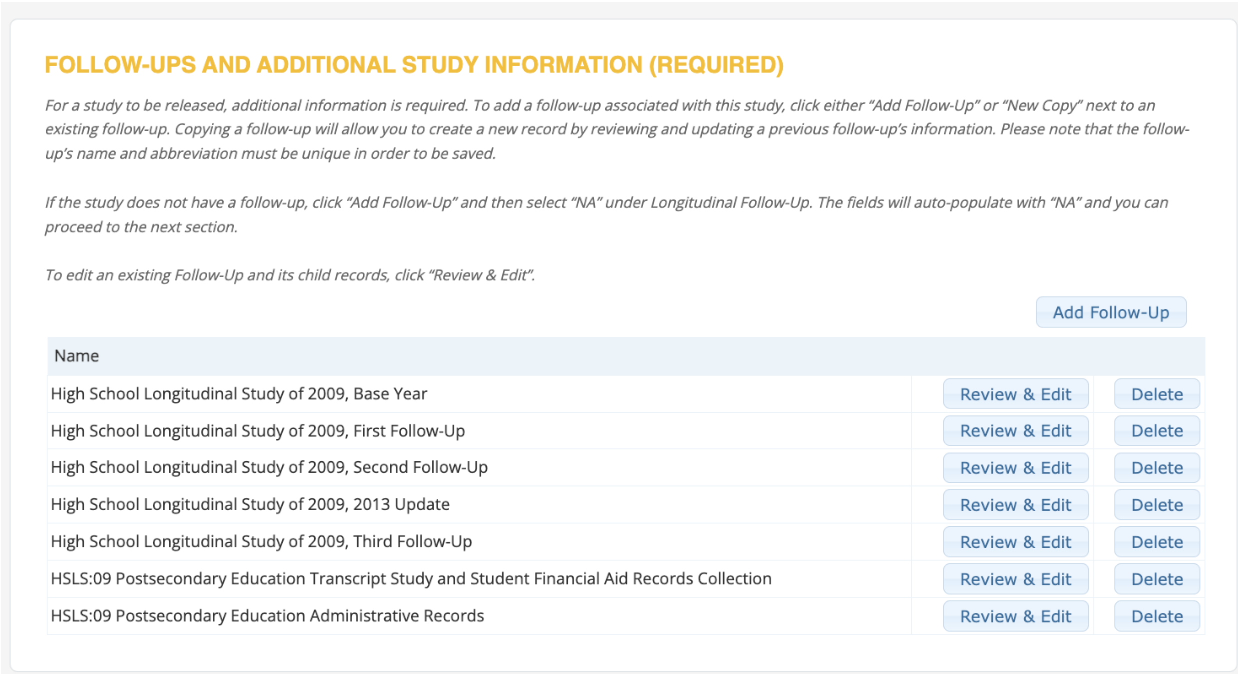
Once all information has been reviewed and/or edited, you have the following options:

- **Add Comment:** Opens a textbox to add comments to the study
- **Save:** Saves the progress before moving on
- **Return to Workflow Admin Page:** Redirects you to the *Series Workflow* page without saving any changes
- **Cancel:** Discards information entered and redirects you back to the *Studies* page



Follow-Ups and Additional Study Information (Required)

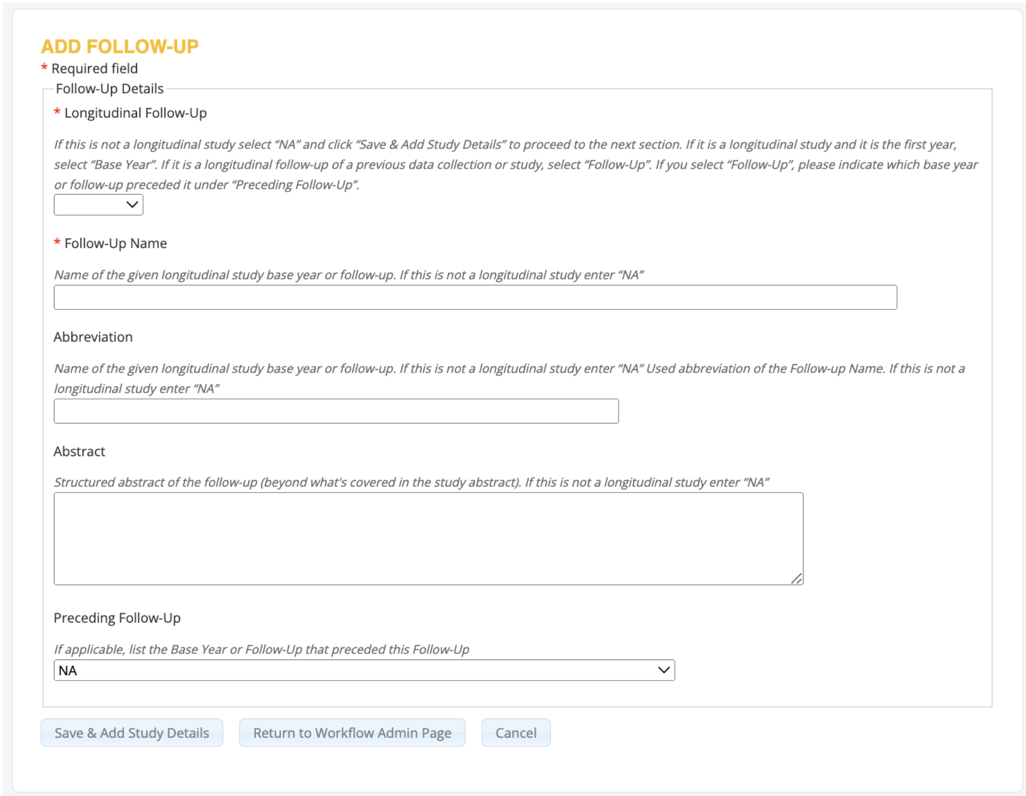
Once a study has been saved, one or more follow-ups can be added to it. In the *Follow-Ups and Additional Study Information (Required)* section at the bottom of the *Edit Study* page, add a follow-up by clicking the **Add Follow-Up** button; it is most common for longitudinal studies to add multiple follow-ups.



*NOTE: If any follow-ups have been previously saved, they can be edited by clicking the associated **Review & Edit** button, or you may delete an obsolete or incorrect follow-up by clicking the **Delete** button associated with the appropriate follow-up row.*

Clicking **Add Follow-Up** will redirect you to the *Add Follow-Up* page; the following fields are required as denoted with a red asterisk:

- **Longitudinal Follow-Up**: A drop-down to document if the follow-up being recorded is the *Base Year*, *Follow-up*, or *NA*
  - *NA* records that the study is not longitudinal
- **Follow-Up Name**: Text field to document the name of the given longitudinal study base year or follow-up
  - Field will auto-populate with *NA* if *NA* is selected from the **Longitudinal Follow-Up** drop-down



*NOTE: If the study **<u>does not</u>** have a follow-up, you still must click **Add Follow-Up** and then select NA for **Longitudinal Follow-Up**; save the progress before moving on to <u>Study Details</u>.*

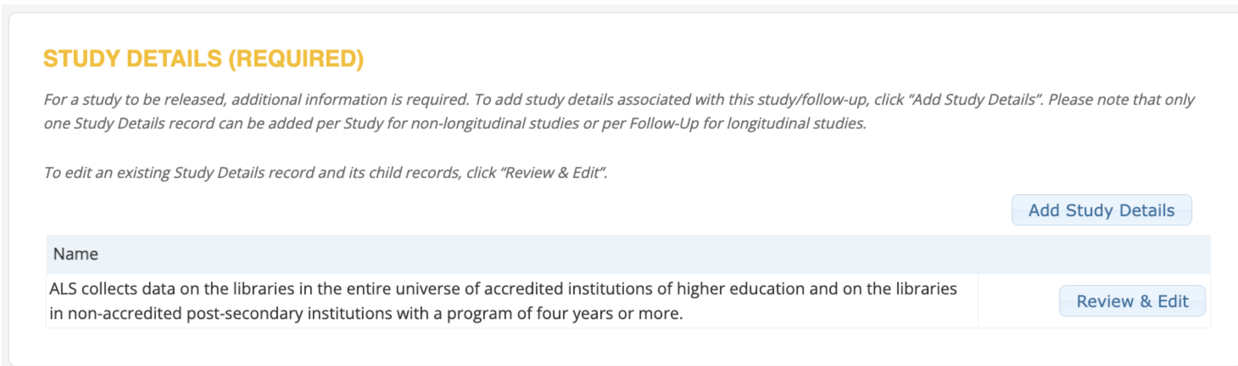
Once all follow-up information has been added, reviewed, and/or edited, you have the following options:

- **Save & Add Study Details:** Available when adding new follow-ups; saves the follow-up information and opens the *Study Details (Required)* section on the *Edit Follow-Up* page
- **Return to Workflow Admin Page:** Redirects you to the *Series Workflow* page without saving any changes
- **Cancel:** Discards information entered and redirects you back to the *Edit Study* page
- **Add Comment:** Only available once the follow-up is saved; opens a textbox to add comments to the study
- **Save:** Only available once the follow-up is saved; saves any edited/added information and leaves you on the *Edit Follow-Up* page
- **Save & Return to Study:** Only available once the follow-up is saved; saves any edited information and redirects you to the *Edit Study* page

Study Details

Once a follow-up has been saved, study details can be added to it. In the *Study Details* section at the bottom of the *Edit Follow-Up* page, study details can be added by clicking the **Add Study Details** button. If an existing study detail has already been added, you are able to edit the details by clicking the **Review & Edit** button.

NOTE: Each follow-up should only have one associated Study Details record.



STUDY DETAILS (REQUIRED)

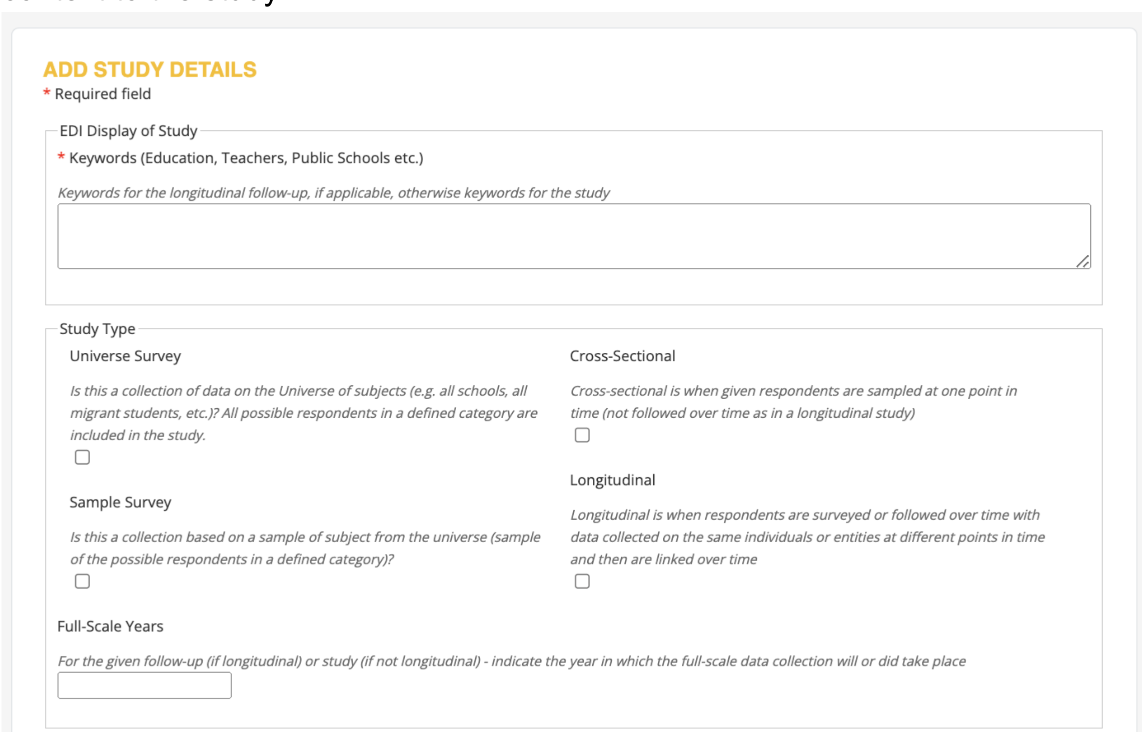
For a study to be released, additional information is required. To add study details associated with this study/follow-up, click "Add Study Details". Please note that only one Study Details record can be added per Study for non-longitudinal studies or per Follow-Up for longitudinal studies.

To edit an existing Study Details record and its child records, click "Review & Edit".

Add Study Details

Name	
ALS collects data on the libraries in the entire universe of accredited institutions of higher education and on the libraries in non-accredited post-secondary institutions with a program of four years or more.	Review & Edit

The *Study Details* page offers the user the opportunity to add a significant level of context to the study.



ADD STUDY DETAILS

* Required field

EDI Display of Study

* Keywords (Education, Teachers, Public Schools etc.)

Keywords for the longitudinal follow-up, if applicable, otherwise keywords for the study

Study Type

Universe Survey

Is this a collection of data on the Universe of subjects (e.g. all schools, all migrant students, etc.)? All possible respondents in a defined category are included in the study.

Sample Survey

Is this a collection based on a sample of subject from the universe (sample of the possible respondents in a defined category)?

Cross-Sectional

Cross-sectional is when given respondents are sampled at one point in time (not followed over time as in a longitudinal study)

Longitudinal

Longitudinal is when respondents are surveyed or followed over time with data collected on the same individuals or entities at different points in time and then are linked over time

Full-Scale Years

For the given follow-up (if longitudinal) or study (if not longitudinal) - indicate the year in which the full-scale data collection will or did take place

Although there are dozens of fields with which to add associated study details, only the following fields are required as denoted with a red asterisk:

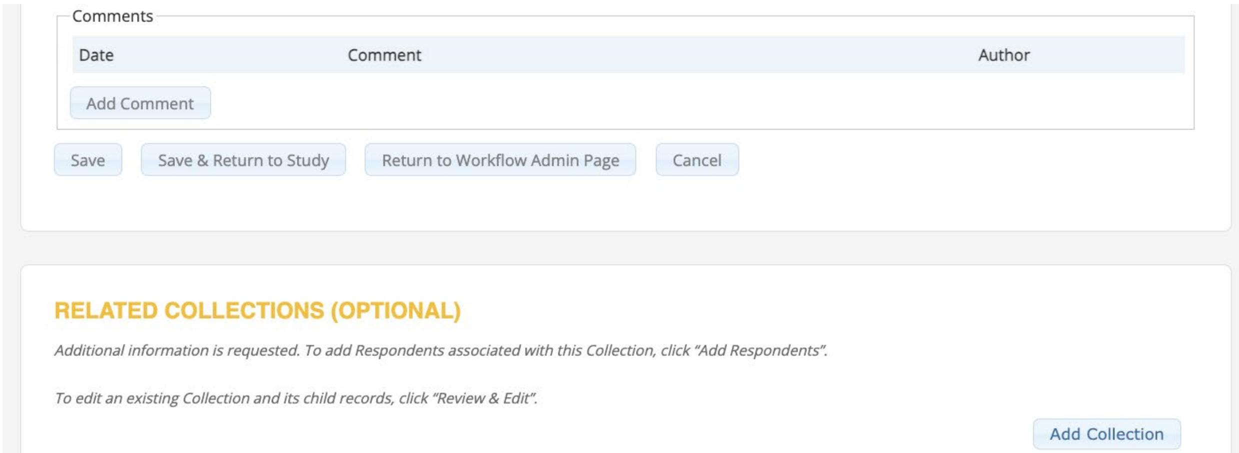
- **Keywords**: Text field for longitudinal follow-up key words
- **Subject Population Detail**: Text field to provide a short description of who or what the study is about
- **Publication Date (Stats)**: Date field to document when the first data will be published
- **Publication Type (Stats)**: Text field to indicate the type of report used to publish the first statistics
- **Publication URL (Stats)**: Text field for the ed.gov web address for the first published statistics
- **Publication Date (Data)**: Date field for when manipulable data will first be published
- **Publication URL (Data)**: Text field for main ed.gov address with the first manipulable data
- **Public Access Level**: Drop-down to document the current public access status of the published dataset(s)
- **Bureau Code**: Text field to document the system bureau code assigned by OMB for the office responsible for the data collection
- **Program Code**: Text field to document the system program code assigned by OMB for the activities organized under the data collection
- **Restricted-Use Date**: Date field to document when restricted data will become available
  - *NA* checkbox is to document if the full-scale study will not release a restricted use file

NOTE: Review the [Department of Education Program Codes](#) for more information regarding bureau and program codes.

Once all study details have been added, reviewed, and/or edited, you have the following options:

- **Save & Add Collection:** Available when adding new study details; saves the follow-up information and opens the *Related Collections (Optional)* section on the *Add Study Details* page
- **Return to Workflow Admin Page:** Redirects you to the *Series Workflow* page without saving any changes
- **Cancel:** Discards information entered and redirects you back to the *Edit Follow-Up* page
- **Add Comment:** Only available once the study details are saved; opens a textbox to add comments to the study
- **Save:** Only available once the study details are saved; saves any edited/added information and leaves you on the *Study Details* page

- **Save & Return to Study:** Only available once the follow-up is saved; saves any edited information and redirects you to the *Edit Study* page

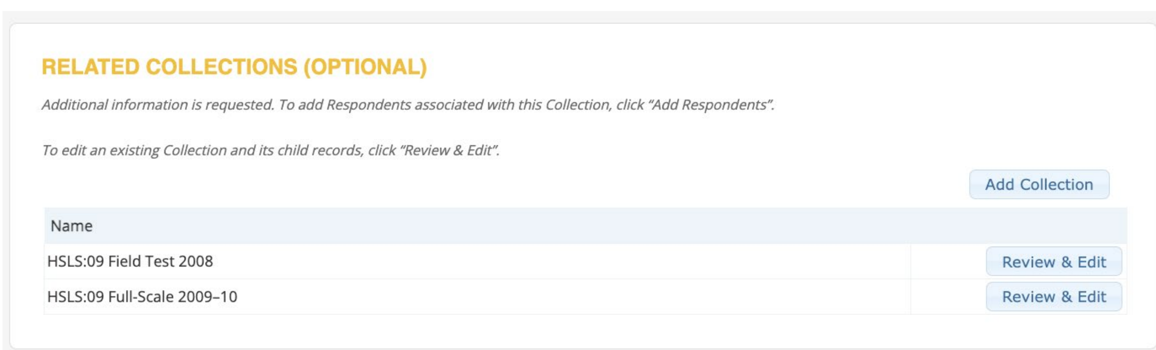


Related Collections

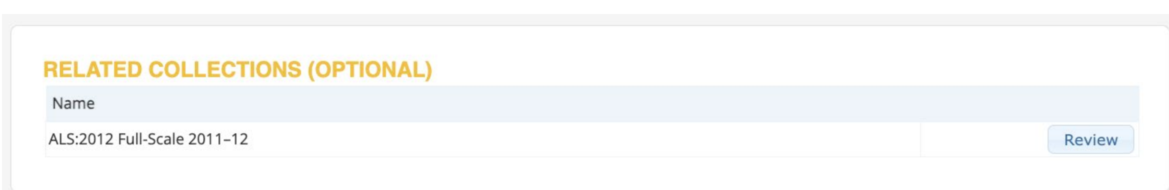
Once study details have been saved, related collections can be added to the study.

NOTE: Adding Related Collections is optional.

In the *Related Collections (Optional)* section at the bottom of the *Edit Study Details* page, add a collection by clicking the **Add Collection** button. If collections have already been added, the user may also edit an existing collection by clicking the collection's associated **Review & Edit** button.

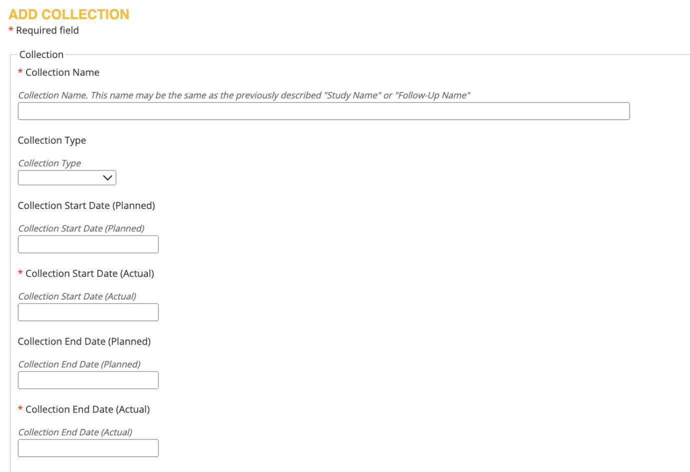


*NOTE: For studies in a "Released" status, only "Review" will show on the **Related Collections** button.*



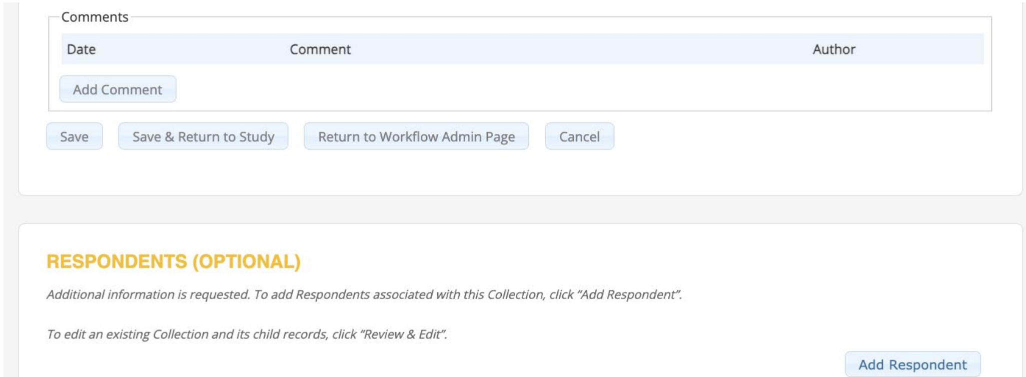
Clicking on **Add Collection** will redirect you to the *Add Collection* page that gathers data on a given collection within a study/follow-up and provides the opportunity to track relevant dates pertinent to the collection. The following fields are required as denoted with a red asterisk:

- **Collection Name**: Text field to document the name of the collection
- **Collection State Date (Actual)**: Date field to document the collection start date
- **Collection End Date (Actual)**: Date field to document the collection end date



Once all related collection details have been added, reviewed, and/or edited, you have the following options:

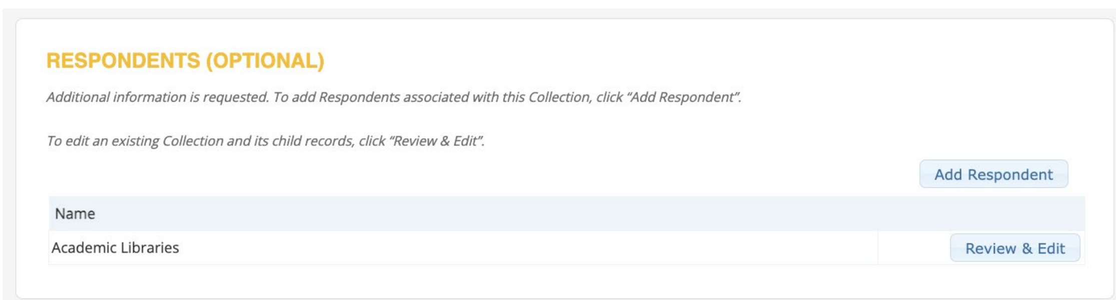
- **Save & Add Respondent:** Available when adding new collection details; saves the collection information and opens the *Respondents (Optional)* section on the *Add Study Details* page
- **Return to Workflow Admin Page:** Redirects you to the *Series Workflow* page without saving any changes
- **Cancel:** Discards information entered and redirects you back to the *Edit Study Details* page
- **Add Comment:** Only available once the collection is saved; opens a textbox to add comments to the study
- **Save:** Only available once the collection is saved; saves any edited/added information and leaves you on the *Edit Collection* page
- **Save & Return to Study:** Only available once the collection is saved; saves any edited information and redirects you to the *Edit Study* page



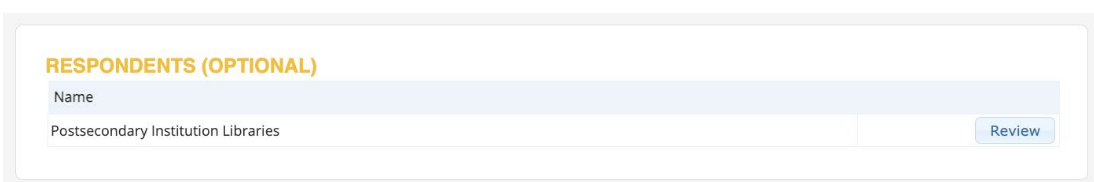
Respondents

Once a related collection has been saved, respondents can be added.

In the *Respondents (Optional)* section at the bottom of the *Edit Collection* page, add respondent details by clicking the **Add Respondent** button. If respondents have already been added, you may also edit an existing respondent record by clicking the **Review & Edit** button for the appropriate respondent row that needs to be edited.



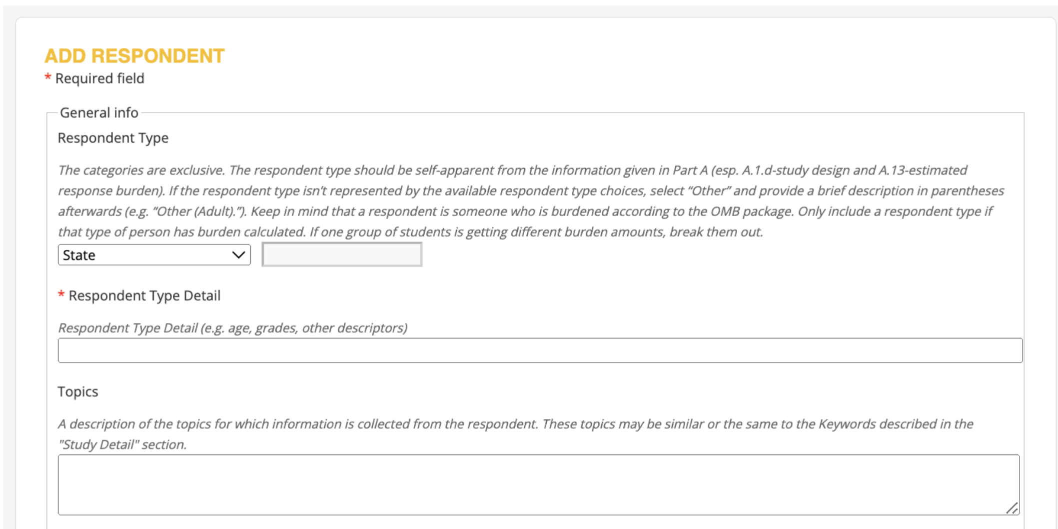
NOTE: For studies in a "Released" status, only "Review" will show on the ***Respondents*** *button.*



Clicking on **Add Respondent** will redirect you to the *Add Respondent* page; this page provides the ability to enter detailed information regarding the respondent type. The following fields are required as denoted by a red asterisk:

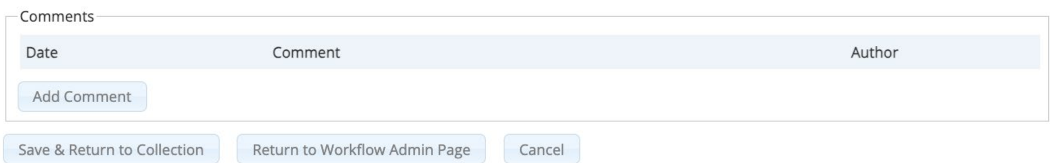
- **Respondent Type Detail**: Text field to document details about the type of respondent

- **Actual Sample Size**: Two fields to document the actual number in the sample of the given respondent type
    - Drop-down with the following options: *Value*, *TBD*, *Unavailable*, and *NA*
    - Text field to type in the number
- **Response Rate Actual**: Two fields to document the actual number of respondents for the given respondent type
    - Drop-down with the following options: *Value*, *TBD*, *Unavailable*, and *NA*
    - Text field to type in the number



Once all respondent information has been added, reviewed, and/or edited, you have the following options:

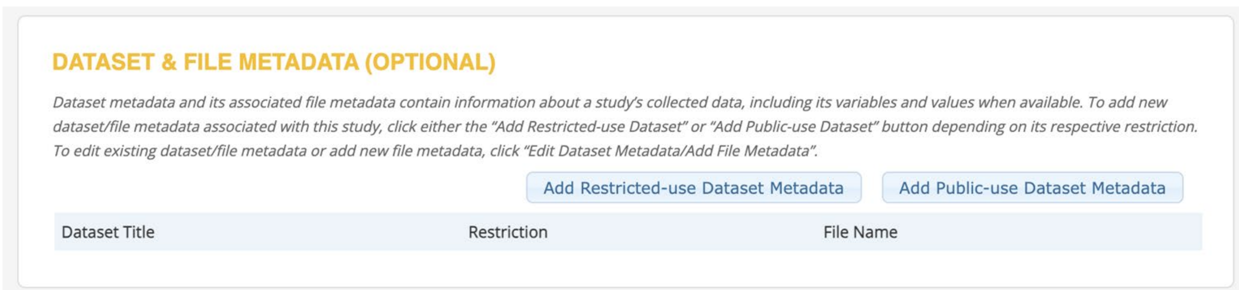
- **Save & Return to Collection:** Saves the respondent information and redirects you to the *Related Collections* page
- **Cancel:** Discards information entered and redirects you back to the *Edit Collection* page
- **Return to Workflow Admin Page:** Only available once the respondent information is saved; redirects you to the *Series Workflow* page without saving any changes
- **Add Comment:** Only available once the respondent information is saved; opens a textbox to add comments to the study



Once the record is complete, click the **Save & Approve Study** button at the top of the *Edit Study* page**.** Go to [Submitting for Review] for more information.

Dataset & File Metadata

Once a study has been saved, the *Dataset & File Metadata (Optional)* section will display at the bottom of the *Edit Study* page, and restricted-use and public-use datasets can be added. In the *Dataset & File Metadata (Optional)* section at the bottom of the *Edit Study* page, add a dataset by clicking the **Add Restricted-use Dataset Metadata** button or the **Add Public-use Dataset Medatada** button. You may also edit an existing dataset by clicking the dataset's associated **Edit Dataset Metadata/Add File Metadata** button.

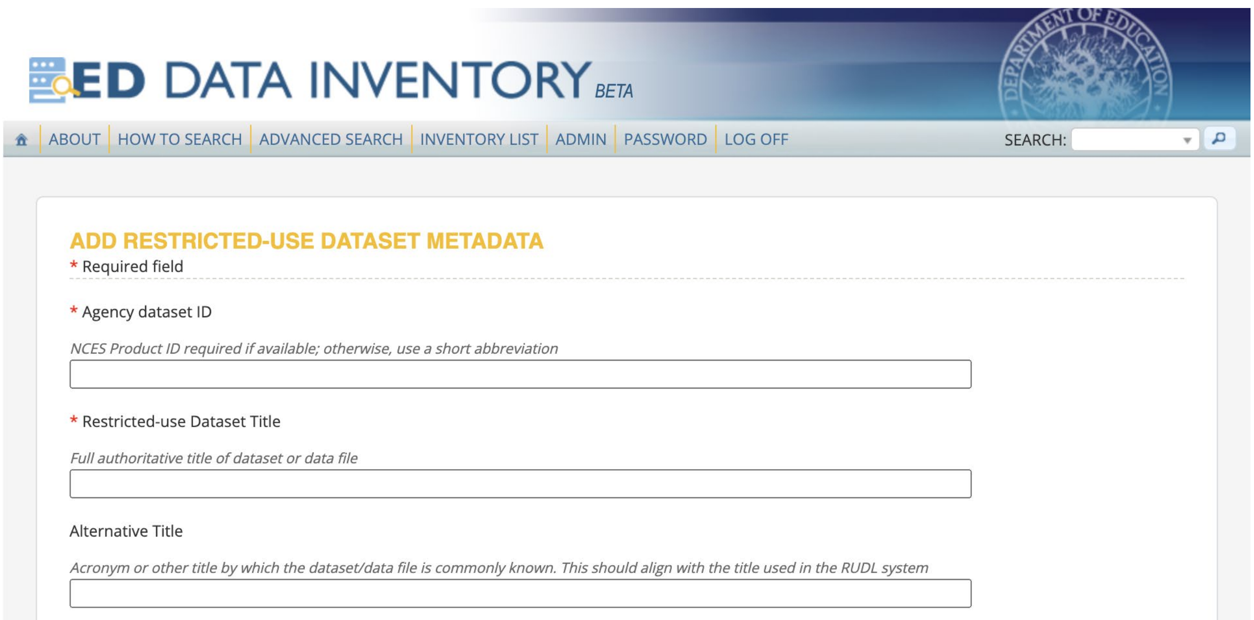


Add Restricted-Use Dataset Metadata

Clicking on the **Add Restricted-Use Dataset Metadata** button will redirect you to the *Add Restricted-use Dataset Metadata* page. The following fields are required as denoted with a red asterisk:

- **Agency Dataset ID**: Text field for the NCES Product ID if available or a short abbreviation
- **Restricted-use Dataset Title**: Text field for the full authoritative title of the dataset
- **Description Abstract**: Text field for providing a descriptive summary of what is contained in the data
- **Years Available**: Text field for documenting the earliest to most recent data collection dates requestable for the dataset
- **Universe**: Text field to record the group to whom the data can be generalized
- **Classifications**: Drop-down menu with checkboxes used to select the predominant subject matter(s)
- **Spatial Coverage**: Text field with the largest geographic area to which the data can be generalized; autofilled with United States

- **Unit of Observation(s)**: Drop-down menu with checkboxes used to select what a “case” row represents
- **Smallest Geographic Unit**: Drop-down menu with checkboxes used to select the smallest geographic area to which descriptions can be made
- **Sample**: Text field to provide information about the number of units included, how the sample was selected, what sampling frame was used, etc.
- **Method of Data Collection**: Drop-down menu with checkboxes used to select how the data were collected and/or the source of the information
- **Access Modality**: Drop-down menu with checkboxes used to select where the data can be accessed
- **Can non-citizens apply?**: Drop-down to document if and to what extent non-citizens can apply
- **Variable selection requirement**: Drop-down to document if there is or is not a variable selection requirement



Once all restricted-use dataset metadata has been added, reviewed, and/or edited, choose the **Save & Add File** button to save your progress. Afterwards, you will have the following options:

- **Add Comment:** Only available once the restricted-use metadata is saved; opens a textbox to add comments to the restricted-use metadata
- **Save:** Only available once the restricted-use metadata is saved; saves any edited/added information and leaves you on the *Edit Restricted-Use Dataset Metadata* page

- **Save & Return to Study:** Only available once the restricted-use metadata is saved; saves any edited information and redirects you to the *Edit Study* page
- **Return to Workflow Admin Page:** Redirects you to the *Series Workflow* page without saving any changes
- **Cancel:** Discards information entered and redirects you back to the *Edit Study* page

Add Restricted-Use File Metadata

Once restricted-use metadata information has been saved, you can add file information by clicking on the **Add Restricted-use File Metadata** button in the *Restricted-Use File Metadata* section at the bottom of the *Edit Restricted-Use Dataset Metadata* page. Clicking the button will redirect you to the *Add Restricted-Use File Metadata* page. The following fields are required as denoted with a red asterisk:

- **Official File Title**: Text field to document the official name designated by NCES
- **Restricted Use File Name**: Text field to document the readable name of the file
- **Restricted Use File Description**: Text field to document a short description of what the data in the file describes
- **Available Formats**: Text field to document the formats in which the data is available for use

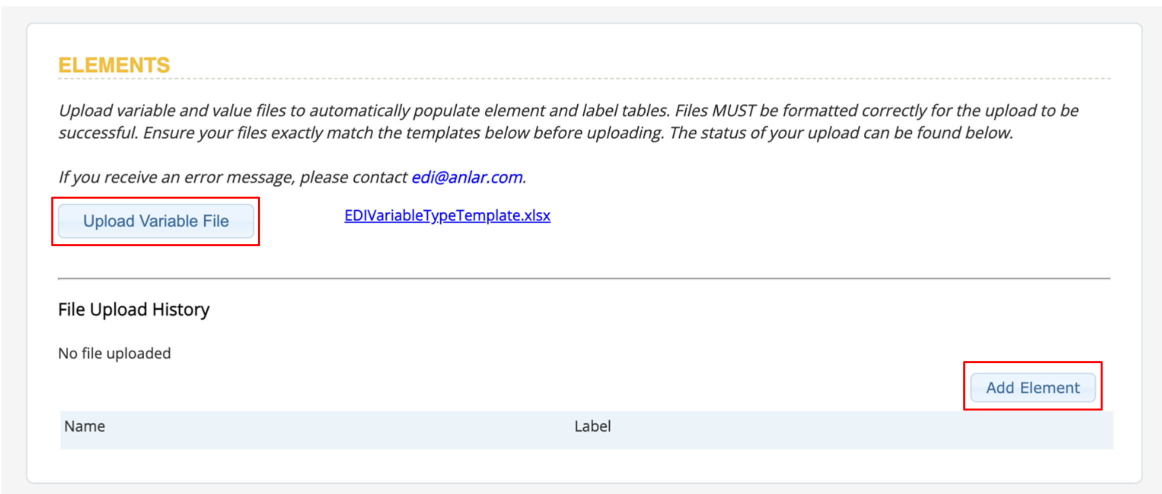
Once all file metadata has been added, reviewed, and/or edited, you have the following options:

- **Save & Add Element:** Saves the restricted-use file metadata information and displays an *Elements* section at the bottom of the page
- **Cancel**: Discards information entered and redirects you back to the *Edit Restricted-Use Dataset Metadata* page

Elements (Restricted-Use)

Once restricted-use file metadata information has been saved, you can add metadata elements in the Elements section at the bottom of the *Edit Restricted-Use File Metadata* page. You can add element information two ways:

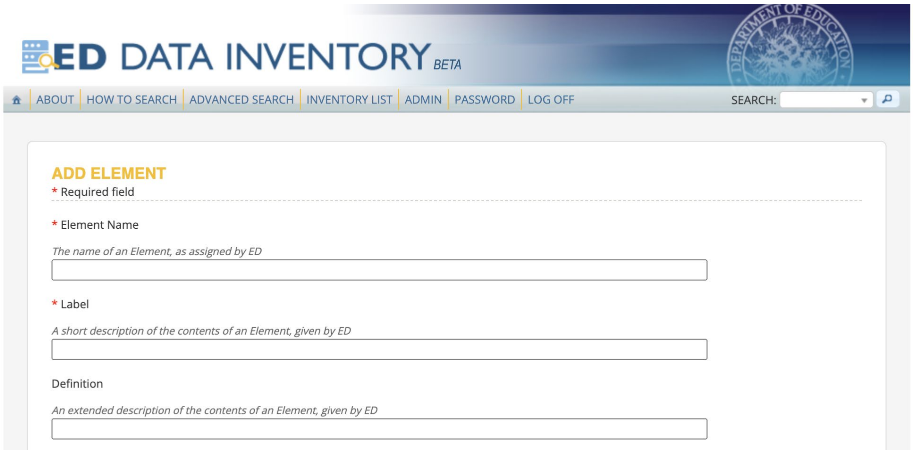
- Click on the **Upload Variable File** button to upload an Excel spreadsheet
- Click on the **Add Element** button to enter element information manually



*NOTE: You can download a template by clicking on the **DIVariableTypeTemplate.xlsx** link.*

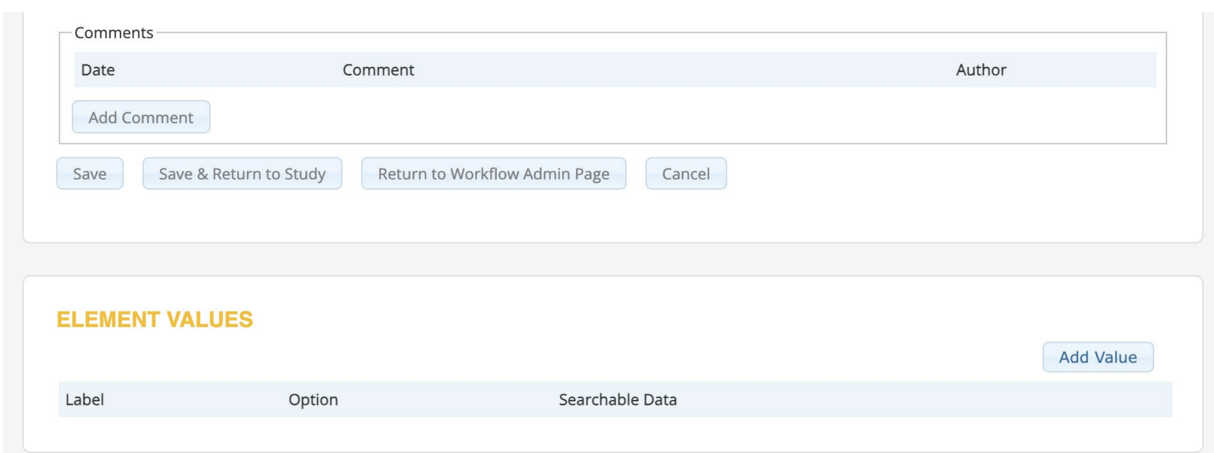
The following columns/fields are required:

- **Element Name:** Text column/field for the ED-assigned name of the element
- **Label:** Text column/field for a short description of the contents of the element, given by ED
- **Type:** Text column/field for the type of element



Once element has been uploaded/added, you have the following options:

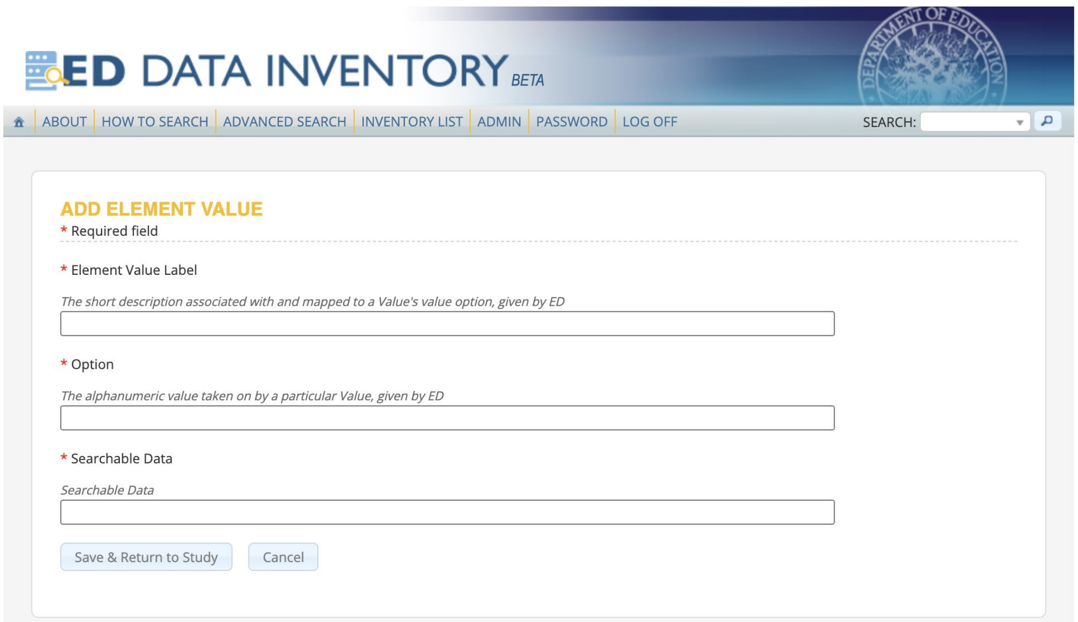
- **Save & Add Value:** Saves the element information and displays an *Elements Values* section at the bottom of the page
- **Cancel:** Discards information entered and redirects you back to the *Edit Restricted-Use File Metadata* page
- **Add Comment:** Only available once the element is saved; opens a textbox to add comments to the restricted-use file metadata
- **Save:** Only available once the element is saved; saves any edited/added information and leaves you on the *Edit Restricted-Use File Metadata* page
- **Save & Return to Study:** Only available once the element is saved; saves any edited information and redirects you to the *Edit Study* page
- **Return to Workflow Admin Page:** Only available once the element is saved; redirects you to the *Series Workflow* page without saving any changes



Element Values (Restricted-Use)

Once an element has been saved, you can add values by clicking on the **Add Value** button that will now display in the *Element Values* section at the bottom of the page; you will be redirected to the *Add Element Value* page. The following fields are required:

- **Element Value Label**: Text field for a short description associated with and mapped to a value's value option (given by ED)
- **Option**: Text field for an alphanumeric value taken on by a particular value (given by ED)
- **Searchable Data**: Text field to record searchable data

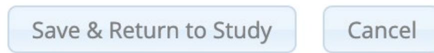


NOTE: You can also access the Element Values Excel template by clicking on the ***EDIValueFileTemplate.xlsx*** *link in the Elements section of the Edit Restricted-Use File Metadata page; you can directly upload a values Excel spreadsheet into the EDI by clicking on the* ***Upload Value File*** *button in the Elements section of the Edit Restricted-Use File Metadata page.*

Once information has been entered, you have the following options:

- **Save & Return to Study:** Saves the element value information and redirects you back to the *Edit Study* page

- **Cancel:** Discards information entered and redirects you back to the *Edit Element* page

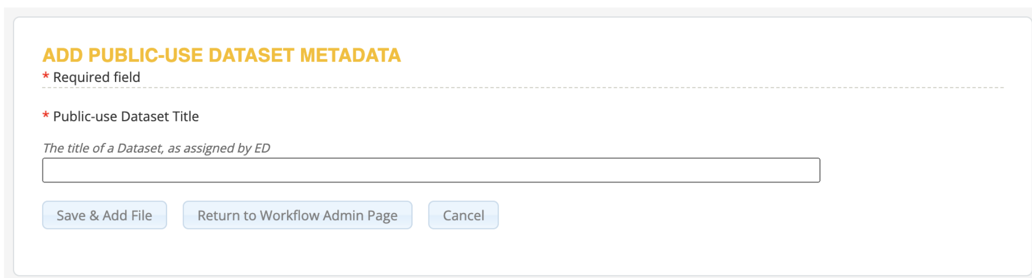


Add Public-Use Dataset Metadata

Clicking on the **Add Public-use Dataset Metadata** button will redirect you to the *Add Public-Use Dataset Metadata* page.

The following fields are required as denoted with a red asterisk:

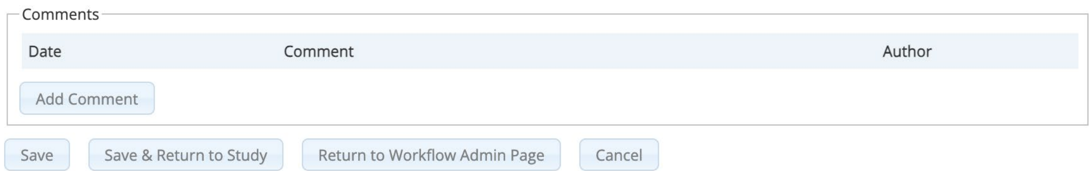
- **Public-use Dataset Title**: Text field to document the ED-assigned title of the dataset



Once all public-use dataset metadata has been added, reviewed, and/or edited, you have the following options:

- **Save & Add File:** Saves the public-use dataset metadata information and displays a *Public-Use File Metadata* section at the bottom of the page
- **Return to Workflow Admin Page:** Redirects you to the *Series Workflow* page without saving any changes
- **Cancel:** Discards information entered and redirects you back to the *Edit Study* page
- **Add Comment:** Only available once the public-use metadata is saved; opens a textbox to add comments to the restricted-use metadata
- **Save:** Only available once the public-use metadata is saved; saves any edited/added information and leaves you on the *Edit Public-Use Dataset Metadata* page

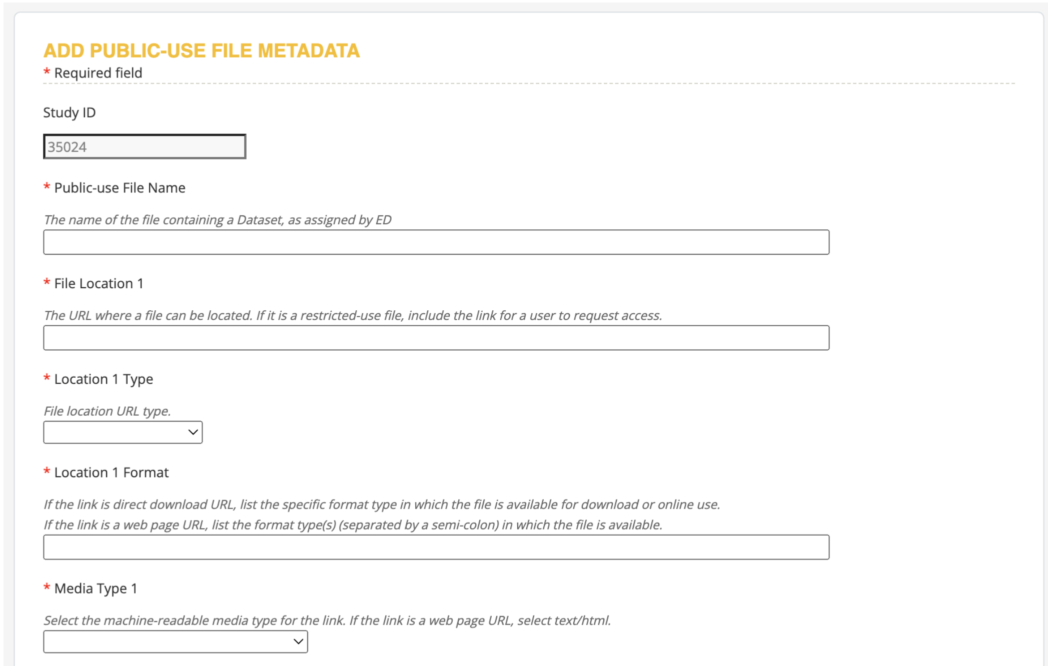
- **Save & Return to Study:** Only available once the public-use metadata is saved; saves any edited information and redirects you to the *Edit Study* page



Add Public-Use File Metadata

Once public-use metadata information has been saved, you can add file information by clicking on the **Add Public-use File Metadata** button in the *Public-Use File Metadata* section at the bottom of the *Edit Public-Use Dataset Metadata* page. Clicking the button will redirect you to the *Add Public-Use File Metadata* page. The following fields are required as denoted with a red asterisk:

- **Public-use File Name**: Text field to document the ED-assigned name of the file containing the dataset
- **File Location 1**: Text field to document the URL where a file can be located
- **Location 1 Type**: Drop-down to document the file location URL type
- **Location 1 Format**: Text field to document the format types in which the file is available
- **Media Type 1**: Drop-down to document the machine-readable media type for the link
- **Location 1 Detail**: Text field to document further details of the file's location



NOTE: You provide up to four locations for a file; typically, you want to be able to provide multiple locations if a file is available for direct download in different formats. When adding more than one location, be sure to enter all the variables for the location number so it can be properly included.

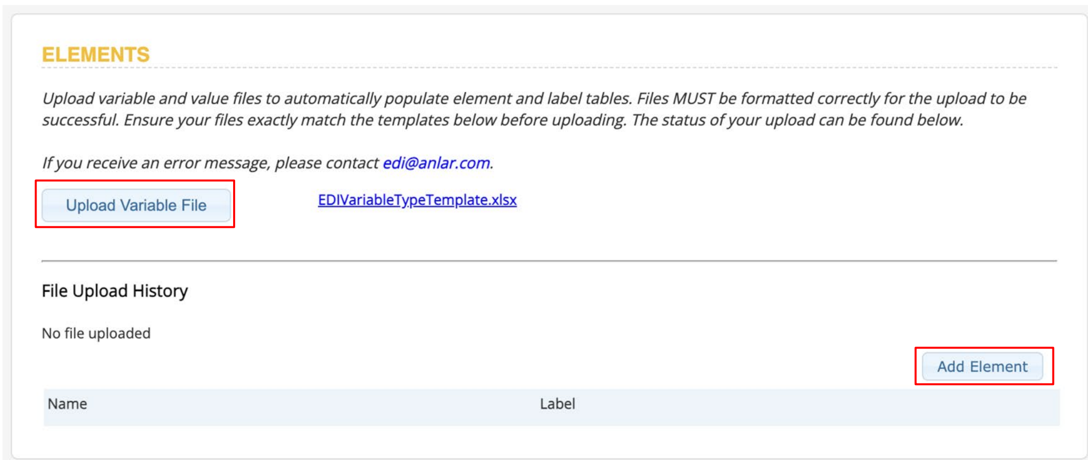
Once all file metadata has been added, reviewed, and/or edited, you have the following options:

- **Save & Add Element:** Saves the public-use file metadata information and displays an *Elements* section at the bottom of the page
- **Cancel:** Discards information entered and redirects you back to the *Edit Public-Use Dataset Metadata* page
- **Add Comment:** Only available once the public-use file metadata is saved; opens a textbox to add comments to the public-use file metadata
- **Save:** Only available once the public-use metadata is saved; saves any edited/added information and leaves you on the *Edit Public-Use File Metadata* page
- **Save & Return to Study:** Only available once the public-use file metadata is saved; saves any edited information and redirects you to the *Edit Study* page
- **Return to Workflow Admin Page:** Only available once the public-use file metadata is saved; redirects you to the *Series Workflow* page without saving any changes

Elements (Public-Use)

Once public-use file metadata information has been saved, you can add metadata elements in the *Elements* section at the bottom of the *Edit Public-Use File Metadata* page. You can add element information two ways:

- Click on the **Upload Variable File** button to upload an Excel spreadsheet
- Click on the **Add Element** button to enter element information manually



*NOTE: You can download a template by clicking on the **DIVariableTypeTemplate.xlsx** link.*

The following columns/fields are required:

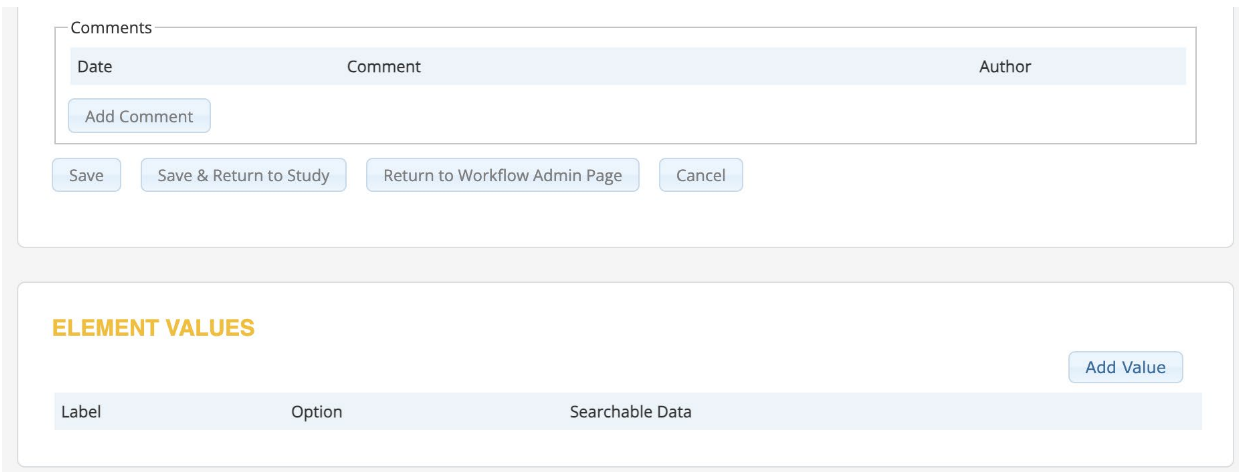
- **Element Name**: Text column/field for the ED-assigned name of the element
- **Label**: Text column/field for a short description of the contents of the element, given by ED
- **Type**: Text column/field for the type of element

Once element has been uploaded/added, you have the following options:

- **Save & Add Value:** Saves the element information and displays an *Element Values* section at the bottom of the page
  - Note that clicking **Save & Add Value** button will also add the following

options to the *Elements* section of the *Edit Public-Use File Metadata* page
    - **Upload Value File button**
    - **EDIValueFileTemplate.xlsx link**

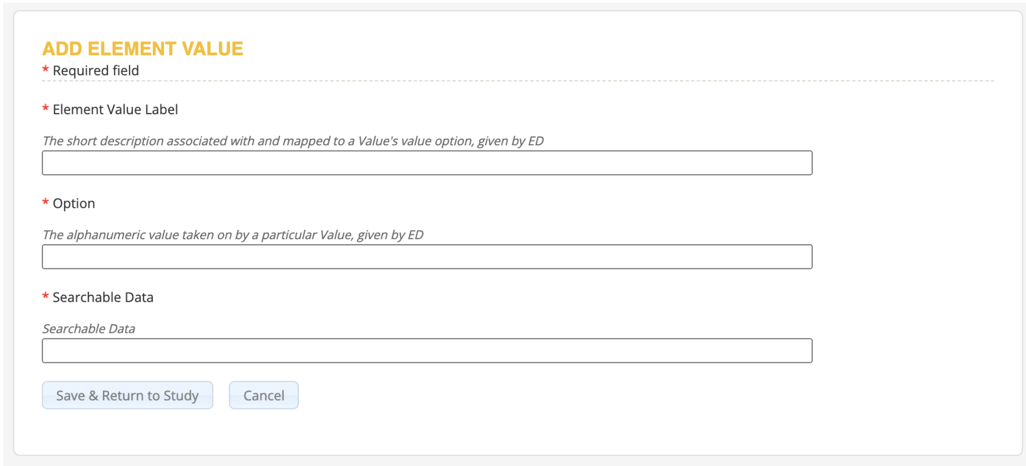
- **Cancel:** Discards information entered and redirects you back to the Edit Public-Use File Metadata page
- **Add Comment:** Only available once the element is saved; opens a textbox to add comments to the public-use file metadata
- **Save:** Only available once the element is saved; saves any edited/added information and leaves you on the Edit Element page
- **Save & Return to Study:** Only available once the element is saved; saves any edited information and redirects you to the Edit Study page
- **Return to Workflow Admin Page:** Only available once the element is saved; redirects you to the *Series Workflow* page without saving any changes



Element Values (Public-Use)

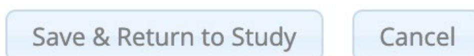
Once an element has been saved, you can add values by clicking on the **Add Value** button that will now display in the *Element Values* section at the bottom of the page; you will be redirected to the *Add Element Value* page. The following fields are required:

- **Element Value Label**: Text field for a short description associated with and mapped to a value's value option (given by ED)
- **Option**: Text field for an alphanumeric value taken on by a particular value (given by ED)
- **Searchable Data**: Text field to record searchable data



*NOTE: You can also access the Element Values Excel template by clicking on the **EDIValueFileTemplate.xlsx** link in the Elements section of the Edit Public-Use File Metadata page; you can directly upload a values Excel spreadsheet into the EDI by clicking on the **Upload Value File** button in the Elements section of the Edit Public-Use File Metadata page.*

Once information has been entered, you have the following options:



- **Save & Return to Study:** Saves the element value information and redirects you back to the *Edit Study* page
- **Cancel:** Discards information entered and redirects you back to the *Edit Element* page

Once the record is complete, click the **Save & Approve Study** button**.** Go to [Submitting for Review] for more information.

Manage Program Offices

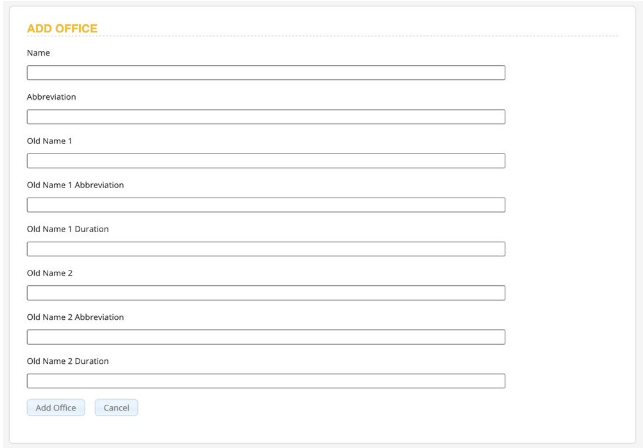
The **Manage Program Offices** link on the *Site Administration* page will redirect you to the *Manage Program Office* page where you can view and modify existing Program Offices and their child unit(s) and division(s). Program Offices are listed in alphabetical order and can be added at any time, as they represent the parent record in a three-level hierarchy; only units and divisions reside below program offices in this hierarchy.

*NOTE: The programs listed are used to populate the **Program Office > Unit > Division** drop-down on the Add Series page.*

Add Program Office

You can add a program office by clicking the **Add Office** button at the top of the *Manage Program Offices* page and being redirected to the *Add Office* page. The following fields are available:

- **Name**
- **Abbreviation**
- **Old Name 1**
- **Old Name 1 Abbreviation**
- **Old Name 1 Duration**
- **Old Name 2**
- **Old Name 2 Abbreviation**
- **Old Name 2 Duration**



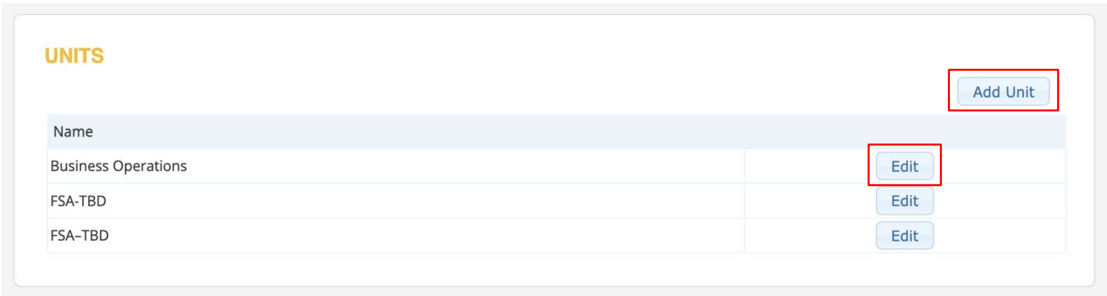
Once program office information has been added, you have the following options:

- **Add Office:** Saves the information and displays a *Units* section at the bottom of the page
- **Cancel:** Discards information entered and redirects you to the *Manage Program Offices* page

Add Units

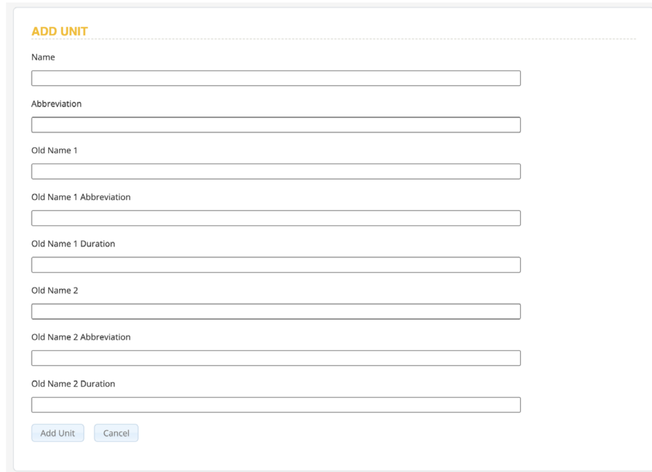
A unit is defined as a group or section within a program office. Examples include NCES as a unit within IES or OSS within the OESE. A unit can be added after its associated program office has been added; multiple units can exist under one program office. You can add a unit by clicking the **Add Unit** button at the bottom of the *Edit Office* page.

*NOTE: You may also edit an existing unit by clicking the **Edit** button.*



Clicking on the **Add Unit** button will redirect you to the *Add Unit* page. The following fields are available:

- **Name**
- **Abbreviation**
- **Old Name 1**
- **Old Name 1 Abbreviation**
- **Old Name 1 Duration**
- **Old Name 2**
- **Old Name 2 Abbreviation**
- **Old Name 2 Duration**



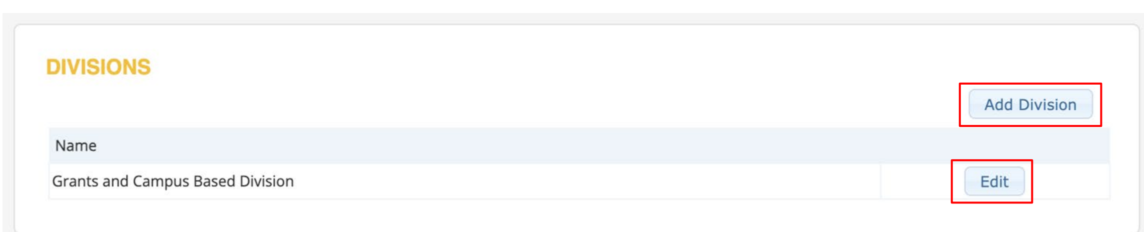
None of the fields on the *Add Unit* page are required. Once unit information has been added, you have the following options:

- **Add Unit:** Saves the information and displays a *Divisions* section at the bottom of the page
- **Cancel:** Discards information entered and redirects you to the *Edit Office* page

Add Division

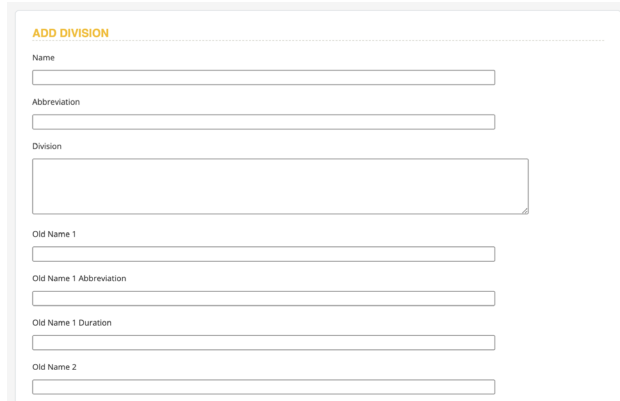
A division is contained within a unit, which may refer to a specific program or a group within the previously defined unit. Examples include the Sample Surveys Division within NCES or the Assessment Functional Support Team within OSS. A division can be added after a unit has been added; multiple divisions can exist under a unit. You can add a division by clicking the **Add Division** button at the bottom of the *Edit Unit* page.

*NOTE: You may also edit an existing division by clicking the **Edit** button.*



Clicking on the **Add Division** button will redirect you to the *Add Division* page. The following fields are available:

- **Name**
- **Abbreviation**
- **Division**
- **Old Name 1**
- **Old Name 1 Abbreviation**
- **Old Name 1 Duration**
- **Old Name 2**
- **Old Name 2 Abbreviation**
- **Old Name 2 Duration**



None of the fields on the *Add Division* page are required. Once division information has been added, you have the following options:

- **Add Division:** Saves the information and redirects you to the *Edit Unit* page
- **Cancel:** Discards information entered and redirects you to the *Edit Unit* page

Edit Program Office

You can edit an existing program office by clicking the office's associated **Edit** button; functionality works the same as when you are adding a new office, unit, and/or division.

Manage EDGE JSON

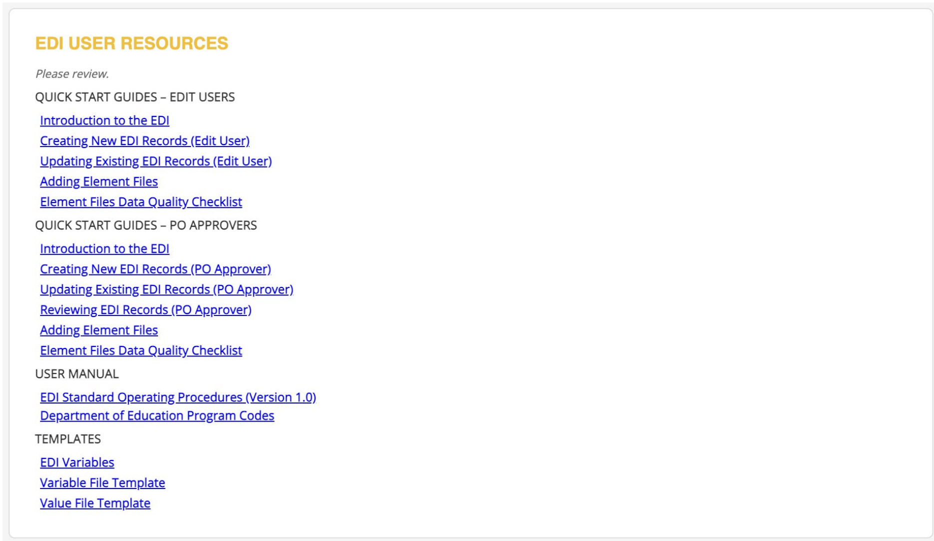
The **Manage EDGE JSON** link on the *Site Administration* page will deliver you to the *Manage EDGE JSON* page; this page should only be accessed and edited by members of the NCES EDGE team.

On this page, members of the NCES EDGE team can update and save changes to its JSON text file. Text saved in the Edit EDGE JSON field is automatically appended to the EDI's database JSON extract and published for federal reporting purposes.

A *Modification Log* at the bottom of the page displays a table with *Name* and *Date* columns that records edits to the EDGE JSON.

EDI User Resources

The **EDI User Resources** link on the *Site Administration* page will deliver you to the *EDI User Resources* page; this page provides links where you can access the latest versions of EDI resources and templates.

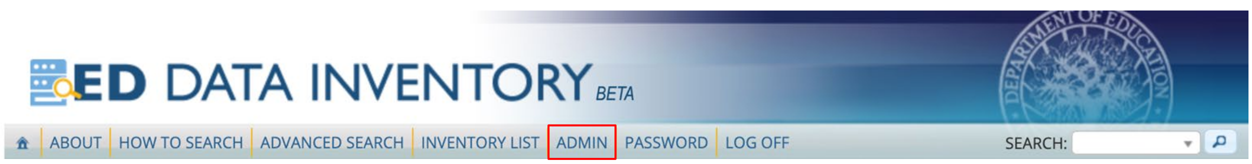


EDI Records

The ED Data Inventory (EDI) allows those with the Program Office (PO) Approver User role to add EDI records as well as review and edit records assigned to them.

Adding New EDI Records

You can begin the process of adding a study or series from the **Admin** button located on the Navigation Bar.

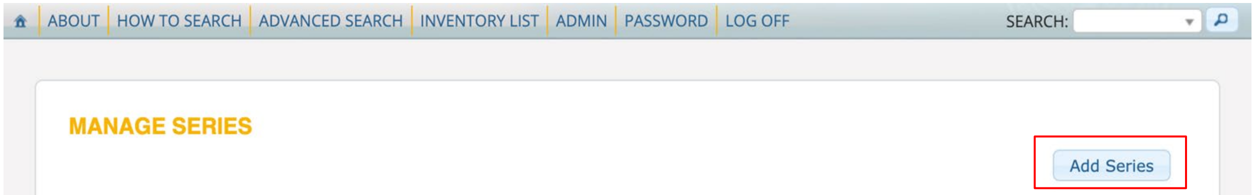


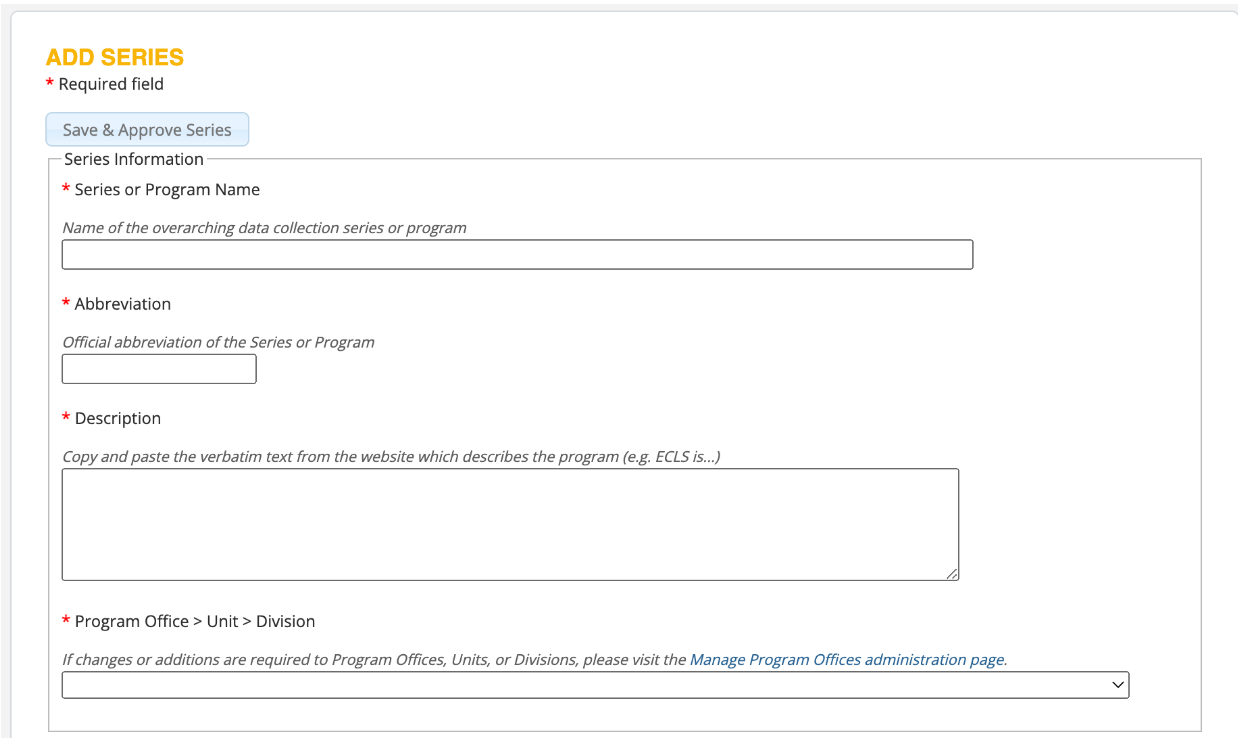
*NOTE: You must be logged in to access the **Admin** button.*

Please refer to the PO Approver user version of the Creating EDI Records Quick Start Guides for detailed instructions.

Add Series

To add a series, click **Admin** on the Navigation Bar, and then select the **Manage Series** link on the *Site Administration* page; you will be redirected to the *Manage Series* page. Click on the **Add Series** button at the top of the *Manage Series* page to be redirected to the *Add Series* page.





NOTE: You must complete the required fields as denoted by a red asterisk; however, completion of as many fields as possible creates a better catalog.

To navigate away from the page before submitting the record, click **Save & Add Study** at the bottom of the page; the series' status will be set to "*In Progress*". Once the record is complete, click the **Save & Approve Series** button at the top of the page. The new series will enter the EDI Record Review Process, and the series' status will be set to "*Pending System Admin Approval*".

Add Study

A new study can be added from both the **Manage Series** and **Manage Studies** links on the *Site Administration* page.

NOTE: Only users with appropriate access to a series can add a study.

To add a study from *Manage Series*, follow the steps below:

1. Click on **Admin** in the Navigation Bar.
2. Click on the **Manage Series** link to be redirected to the *Manage Series* page.
3. Find the series under which the study will reside by scrolling through the list or using the filter feature.
    a. If you do see the series nor have access, apply for access by contacting EDI@anlar.com.
4. Click on the series' associated **Review & Edit** button to be redirected to the *Edit Series* page.
5. Scroll to the *Related Studies* section at the bottom of the *Edit Series* page.
6. Click on the **Add New** button to be redirected to the *Add Study* page.
    a. The *Series/Program Name* field will be auto-filled with the name of the series you selected.
7. Complete the required fields as denoted by a red asterisk.
    a. Completion of as many fields as possible creates a better catalog.
8. Once fields have been completed, you have the following options:
    a. **Save & Approve Study:** Button at the top of the page that adds the study to the EDI Record Review Process and updates the study's status to *"Pending System Admin Approval"*
    b. **Save & Add Follow-up/Dataset:** Button at the bottom of the page that saves any information entered, updates the status to *"In Progress"*, and displays the *Follow-ups and Additional Study Information* section at the bottom of the page
    c. **Cancel:** Discards information entered and redirects you back to the *Edit Series* page

To add a study from *Manage Studies*, follow the steps below:

1. Click on **Admin** in the Navigation Bar.
2. Click on the **Manage Studies** link to be redirected to the *Studies* page.
3. Click on the **Add New** button at the top of the page to be redirected to the *Add Study* page.
    a. The *Series/Program Name* drop-down will provide the series you have permission to access.
        i. If you do see the series under which the study will reside nor have access to it, apply for access by contacting EDI@anlar.com.
    b. Complete the required fields as denoted by a red asterisk.
        i. Completion of as many fields as possible creates a better catalog.
    c. Once fields have been completed, you have the following options:
        i. **Save & Approve Study:** Button at the top of the page that adds the study to the EDI Record Review Process and updates the study's status to *"Pending System Admin Approval"*

   ii. **Save & Add Follow-up/Dataset:** Button at the bottom of the page that saves any information entered, updates the status to *"In Progress"*, and displays the *Follow-ups and Additional Study Information* section at the bottom of the page
   iii. **Cancel:** Discards information entered and redirects you back to the *Studies* page

Copy Existing Study

You may choose to leverage data from an existing study to create a new one; copying a study can be initiated from both the *Edit Series* and *Studies* pages.

NOTE: Only users with appropriate access to a series can copy a study.

To copy a study from the *Edit Series* page, follow the steps below:

1. Click on **Admin** in the Navigation Bar.
2. Click on the **Manage Series** link to be redirected to the *Manage Series* page.
3. Find the series under which the study you want to copy resides by scrolling through the list or using the filter feature.
   a. If you do see the series nor have access, apply for access by contacting EDI@anlar.com.
4. Click on the series' associated **Review & Edit** button to be redirected to the *Edit Series* page.
5. Scroll to the *Related Studies* section at the bottom of the *Edit Series* page.
6. Click on the **New Copy** button to create a copy of the associated study and be redirected to the *Copy Study* page.
   a. The study's fields will be auto-filled with the information from the study you copied.
   b. Update the fields with the new study information.
      i. At a minimum, you must enter a non-duplicate study name and abbreviation prior to submitting for approval.
      ii. Required fields are denoted by a red asterisk.
      iii. Completion of as many fields as possible creates a better catalog.
   c. Once fields have been completed, you have the following options:
      i. **Save & Approve Study:** Button at the top of the page that adds the study to the EDI Record Review Process and updates the study's status to *"Pending System Admin Approval"*
      ii. **Save & Add Follow-up/Dataset:** Button at the bottom of the page that saves any information entered, updates the status to *"In*

Progress”, and displays the *Follow-ups and Additional Study Information* section at the bottom of the page
        iii. **Cancel:** Discards information entered and redirects you back to the *Edit Series* page

To copy a study from the *Studies* page, follow the steps below:

1. Click on **Admin** in the Navigation Bar.
2. Click on the **Manage Studies** link to be redirected to the *Studies* page.
3. Find the study you want to copy by scrolling through the list or using the filter feature.
    a. If you do see the study nor have access, apply for access by contacting EDI@anlar.com.
4. Click on the study’s associated **New Copy** button to be redirected to the *Copy Study* page.
    a. The study’s fields will be auto-filled with the information from the study you copied.
    b. Update the fields with the new study information.
        i. At a minimum, you must enter a non-duplicate study name and abbreviation prior to submitting for approval.
        ii. Required fields are denoted by a red asterisk.
        iii. Completion of as many fields as possible creates a better catalog.
    c. Once fields have been completed, you have the following options:
        i. **Save & Approve Study:** Button at the top of the page that adds the study to the EDI Record Review Process and updates the study’s status to *“Pending System Admin Approval”*
        ii. **Save & Add Follow-up/Dataset:** Button at the bottom of the page that saves any information entered, updates the status to *“In Progress”*, and displays the *Follow-ups and Additional Study Information* section at the bottom of the page
        iii. **Cancel:** Discards information entered and redirects you back to the *Studies* page

NOTE: New and copied versions of studies follow the same EDI Record Review Process.

Editing Released EDI Records

EDI records can be edited after release; however, the process for editing series and studies differ.

Edit Released Series

Once a series has completed the approval workflow and is released, it will be permanently displayed as read-only to Edit Users and PO Approvers. If updates are required after a series has been released, send an email with the name of the series and the requested changes along with the justification to EDI@anlar.com.

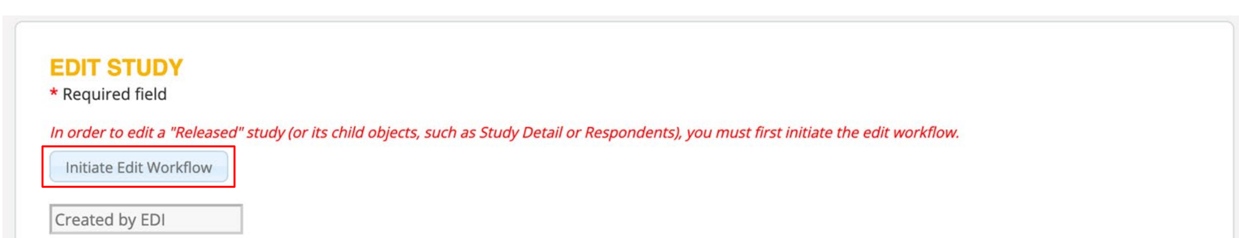
Edit Released Studies

Editing a study that has a *"Released"* status introduces a behind-the-scenes process that differs from that of adding a new study or copying a study to create a new study. When you choose to edit a released study, a duplicate version of the study is created. All edits made to the study are made to the new cloned version, with the original released study remaining unaltered in the EDI database and visible on the public EDI site (when applicable). Once the new cloned version has completed the EDI Record Review Process and is released, it will replace the original on the public EDI site. Both versions are maintained in the database, but only the newly edited version is visible in the EDI.

To edit a released study, navigate to the *Edit Study* page by either:

- Clicking on **Admin** in the Navigation Bar, selecting the **Manage Series** link on the *Site Administration* page, clicking on the **Review & Edit** button for the associated series, scrolling to the *Related Studies* section at the bottom of the page, and then clicking the **Review & Edit** button associated with the appropriate study, or
- Clicking on **Admin** in the Navigation Bar, selecting the **Manage Studies** link on the *Site Administration* page, and then clicking on the **Review & Edit** button for the appropriate study

Once you are on the *Edit Study* page, to update information contained in a released study, click the **Initiate Edit Workflow** button at the top of the page; the fields on the *Edit Study* page will become editable.



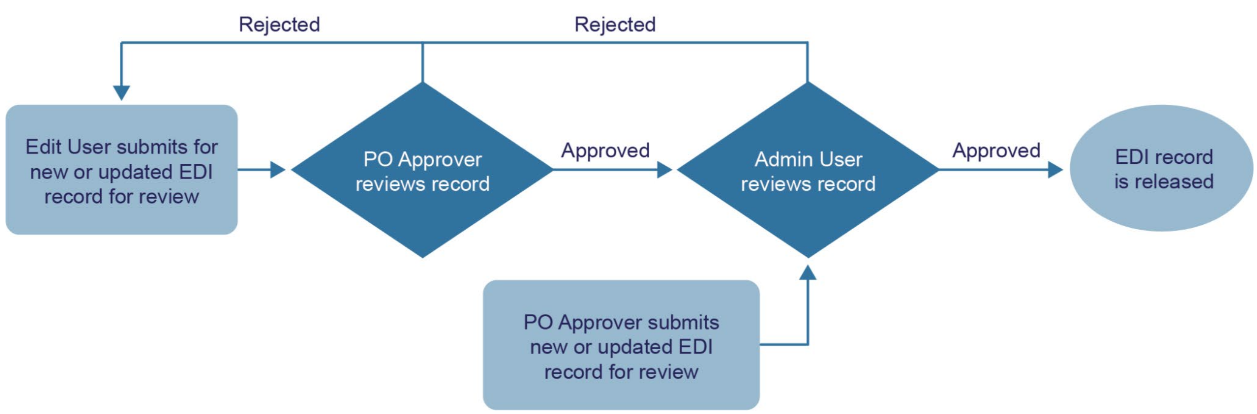
EDI Record Review Process

Each user type in the EDI has unique responsibilities and access within the role-based approval workflow. All records created within the EDI must complete the Approval Workflow. This section provides an overview of actions and responsibilities relating to the approval workflow by user type.

As a reminder, there are three distinct EDI user types:

- **Edit Users**: Possess the ability to add new series and studies. Edit Users can update released studies through the user interface and request modifications to released series by submitting requests to EDI@anlar.com. An example of an Edit User would be a contractor supporting ED staff on a specific collection.
- **PO Approvers**: Possess all Edit Users permissions with the added ability to approve/reject submissions from Edit Users within the approval process; ED staff are PO Approvers.
- **Admin Users**: Possess all PO Approver permissions with the added ability to create or manage user accounts, assign series access, update released series, approve/reject a series or study for release to the public EDI website, export the JSON of data contained in the EDI, and view the ICR Import Audit Log. The EDI COR and contractors tasked with EDI maintenance are Admin Users.

A simplified version of the approval workflow is shown below.

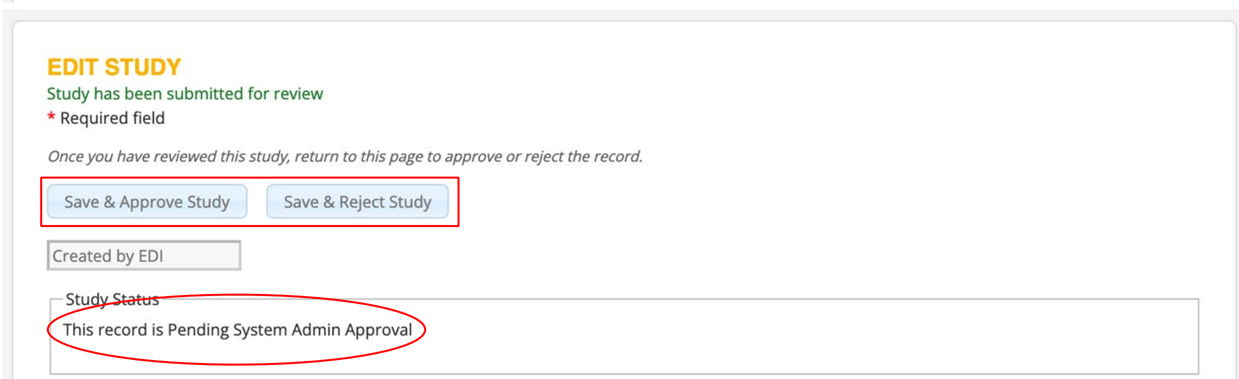


Submitting for Admin Approval

PO Approver users have the ability to create a new series or study, copy an existing study, or edit and update a released study (see EDI System Review).

Once a series or study has been saved but not yet submitted, the status of the series or study will be set to *"In Progress"*. The series or study will not yet enter the approval workflow but will now appear on the *Manage My Series/Studies* page for all users who have access.

Once all available information for the series or study has been entered, including all pages as well as the additional sections at the bottom of each page, return to the *Add/Edit Series* or *Add/Edit Study* page and click the **Save & Approve Series/Study** button at the top of the page; clicking the button officially enters the record into the approval workflow. The status of the series or study will change from *"In Progress"* to *"Pending System Admin Approval"*, and the series or study is now ready to be reviewed by the designated admin user.



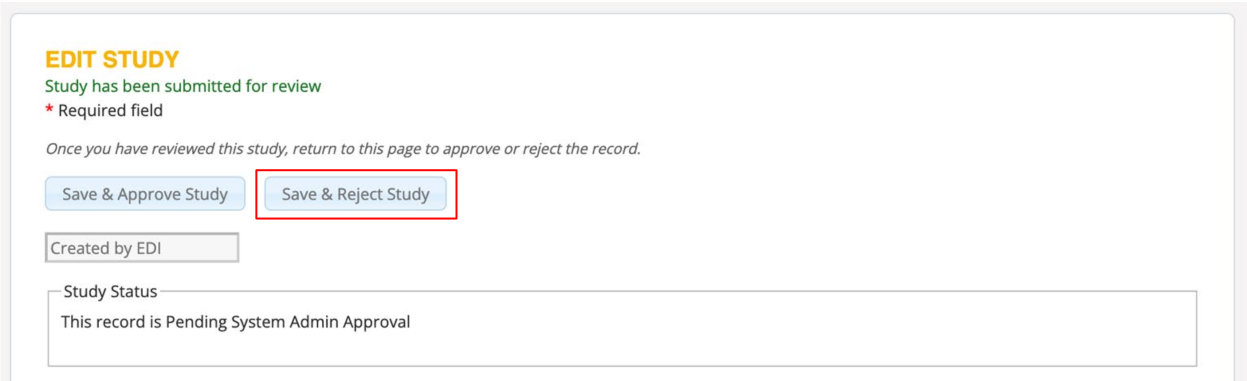
Adding Comments

Once a section of a series or study has been saved, a comments section will appear towards the bottom of the page. Comments can be added at every level of the record hierarchy and are intended to help facilitate the review process. Any user can add a comment – for example, you could alert others that a study needs to be moved to a different series. You will be notified that a comment exists on the record by icons on the *Manage My Series/Studies* page.

Once a comment is saved, it will appear to all authorized users under the *Comments* section of the page where it was created; comments will display the author as well as the date which it was created.

Rejecting Series/Studies

When a series or study has been submitted for approval, PO Approvers can reject the series or study, and send it back for edits. To reject a series, click the **Save & Reject Series** button at the top of the *Edit Series* page; click the **Save & Reject Study** button at the top of the *Studies* page to reject a study. After clicking the appropriate button, a pop-up will open requiring you to provide a comment. Once the comment explaining the rejection has been typed into the provided textbox, click the **Save** button to reject the series/study; clicking cancel will close the box and leave the status as "*Pending Approval*".



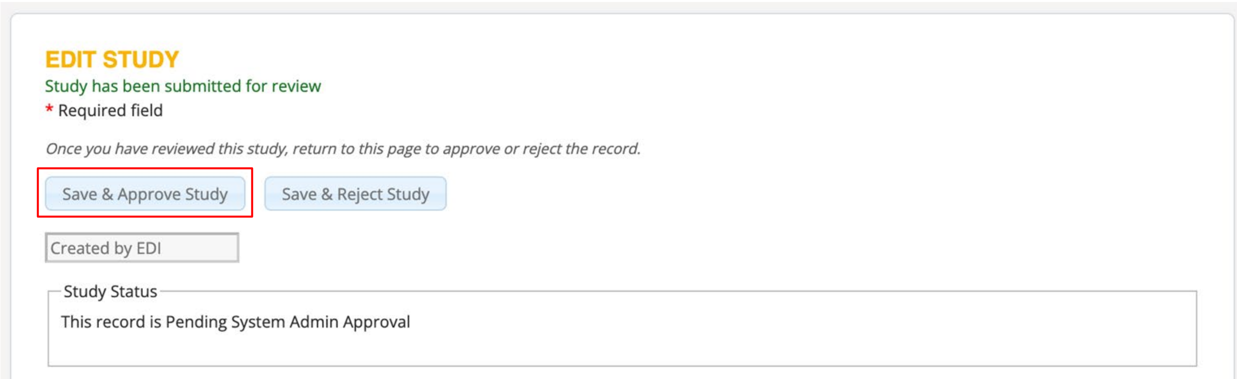
Updating Rejected Series/Studies

If a reviewer notices an issue with a record, they can either make the edits themselves or reject the study and request another user make the required updates. Rejected series or studies must be updated and resubmitted for review before being made available on the public EDI site.

When a series or study is rejected, the reviewer is required to enter a comment detailing the reason for rejection. Comments related to a rejection will appear on the *Edit Series* or *Edit Study* page.

Once necessary updates have been made to the series or study, return to the *Edit Series* or *Edit Study* page, and click the **Save & Approve** button at the top of the page.

The series or study's status will change from *"Rejected"* to *"Pending System Admin Approval"* and will reenter the workflow for review.



Archived Series and Studies

If a series or study needs to be archived, send an email with the name of the series and/or study to be archived along with the justification to EDI@anlar.com.

NOTE: Archiving a series will also archive all studies and data related to the series.

Uploading DIG Files

If the study has Data Inventory Group (DIG) files that accompany a metadata collection, these can be added at the time the study is entered. To enter a DIG file, navigate to the bottom of the *Studies* page to the *Dataset & File Metadata (Optional)* section. Click the **Add Public-use Dataset Metadata** or the **Add Restricted-use Dataset Metadata**, (depending on the file) and complete the required fields. Click the **Save & Add file** button. The system will automatically redirect you to the *Edit Public-use File Metadata* or *Edit Restricted-Use File Metadata* page.

Click **Upload Variable File** at the bottom of the screen and scroll to the **Elements** section of the page. Templates are available to download and use if the data is not in the accepted format, and they can be found on the *EDI User Resources* page in the EDI. The **Upload Variable File** and **Upload Value File** buttons allow you to batch upload; the **Add Element** button is for manual entry. It is possible that you will only see the **Upload Variable File** option. Once you upload at least one variable file, the **Upload Value File** will appear. Element files will have "var" at the beginning of the file name, while value files will have "val" at the beginning of the file name.

Once a study is released, please send DIG files to Adam Todd at (adam.todd@ed.gov). Adam will complete his review and notify the team at EDI@anlar.com. The team will initiate the workflow, upload the DIG files, and re-release the study.

Appendix A: EDI Abbreviated Data Dictionary

The abbreviated version of the EDI data dictionary is organized by table and includes the variable's name, description, data type, and permitted values (if applicable). Only variables shown on the user interface are included. For questions regarding variables or their definitions, please contact EDI@anlar.com.

Table	Variable Name	Short Variable Description	Data Type	Permitted Values
Program Office	Program Office Name	The Program Office as designated by ED.	Text	
Program Office	Program Office Old Name 1	Old previous name of the Program Office	Text	
Program Office	Program Office Old Name 2	Old previous name of the Program Office (more recent than "Program Office Old Name 1")	Text	
Program Office	Program Office Old Name 1 Duration	From when to when was the "ProgramOffice Old Name 1" used (format: MM/YYYY-MM/YYYY)	Text	
Program Office	Program Office Old Name 2 Duration	From when to when was the "Program Office Old Name 2" used (format: MM/YYYY-MM/YYYY)	Text	
Program Office	Program Office Abbreviation	Official Abbreviation of the Name of the Program Office	Text	

Program Office	Program Office Old Name 1 Abbr	Official Abbreviation of the Program Office Old Name 1	Text	
Program Office	Program Office Old Name 2 Abbr	Official Abbreviation of the Program Office Old Name 2	Text	
Unit	Unit Name	Name of Unit within the PO. If no Unit enter "none"	Text	
Unit	Unit Old Name 1	Old previous name of the unit	Text	
Unit	Unit Old Name 2	Old previous name of the unit (more recent than "Unit Old Name 1")	Text	
Unit	Unit Old Name 1 Duration	From when to when was the "Unit Old Name 1" used (format: MM/YYYY-MM/YYYY)	Text	
Unit	Unit Old Name 2 Duration	From when to when was the "Unit Old Name 2" used (format: MM/YYYY-MM/YYYY)	Text	
Unit	Unit Abbreviation	Official Abbreviation of the Name of the unit	Text	
Unit	Unit Old Name 1 Abbr	Official Abbreviation of the Unit Old Name 1	Text	
Unit	Unit Old Name 2 Abbr	Official Abbreviation of the Unit Old Name 2	Text	

Division	Division Name	Official Name of the division where applicable (e.g. AD or PACE within NCES). If no Division, enter "none"	Text	
Division	Division Old Name 1	Old previous name of the division	Text	
Division	Division Old Name 2	Old previous name of the division (more recent than "Division Old Name 1")	Text	
Division	Division Old Name 1 Duration	From when to when was the "Division Old Name 1" used (format: MM/YYYY-MM/YYYY)	Text	
Division	Division Old Name 2 Duration	From when to when was the "Division Old Name 2" used (format: MM/YYYY-MM/YYYY)	Text	
Division	Division Abbreviation	Official Abbreviation of the Name of the Division	Text	
Division	Division Old Name 1 Abbr	Official Abbreviation of the Division Old Name 1	Text	
Division	Division Old Name 2 Abbr	Official Abbreviation of the Division Old Name 2	Text	
Division	Division Description	Text from website describing the division (e.g. The PACE division is…)	Text	

Contact	Contact First Name	Contact's first name	Text	
Contact	Contact Last Name	Contact's last name	Text	
Contact	Contact Email	Contact's email address	Text	
Contact	Contact Phone	Contact's office phone number	Text	
Program	Program Name	Name of the overarching data collection program	Text	
Program	Program Old Name 1	Old previous name of the program	Text	
Program	Program Old Name 2	Old previous name of the program (more recent than "Program Old Name 1")	Text	
Program	Program Old Name 1 Duration	From when to when was the "Program Old Name 1" used (format: MM/YYYY-MM/YYYY)	Text	
Program	Program Old Name 2 Duration	From when to when was the "Program Old Name 2" used (format: MM/YYYY-MM/YYYY)	Text	
Program	Program Abbreviation	Official Abbreviation of the Name of the program	Text	

Program	Program Old Name 1 Abbr	Official Abbreviation of the Program Old Name 1	Text	
Program	Program Old Name 2 Abbr	Official Abbreviation of the Program Old Name 2	Text	
Program	Program Description	Copy and paste the verbatim text from the website which describes the program (e.g. ECLS is…)	Text	
Program	Primary Contact ID	Linking field	Number	
Program	2nd Contact ID	Linking field	Number	
Program	3rd Contact ID	Linking field	Number	
Program	Supervisor ID	Linking field	Number	
Program	Division ID	Linking field	Number	
Study	Study Name	Name of the study using naming convention	Text	
Study	Study Old Name 1	Old previous name of the study	Text	
Study	Study Old Name 1 Duration	From when to when was the "Study Old Name 1" used (format: MM/YYYY-MM/YYYY)	Text	

Study	Study Abbreviation	Official Abbreviation of the Name of the study	Text	
Study	Study Old Name 1 Abbr	Official Abbreviation of the Study Old Name 1	Text	
Study	Study Website	The study (not the program) website on an ed.gov website	Text	
Study	Study Abstract	Structured abstract of the study as a whole	Text	
Study	Frequency	Typical study frequency (annual, every 3-4 yrs., etc.) when the study continues or continued to be undertaken	Text	
Study	Most Recent Year	The year about which statistics can be generated based on the most recent available data.	Text	
Study	Program ID	Linking field	Number	
Follow-Up	Follow-Up Name	Name of the given longitudinal study base year or follow-up. If this is not a longitudinal study enter "NA"	Text	
Follow-Up	Follow-Up Abbreviation	Used abbreviation of the Follow-up Name. If this is not a longitudinal study enter "NA"	Text	

Follow-Up	Follow-Up Abstract	Structured abstract of the follow-up (beyond what's covered in the study abstract). If this is not a longitudinal study enter "NA"	Text	
Follow-Up	Longitudinal Follow-Up	Yes/No/NA indicating whether this is a longitudinal follow-up of a previous data collection. If it's a longitudinal study base year enter "No" if it's not a longitudinal study enter "NA"	Number	1: "Yes" 0: "No" 9: "NA"
Follow-Up	Preceding Follow-Up ID	Linking ID of the Study to which this study is a follow-up.	Number	
Detail	Releasable	Is the Detail's parent Study/Follow-Up ready for public viewing via the DIG web application?	Number	0: No 1: Yes
Detail	Keywords	Keywords for the longitudinal follow-up, if applicable, otherwise keywords for the study	Text	
Detail	Steward	Which office is the owner of this data	Text	

Detail	Full-Scale Years	For the given follow-up (if longitudinal) or study (if not longitudinal) - indicate the year in which the full-scale data collection will or did take place	Text	
Detail	Experiment Flag	Yes/no indicating whether experiments are present as part of any collection that is part of this follow-up (if longitudinal) or study (if not longitudinal)	Number	0: No 1: Yes
Detail	Universe Survey	Yes/no. Is this a collection of data on the Universe of subjects (e.g. all schools, all migrant students, etc.). All possible respondents in a defined category are included in the study.	Number	0: No 1: Yes
Detail	Sample Survey	Yes/no. Is this a collection based on a sample of subject from the universe (sample of the possible respondents in a defined category)	Number	0: No 1: Yes
Detail	Cross-Sectional	Yes/no. Cross-sectional is when given respondents are sampled at one point in time (not followed over time as in a longitudinal study)	Number	0: No 1: Yes

Detail	Longitudinal	Yes/no. Longitudinal is when respondents are surveyed or followed over time with data collected on the same individuals or entities at different points in time and then are linked over time	Number	0: No 1: Yes
Detail	Voluntary	Yes/no. Indicates whether any aspects of participating and responding to the given data collection are fully voluntary on the part of all respondents.	Number	0: No 1: Yes
Detail	Mandatory	Yes/no. Indicates whether any aspect of the collection is part of Mandatory Reporting, i.e. by law, the respondent must respond.	Number	0: No 1: Yes
Detail	Required For Benefits	Yes/no. Indicates whether any aspect of the collection is Required for Benefits	Number	0: No 1: Yes
Detail	Program Monitoring	Yes/no. Is the collection of data submitted to ED as part of program monitoring compliance	Number	0: No 1: Yes
Detail	Grantee Reports	Yes/no. Is the collection of data submitted to ED by grantees as part of grant monitoring compliance	Number	0: No 1: Yes

Detail	Requirement Detail	Which aspects/portions of this data collection are required, mandated, or voluntary, from which respondents & what are the consequences for not providing the required or mandated information	Memo	
Detail	Requirement Reason	Why is the collection required or mandatory	Memo	
Detail	Authorizing Law	Which law authorizes this collection of information?	Text	
Detail	Bureau Code	MAX system bureau code assigned by OMB to the office originally responsible for the collection of information of this Detail's parent Study.	Text	
Detail	Program Code	MAX system program code assigned by OMB for the activities organized under this Detail's parent Study.	Text	"018:000"
Detail	SORN	6-digit System of Records Number. Should correspond to "yes" under PII.	Text	

Detail	SORN URL	URL of the System of Records notice, published in the Federal Register, issuing the System of Records Number (SORN).	Text	
Detail	Could Be Public	Yes/no. Could the data from this collection EVER be released as public-use?	Number	0: No 1: Yes
Detail	Public Access Level	Indicator of the current public access status of the published dataset(s) containing data collected by this Detail's parent Study.	Text	"Public" "Public Restricted" "Non-Public"
Detail	Confidentiality Restrictions	Are there Confidentiality Restrictions (regarding the data) that preclude public release (i.e., can only be available as restricted access or internal use) and, if so, describe what they are and why they apply to this study; also, cite any legal restrictions where applicable	Memo	
Detail	Publication Date (Stats)	Date when FIRST statistics became/will be published (e.g. first look report, data tables, etc…)	Date/Time	

Detail	Publication Type (Stats)	Indicate the type of report in which first statistics became/will be published (i.e. first look report, data tables, etc…)	Text	
Detail	Publication URL (Stats)	The main Web address on ed.gov for the FIRST published statistics	Text	
Detail	Planned Pub (Stats)	Is v90 an estimated date? Yes/no. "No" if the Publication Date (Stats) entry is based on already published statistics (representing the actual). "Yes" if it's based on a planned date.	Number	0: No 1: Yes
Detail	Publication Date (Data)	Date when manipulable data FIRST became/will be published and in what tool (i.e. power stats, DAS)	Date/Time	
Detail	Publication URL (Data)	The main Web address on ed.gov for the FIRST published manipulable data	Text	
Detail	Planned Pub (Data)	Is v94 an estimated date? Yes/no. "No" if the Publication Date (Data) entry is based on already published data (representing the actual). "Yes" if it's based on a planned date.	Number	0: No 1: Yes

Detail	Restricted-Use Date	Date when Restricted Data is/will be available	Date/Time	
Detail	Planned Restricted Data	Is v97 an estimated date? Yes/no. "No" if the Restricted-use Date entry is based on already published data (representing the actual). "Yes" if it's based on a planned date.	Number	0: No 1: Yes
Detail	Students	Primary/non-primary/no. Is the study ABOUT students and/or their parents (including adult education or skills of the general adult population)?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Staff	Primary/non-primary/no. Is the study ABOUT staff of education institutions or entities (including teachers, administrators, and other staff)?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Institutions	Primary/non-primary/no. Is the study ABOUT institutions or other education/care providers, including child care centers, schools, LEAs, SEAs, postsecondary institutions, etc.?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"

Detail	Programs	Primary/non-primary/no. Is this study ABOUT education or care related programs provided to people?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Other Subject	If the study is NOT ABOUT people, institutions, or programs, please specify what units the study is about.	Text	
Detail	Age 0-2	Primary/non-primary/no. Is the study ABOUT people aged 0-2 years old?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Age 3-5	Primary/non-primary/no. Is the study ABOUT people aged 3-5 years old?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Age 6-21	Primary/non-primary/no. Is the study ABOUT people aged 6-21 years old?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Age Older Than 21	Primary/non-primary/no. Is the study ABOUT people older than 21 years of age?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"

Detail	Age NA	Primary/non-primary/no. Is the study NOT ABOUT people of a certain age (such as teachers or institutions) and therefore the age of the study subject doesn't matter?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Pre-K	Primary/non-primary/no. Is the study ABOUT pre-K education (e.g. students, institutions, or programs)? (This category does NOT include kindergarteners)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Elementary	Primary/non-primary/no. Is the study ABOUT Elementary School (K- 5) education (e.g. students, institutions, or programs)?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Middle	Primary/non-primary/no. Is the study ABOUT Middle School (6-8) education (e.g. students, institutions, or programs)?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	High School	Primary/non-primary/no. Is the study ABOUT High School (9-12) education (e.g. students, institutions, or programs)?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"

Detail	Postsecondary	Primary/non-primary/no. Is the study ABOUT Postsecondary education (e.g. students, institutions, or programs)?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Graduate	Primary/non-primary/no. Is the study ABOUT Graduate (post-baccalaureate) education (e.g. students, institutions, or programs)?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Continued Technical Ed	Primary/non-primary/no. Is the study ABOUT Continued Technical education (e.g. students, institutions, or programs) such as adults obtaining industry specific Certificates/Certifications?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Adult Education	Primary/non-primary/no. Is the study ABOUT Adult education (e.g. students, institutions, or programs)?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	General Adult	Primary/non-primary/no. Is the study ABOUT General Adults or general adult programs regardless of whether the adults are students or not?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"

Detail	Education Level NA	specified education level categories and therefore the education level of the study subject doesn't matter?	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Detail	Other Population	If other than the above age and/or education level categories, then specify who or what the study is ABOUT (e.g. specific sector of labor force; teachers; post-graduates; parents, etc.)	Text	
Detail	Individual Data	Yes/no. Is data collected at an individual level so that the data can be analyzed at an individual level and are representative of individuals from a certain population?	Number	0: No 1: Yes
Detail	Classroom Data	Yes/no. Can data be analyzed at a Classroom level and are representative of Classrooms?	Number	0: No 1: Yes
Detail	Grade Level Data	Yes/no. Can data be analyzed at a Grade level and are representative of Grade Levels?	Number	0: No 1: Yes

Detail	School/Institution Data	Yes/no. Can data be analyzed at a School/Institution level and are representative of Schools/Institutions?	Number	0: No 1: Yes
Detail	LEA Data	Yes/no. Can data be analyzed at a LEA level and are representative of LEAs?	Number	0: No 1: Yes
Detail	State Data	Yes/no. Can data be analyzed at a State level and are representative of States?	Number	0: No 1: Yes
Detail	Region Data	Yes/no. Can data be analyzed at a Region level and are representative of Regions?	Number	0: No 1: Yes
Detail	National Data	Yes/no. Can data be analyzed at a National level and are representative of the U.S?	Number	0: No 1: Yes
Detail	Other Data Level	If data are collected at a level other than those specified, so that the data can be analyzed and are representative at that level, specify the level.	Text	
Detail	Data Level Detail	Short description of the levels at which data can be analyzed and are representative of in this study	Memo	

Collection	Collection Name	Collection Name - indicates whether the data collection is a cog lab, focus group, pilot, field test, full scale, etc. (e.g. ECLS-K First Follow- up Field Test or ECLS-K First Follow-up Full Scale Collection). Naming convention: <Follow-up Name> <type of collection> <any additional descriptor (if applicable)> [<year of actual data collection (yyyy or yyyy-yy)>]; if "Follow-up Name" is "NA" then <Study Name> <type of collection> <any additional descriptor (if applicable)> [<year of actual data collection (yyyy or yyyy-yy)>].	Text	
Collection	Collection Type	Select from a dropdown list: Customer Survey/Feasibility Calls/Pretest/Cog Lab/Focus Group/Pilot Test/Field Test/Full Scale/Address update/List Collection	Text	"Customer Survey" "Pretest" "Cog Lab" "Focus Group" "Pilot Test" "Field Test" "Full-Scale" "Address Update" "List Collection" "NA"

Collection	Collection Start Date (Planned)	Planned Starting Date of this Data Collection	Date/Time	
Collection	Collection Start Date (Actual)	Actual Starting Date of this Data Collection	Date/Time	
Collection	Collection End Date (Planned)	Planned Ending Date of this Data Collection	Date/Time	
Collection	Collection End Date (Actual)	Actual Ending Date of this Data Collection	Date/Time	
Respondents	Respondent Type	Choose ONE from the list of "Respondent Categories."	Text	"State" "State (Expanded Sample)" "LEA/Superintendent" "Teacher" "Principal" "School" "Paraprofessional" "Curriculum Specialist" "Guidance Counselor" "Librarian" "Nurse" "Student" "Parent" "Postsecondary Institution" "Postsecondary Faculty" "Other (Specify)"

Respondents	Respondent Type Detail	Respondent Type Detail (e.g. age, grades, other descriptors)	Text	
Respondents	Topics	A description of the topics for which information is collected from the respondent	Memo	
Respondents	Expected Sample Size	Expected # in Sample of the given respondent type	Number	
Respondents	Actual Sample Size	Actual # in Sample of the given respondent type	Number	
Respondents	Response Rate Estimated	Estimated Response Rate for this respondent type	Number	
Respondents	Response Rate Actual	Actual Response Rate for this respondent type	Number	
Respondents	Final Data Format	In what format is the Final Data? (e.g., asci, xml, DFT, etc.)	Text	
Respondents	Required Response Detail	Which aspects/portions of this data collection are required, mandated, or voluntary, from these respondents & what are the consequences for not providing the required or mandated information	Memo	

Respondents	Response Requirement Reason	Why is the collection required or mandatory from these respondents	Memo	
Respondents	Explicit Consent	Yes/no indicating whether Explicit Consent is obtained to collect data from these respondents (requiring opt-in signature)	Number	0: No 1: Yes
Respondents	Implicit Consent	Yes/no indicating whether Implicit Consent is provided to collect data from these respondents (for opt-out signature)	Number	0: No 1: Yes
Respondents	Consent Not Applicable	Yes/no indicating whether participation of these respondents does not require consent for their participation (regardless of whether explicit, implicit, or formless)	Number	0: No 1: Yes
Respondents	VC Language IC	Voluntary and Confidentiality Language in the Data Collection Instruments (IC) for these respondents, i.e. survey instruments, including screeners, etc.	Memo	
Respondents	Respondent Age 0-2	Yes/no indicating whether any of these respondents are Age 0-2	Number	0: No 1: Yes

Respondents	Respondent Age 3-5	Yes/no indicating whether any of these respondents are Age 3-5	Number	0: No 1: Yes
Respondents	Respondent Age 6-21	Yes/no indicating whether any of these respondents are Age 6-21	Number	0: No 1: Yes
Respondents	Respondent Age Older Than 21	Yes/no indicating whether any of these respondents are older than age 21	Number	0: No 1: Yes
Respondents	Respondent Age NA	Yes/no indicating whether the age of these respondents is irrelevant	Number	0: No 1: Yes
Respondents	Respondent Pre-K	Yes/no indicating whether any of these respondents are students or workers in Pre-K	Number	0: No 1: Yes
Respondents	Respondent Elementary	Yes/no indicating whether any of these respondents are students or workers in Elementary School (K-5)	Number	0: No 1: Yes
Respondents	Respondent Middle	Yes/no indicating whether any of these respondents are students or workers in Middle School (6-8)	Number	0: No 1: Yes
Respondents	Respondent High School	Yes/no indicating whether any of these respondents are students or workers in High School (9-12)	Number	0: No 1: Yes

Respondents	Respondent Postsecondary	Yes/no indicating whether any of these respondents are students or workers in Postsecondary schools (up to Bachelor degree)	Number	0: No 1: Yes
Respondents	Respondent Graduate	Yes/no indicating whether any of these respondents are students or workers in Post-baccalaureate education	Number	0: No 1: Yes
Respondents	Respondent Continued Technical Ed	Yes/no indicating whether any of these respondents are providers of or students obtaining Certificates/Certifications	Number	0: No 1: Yes
Respondents	Respondent Adult Education	Yes/no indicating whether any of these respondents are providers of or students participating in Adult Education	Number	0: No 1: Yes
Respondents	Respondent Education Level NA	Yes/no indicating whether involvement in a specific education level of these respondents is not a key sample selection criteria	Number	0: No 1: Yes
Respondents	Respondent Other Population	Are any of these respondents serving or part of an age and/or education level population Other than those provided - Specify	Text	

Respondents	Respondent Population Detail	Short description of who these respondents are	Memo	
Respondents	Administrative Records	Yes/no indicating whether these respondents are providing information based on/from administrative records	Number	0: No 1: Yes
Respondents	Address Update	Yes/no indicating whether these respondents are providing Address Update information	Number	0: No 1: Yes
Respondents	List Data	Yes/no indicating whether these respondents are providing lists of potential respondents	Number	0: No 1: Yes
Respondents	Recruitment	Yes/no indicating whether these respondents are incurring burden due to recruitment	Number	0: No 1: Yes
Respondents	Coordination Help	Yes/no indicating whether these respondents are incurring burden because they are helping to coordinate anything pertaining to the data collection	Number	0: No 1: Yes
Respondents	Screener	Yes/no indicating whether these respondents are providing information through a screener	Number	0: No 1: Yes

Respondents	Assessment	Yes/no indicating whether these respondents are being given an Assessment (a test of any kind)	Number	0: No 1: Yes
Respondents	Survey	Yes/no indicating whether these respondents are being given a Survey (a questionnaire of any type) that is not solely seeking information from administrative records	Number	0: No 1: Yes
Respondents	Abbreviated Survey	Yes/no indicating whether these respondents (or apparent non-respondents) are being given an Abbreviated version of the main survey (a subset of survey questions)	Number	0: No 1: Yes
Respondents	Program Reporting	Yes/no indicating whether these respondents are providing information as part of Program Reporting	Number	0: No 1: Yes
Respondents	EDFacts	Yes/no indicating whether these respondents are providing information for EDFacts data collection (previously called EDEN)	Number	0: No 1: Yes

Respondents	CPS	Yes/no indicating whether these respondents are providing information as part of the Central Processing System (CPS) for post-secondary education	Number	0: No 1: Yes
Respondents	NSLDS	Yes/no indicating whether these respondents are providing information as part of the National Student Loan Data System (NSLDS)	Number	0: No 1: Yes
Respondents	Other Response Type	If these respondents are providing a type of response Other than those provided - Specify	Text	
Respondents	Response Type Detail	Short description of the response types provided by these respondents	Memo	
Respondents	Paper	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using a paper (printed) survey (often referred to as paper-and-pencil)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"

Respondents	Phone (Not CATI)	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using Interview over the Phone (paper-and-pencil over the phone - not computer assisted)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Respondents	CATI	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using Computer Assisted Phone Interview (CATI)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Respondents	Web	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using Web (over the Internet)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Respondents	Email	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using e-mail (responses or data submitted by the respondent over the email)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"

Respondents	F2F (Not CAPI)	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using a Face to Face interview (e.g. many cog labs and focus groups are F2F) (paper-and-pencil or on tape in person - not computer assisted)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Respondents	CAPI	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using Computer Assisted Personal Interview (CAPI)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Respondents	Spreadsheet	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using a Spreadsheet (responses or data submitted by the respondent in a Spreadsheet)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"
Respondents	PRS	Primary/non-primary/no/NA indicating whether the information is collected from these respondents using a web-based Performance Reporting System (typically for program data submissions)	Number	2: "Primary" 1: "Non-Primary" 0: "No" 9: "NA"

Respondents	Other Collection Mode	If the information is collected from these respondents using a mode (method) Other than those listed above - Specify	Text	
Respondents	Collection Mode Detail	Short description of the Collection Modes used with these respondents	Memo	
Respondents	Other Languages	In what languages other than English are instruments for this respondent offered?	Text	
Respondents	Interpreters	What languages are interpreters available for?	Text	
Respondents	Feasibility Calls	Yes/no indicating whether any parts of the data collections instruments used in this data collection were tested in advance with this respondent type using Feasibility Calls	Number	0: No 1: Yes
Respondents	Pretest	Yes/no indicating whether any parts of the data collections instruments used in this data collection were tested in advance with this respondent type using a Pretest	Number	0: No 1: Yes

Respondents	Cog Labs	Yes/no indicating whether any parts of the data collections instruments used in this data collection were tested in advance with this respondent type using Cognitive Labs/interviews	Number	0: No 1: Yes
Respondents	Focus Groups	Yes/no indicating whether any parts of the data collections instruments used in this data collection were tested in advance with this respondent type using Focus Groups	Number	0: No 1: Yes
Respondents	Pilot Test	Yes/no indicating whether any parts of the data collections instruments used in this data collection were tested in advance with this respondent type using a Pilot Test	Number	0: No 1: Yes
Respondents	Field Test	Yes/no indicating whether any parts of the data collections instruments used in this data collection were tested in advance with this respondent type using a Field Test	Number	0: No 1: Yes
Dataset	Dataset Title	The title of a Dataset, as assigned by ED.	Text	

File	Study ID	Automatically generated ID of each Study	Number	
File	File Name	The name of the file containing a Dataset, as assigned by ED.	Text	
File	FileRestriction	An indicator of the rights level necessary for viewing a File and Elements associated with it (ie, public, restricted, or internal-use only).	Number	0: Public Use 1: Restricted Use 2: ED Internal Use
File	File Location 1	The URL where a File can be located or access can be requested.	Text	
File	Location 1 Type	File location URL type.	Number	0: Direct Download URL 1: Web Page URL
File	File Format	For direct download URLs, the specific format type in which the file is available for download or online use. For web page URLs, a list of the format type(s) in which the file is available.	Text	
File	Location 1 Detail	Further details of a file's location (eg. "2002 Academic Libraries Study data as a SPSS txt file").	Text	

File	Media Type 1	The machine-readable file format of the URL.	Number	0: application/xml 1: application/zip 2: application/pdf 3: application/msword 4: application/vnd.ms-excel 5: text/css 6: text/csv 7: text/html 8: text/plain 9: application/json 10: application/vnd.geo+json 11: application/vnd.google-earth.kml+xml
File	File Location 2	The URL where a File can be located or access can be requested.	Text	
File	Location 2 Type	File location URL type.	Text	0: Direct Download URL 1: Web Page URL

File	Location 2 Format	For direct download URLs, the specific format type in which the file is available for download or online use. For web page URLs, a list of the format type(s) in which the file is available.	Text	
File	Location 2 Detail	Further details of a file's location (eg. "2002 Academic Libraries Study data as a SPSS txt file").	Text	
File	Media Type 2	The machine-readable file format of the URL.	Number	0: application/xml 1: application/zip 2: application/pdf 3: application/msword 4: application/vnd.ms-excel 5: text/css 6: text/csv 7: text/html 8: text/plain 9: application/json 10: application/vnd.geo+json 11: application/vnd.google-earth.kml+xml

File	File Location 3	The URL where a File can be located or access can be requested.	Text	
File	Location 3 Type	File location URL type.	Text	0: Direct Download URL 1: Web Page URL
File	Location 3 Format	For direct download URLs, the specific format type in which the file is available for download or online use. For web page URLs, a list of the format type(s) in which the file is available.	Text	
File	Location 3 Detail	Further details of a file's location (eg. "2002 Academic Libraries Study data as a SPSS txt file").	Text	

File	Media Type 3	The machine-readable file format of the URL.	Number	0: application/xml 1: application/zip 2: application/pdf 3: application/msword 4: application/vnd.ms-excel 5: text/css 6: text/csv 7: text/html 8: text/plain 9: application/json 10: application/vnd.geo+json 11: application/vnd.google-earth.kml+xml
File	File Location 4	The URL where a File can be located or access can be requested.	Text	
File	Location 4 Type	File location URL type.	Text	0: Direct Download URL 1: Web Page URL

File	Location 4 Format	For direct download URLs, the specific format type in which the file is available for download or online use. For web page URLs, a list of the format type(s) in which the file is available.	Text	
File	Location 4 Detail	Further details of a file's location (eg. "2002 Academic Libraries Study data as a SPSS txt file").	Text	
File	Media Type 4	The machine-readable file format of the URL.	Number	0: application/xml 1: application/zip 2: application/pdf 3: application/msword 4: application/vnd.ms-excel 5: text/css 6: text/csv 7: text/html 8: text/plain 9: application/json 10: application/vnd.geo+json 11: application/vnd.google-earth.kml+xml

Element	Element Name	The name of an Element, as assigned by ED.	Text	
Element	Element Label	A short description of the contents of an Element, given by ED.	Memo	
Element	Element Extended Definition	An extended description of the contents of an Element, given by ED.	Memo	
Element	Element Question	The text of the questionnaire item that generated the data underlying an element, given by ED.	Memo	
Element	Element Type	An indicator of the type of data contained within an Element (ie, numeric or alphanumeric data).	Text	"Numeric" "Alphanumeric"
Element	Vector	A flag indicating whether an Element is described using vector-type metadata.	Number	0: No 1: Yes
Element	EDFacts	A flag indicating whether an Element is further described by the EDFacts extension table.	Number	0: No 1: Yes
Element	IDEA	A flag indicating whether an Element is further described by the IDEA extension table.	Number	0: No 1: Yes

Value	Value Label	The short description associated with and mapped to a Value's value option, given by ED.	Memo	
Value	Value Option	The alphanumeric value taken on by a particular Value, given by ED.	Text	
Value	Searchable Data	Searchable Data	Text	

Appendix B: Element Fire Definitions

Variable file example:

Template	Variable Name	Short Variable Description	Example
Variable	Element Name	Variable name	B_Q27BUSX
Variable	Element Label	Variable label	Activities – Class – Class/tutor GED
Variable	Element Type	Numeric vs. Alphanumeric	Numeric
Variable	Format	This field provides linkage between variable and value options	B_Q27BUSX
Variable	Study ID	Assigned by EDI, shown as a read-only field at the top of the *Add/Edit File* page.	15000
Variable	Study Name	Name of study using naming convention	U.S. Program for the International Assessment of Adult Competencies (PIAAC)
Variable	File Name	The name of the data file from which the elements are extracted	prgusap1_puf
Variable	Element Question	Questionnaire wording associated with the variable. If the variable does not have an associated questionnaire wording, leave it blank.	
Value	Format	This field provides linkage between variable and value options	B_Q27BUSX
Value	Value Option	The alphanumeric value taken on by a particular value	4

Value	Value Label	The short description associated with a value's option	More than 60% to 80%
Value	Study ID	Assigned by EDI, shown as a read-only field at the top of the *Add/Edit File* page.	15000
Value	Study Name	Name of study using naming convention	U.S. Program for the International Assessment of Adult Competencies (PIAAC)
Value	File Name	The name of the data file from which the elements are extracted	prgusap1_puf