

Creating EDI Records | Edit User Guide

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

Email:@ed.gov
Password: P@ssw0rd

CREATING A NEW SERIES

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

***TIP:** The Principal Office drop down is populated by records created on the **Manage Principal Office** page. The Contact Information drop downs are populated by records created on the **Manage Contact** page. The Preferred Approver drop down is populated with the list of users with PO Approver status, determined by system administrators. If your preferred approver is not listed, please email EDI@anlar.com to request that they be added.*

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

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

CREATING A NEW STUDY

Click **ADMIN** in the Navigation Bar.

Via the respective **Edit Series** page

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

Via the **Manage Study** Page

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

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

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

Follow-Ups and Additional Study Information*

Scroll to the bottom of the **Edit Study** page. In the *Follow-Ups and Additional Study Information* section, click **Add Follow-Up**. Complete the form with information available.

Tip: *If the study does not have a follow-up, select “NA” for Longitudinal Follow-Up. The fields will auto-populate with “NA” and you can proceed to add Study Details and following sections.*

Click **Save & Add Study Details**.

Study Details*

In the *Study Details* section, click **Add Study Details**.

Complete the form with information available.

Tip: *If you wish to have the study appear on the EDI public site, check **Releasable** in the first section.*

Click **Save & Add Collection**. Tables beyond this point are strongly encouraged, but not required.

EDI Record Hierarchy

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

*Required sections

Collection

In the *Related Collections* section, click **Add Collection**. Complete the form with information available.

Click **Save & Add Respondent**.

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

Respondent

In the *Respondents* section, click **Add Respondent**. Complete the form with information available.

Click **Save & Return to Collection**.

Tip: *A Collection can have multiple associated Respondent records. After completing the first Respondent form, add additional Respondent records by clicking **Add Respondent** in the Respondents section at the bottom of the **Edit Collection** page.*

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

ADDING A DATASET/FILE (OPTIONAL)

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

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

In the *File* section, click **Add File**. Complete the form with available information. You can enter up to four locations/formats for the file, however only one is required.

Click **Save & Add Element**.

Users have two options for populating forms for elements and their associated values.

- 1. Auto-Populate Tables via File Upload (recommended):** Use the downloadable templates to populate files with the file's variables and values. Upload files to the EDI by clicking **Upload Variable File** and **Upload Value File**, respectively.

Tip: Make sure files are formatted correctly according to the template; the system cannot auto-populate element and value tables if they are not. Upload the Variable file first, then the Value file (if applicable).

The table will populate with the File Name, Date of Upload, and the Status. Once complete, click **Save & Return to Study**.

ELEMENTS

Upload variable and value files to automatically populate element and label tables. Files MUST be formatted correctly for the upload to be successful. Ensure your files exactly match the templates below before uploading. The status of your upload can be found below.

If you receive an error message, please contact edi@anlar.com.

<input type="button" value="Upload Variable File"/>	EDIVariableTypeTemplate.xlsx	File Name:	Date of upload:	Status: N/A
<input type="button" value="Upload Value File"/>	EDIValueFileTemplate.xlsx	File Name:	Date of upload:	Status: N/A

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

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

Once all sections have been populated with available information, click **Save & Submit Study for Approval** at the top of the *Edit Study* page. Your study has now entered the approval workflow. Check the top of the page to ensure the study's status is now *Pending Approval*.

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

RESOURCES & ASSISTANCE

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