ED DATA INVENTORY BETA

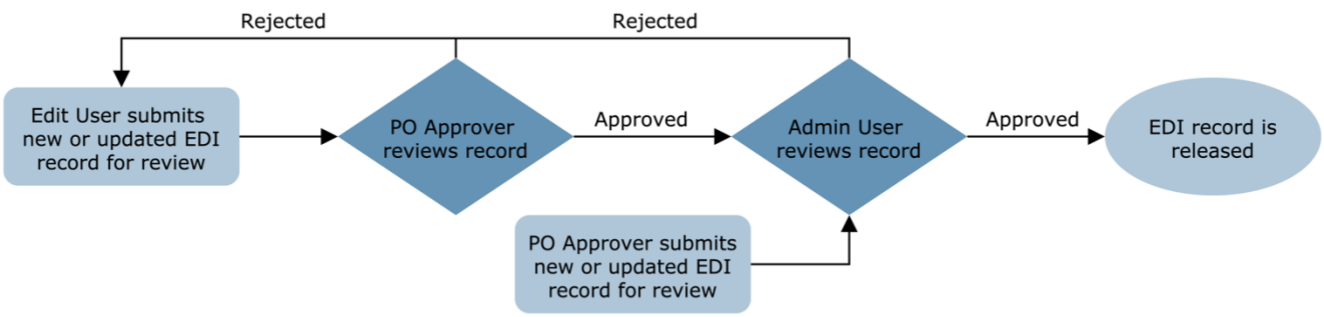
Reviewing EDI Records | PO Approver Guide

Go to https://datainventory.ed.gov/.
Click **LOG IN** on the menu bar.
Enter login credentials (see right).

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

APPROVAL WORKFLOW

Before a record is officially included in the EDI database, it must complete the role-based approval workflow. In this process, records are created, edited, and reviewed, with each user type playing a unique role in the workflow.



REVIEWING SERIES RECORDS

Click **ADMIN** in the Navigation Bar.
Click **Manage My Series/Studies**. A list of records that are currently in the approval work flow will appear.
Tip: *Series Status indicates the status of the Series listed. Series and studies navigate the workflow independent of each other.*
Click on a Series title (ie. the highest in the record tree).

On the ***Edit Series*** page, check the "Series Status" at the top of the page.

If the Series is *Pending System Admin Approval or Released*
No action is required. Continue to the Reviewing Study Records section below.

If the study is *Pending Approval*
The record has been created or updated by an Edit User and submitted. The record requires your review and approval in order to continue through the approval work flow. Follow the steps below.

If the study is *In Progress, Unreleased* or *Rejected*
The record may be incomplete and requires attention from either you or an Edit User. Please refer to the Updating EDI Records User Guide for more information.

Review the information on the ***Edit Series*** page for accuracy and completeness. If edits are required, you have two options:

Update the Record	Request Edits via Comments
If the information needed to update the record is available to you, make the necessary edits and click **Save** at the bottom of the page.	If the information needed to update the record is not available to you, you can request the necessary edits be made by an Edit User using the comments feature found at the bottom of the page.

If the information on the Edit Series page is accurate and complete, click **Save & Approve** at the top of the page. Check to ensure the series' status is now *Pending System Admin Approval*. If you have requested additional edits via comments, click **Save & Reject** at the top of the page. Check to ensure the series' status is now *Rejected.*

REVIEWING STUDY RECORDS

Scroll to the *Related Studies* section at the bottom of the ***Edit Series*** page. The column "Released" indicates whether or not a study has the status of *Released*. For each study that is not released, complete the following steps.

Click **Review & Edit** across from the study of interest.

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

If the Study is ***Pending System Admin Approval***	If the study is ***Pending Approval***	If the study is ***In Progress, Unreleased*** **or** ***Rejected***
The record has already been reviewed by a PO Approver and is awaiting Admin User review and release. No further action is required. Return to ***Edit Series*** page by clicking **Back to Series** at the top of the page to continue your review of other studies.	The record has been created or updated by an Edit User and submitted. The record requires your review and approval in order to continue through the approval work flow. Follow the steps below.	The record may be incomplete and requires attention from either you or an Edit User. Please refer to the Updating EDI Records User Guide for more information.

Studies have multiple sections, each requiring your review for accuracy and completeness. If edits are required, you have two options:

Update the Record
If the information needed to update the record is available to you, make the necessary edits and click **Save** at the bottom of the page.

Request Edits via Comments
If the information needed to update the record is not available to you, you can request the necessary edits be made by an Edit User using the comments feature found at the bottom of the page.

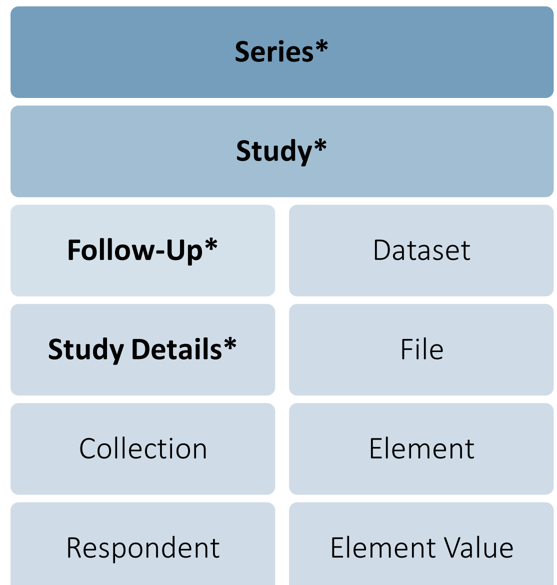
Start by reviewing the information included on the ***Edit Study*** page. If edits are required, either update the record or make a comment detailing the request.

Click **Save** at the bottom of the page.

Scroll to the *Follow-Ups and Additional Study Information* section at the bottom of the page. If a Follow-Up record is listed, click **Review & Edit** across from the first listed. Review the information included on the ***Edit Follow-Up*** page. If edits are required, either update the record or make a comment detailing the request.

Click **Save**.

Scroll to the *Study Details* section at the bottom of the page. If a Study Details record is listed, click **Review & Edit**. Review the information included on the ***Edit Study Details*** page. If edits are required, either update the record or make a comment detailing the request.
Tip: *If you wish to have the study appear on the EDI public site,* ***Releasable*** *(found in the first section) must be checked.*



*Required sections

Click **Save**.

Scroll to the *Collections* section at the bottom of the page. If a *Collections* record is listed, click **Review & Edit**. Review the information included on the ***Edit Collections*** page. If edits are required, either update the record or make a comment detailing the request.

Click **Save**.

Tip: *After saving, you can review additional collections (if applicable) by clicking* ***Back to Study Detail*** *at the top of the* **Edit Collection** *page. Once on the* **Edit Study Detail** *page, click on the next* Collection *listed.*

Scroll to the *Respondents* section at the bottom of the page.

If a *Respondent* record is listed, click **Review & Edit**. Review the information included on the ***Edit Collections*** page. If edits are required, either update the record or make a comment detailing the request.

Click **Save & Return to Collection**.

***Tip:** You will return to the* **Edit Collection** *page. You can review additional respondents by scrolling to the* Respondents *section and clicking on the next listed.*

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

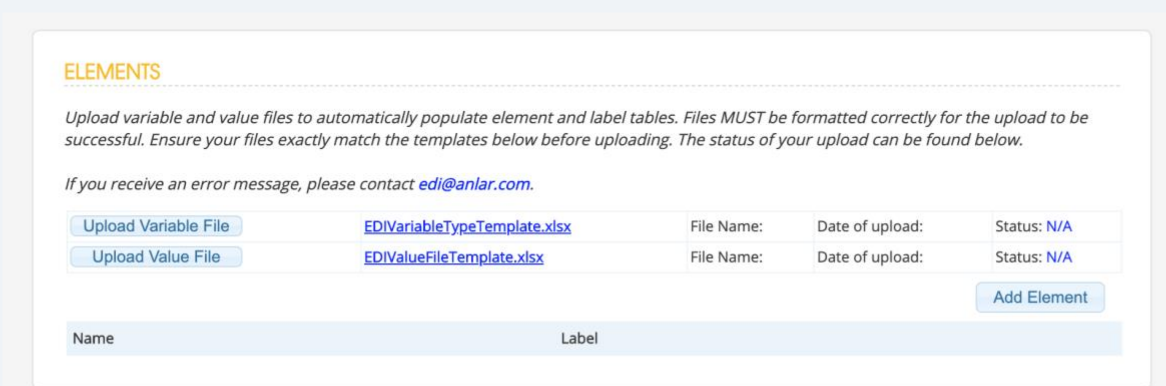
REVIEWING DATASETS & FILES

At the bottom of the ***Edit Study*** page, scroll to the *Dataset/File* section at the bottom of the page. If a Dataset record is listed, click **Review & Edit**. Review the information included on the ***Edit Dataset*** page. If edits are required, either update the record or make a comment detailing the request. If not, continue to the next section.
Click **Save.**

Scroll to the *File* section at the bottom of the page. If a File record is listed, click **Review & Edit** across from the first listed. Review the information included on the ***Edit File*** page. If edits are required, either update the record or make a comment detailing the request.
Click **Save**.

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

1. **Auto-populate Tables via File Upload (recommended)**: Users are encouraged to complete the review of element files prior to uploading them to the EDI. Please refer to the [Adding Element File] guide and [Element File Data Quality Checklist] for more information.



2. **Manual Input**: Users can review each individual Element and their associated Values through the user interface by clicking **Review & Edit** across from each listed.

Once complete, click **Save & Return to Study.**

If all of the information included in the Study record is accurate and complete, click **Save & Approve** at the top of the page. Check to ensure the series' status is now *Pending System Admin Approval*.

If you have requested additional edits via comments in any section of the Study record, click **Save & Reject** at the top of the page. Check to ensure the series' status is now *Rejected.*

Return to the ***Edit Series*** page by clicking **Back to Series** at the top of the page to continue your review of other studies.

Repeat steps for all series and studies to which you have access.

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

RESOURCES & ASSISTANCE

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