

2008 - 2009 Edition



EDMIS Users' Manual

Entrepreneurial Development Management Information System

EDMIS Users' Manual

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INTRODUCTION

The US Small Business Administration has developed the Entrepreneurial Management Development System (EDMIS) in order to collect counseling, training and economic impact information from each of our SBA partners and District Offices. EDMIS is a secure web portal that is designed around two primary forms: SBA Form 641 and SBA Form 888. SBA partners have the option of either manually entering their counseling and training data or using a software vendor to upload xml files.

SBA partners are required to provide counseling and training data at a minimum of quarterly. Users that upload data files should do so at least quarterly. Users that enter the data directly into EDMIS do so for each new session. SBA compiles the data in daily and quarterly reports that are used to measure counseling and training performance.

Section I – Accessing EDMIS

EDMIS is accessed via the General Logon System (GLS). Only users with an approved *user identification* and *password* will have operational access to EDMIS. To protect the integrity of the data, the system has a number of safeguards and is very secure. The system will automatically recognize an authorized user's identification code (ID & Password) and provide operational access to the EDMIS home page.

Login to EDMIS

1. Open a browser (e.g. Internet Explorer 5.0 or above with 128-bit encryption) and enter the following address on the address bar. (*Note: you must include an "s" after "http" as this is a secure system.*)

https://eweb.sba.gov/gls

Once you enter the above address you should see the following view:

U.S. Small Business Administration SBBAA Your Small Business Resource	Help
General Login System	You have successfully logged out. To return to any page in this system, you must log in again.
 Forgot User ID? Forgot Password? Instructions for GLS 	SECURE GOVERNMENT ACCESS ONLINE Login using existing E-Authentication Credential
 Request SBA User ID 	
Contact SBA Security	
• What is E- Authentication?	User ID: Password:
	Login Clear
Last modified: 03/06/2008 12:26:00 AM	FirstGov > E-Gov > Regulations.gov > White House SBA Processing: 0.054 second: * Privacy & Security * Information Quality * FOIA * No Fear Act * ADA

2. If you already have an SBA User ID and Password, skip to step 4. Otherwise continue here to obtain a User ID and Password. On the following screen shot, you will notice that on the left hand side there is a menu for several items, including instructions for GLS.

Select Request SBA User ID. You will be directed to a new page. You will need to fill out each item that is bordered in light blue. You may select your own user ID and it should be 8 characters long. Once you have completed this page, scroll to the bottom and click submit.

				Log	n Information
GLS Legin	User ID:				
				Ident	ity Information
	Name:	(First)	(Middle)	(Last)	(Suffix - Jr, Sr, I, II, etc)
	Date of Birth:	(mm	(dd/yyyy)		
	PIN:	(Personal	Identification Number, I	Last 4 Digits of SSN)	
	(1.1.4.4)P.				
				Cont	act Information
	Country:	UNITED STATES			
	Zip+4 Code:		Lookup Zip		
	Street 1:				
	Stand 2				
	G11691.4.				
	SHOLL ST				
	City Name:			(State)	
	City Name:			(State)	
	City Name:			(State)	
	City Name: Phone Number:	(Country) (Area Code) (P) (US is 1) (P)	ione Number) (Extension) 9-9999)	(State)	
	City Name: Phone Number:	(Country) (Area Code) (P) (US is 1) (St	ione Number) (Extension) 9.9999)	(State).	
	City Name: Phone Number: E-Hail Address:	(Country) (Area Code) (P) (VS is 1) (S 1	none Numberj (Extension) 9.9999j	(State)	

Once you have submitted the request for a User ID, you will receive an e-mail from ITSecurity@sba.gov with a temporary password. You can return to the main login screen and enter the User ID and Password. First time users will be prompted to change their passwords to an 8 character password that contains at least 3 of the following elements:

- 1 Capital Letter
- 1 Lower Case Letter
- 1 Number
- 1 Symbol

3. Once you have access through GLS, you will still need to obtain access to EDMIS. While you can request this access yourself, you will need to know your Location ID (from SBA's Partner Information Management System). It is recommended that you contact your program manager via e-mail requesting access. You should also send a

copy of the e-mail to <u>SBDCEDMIS-II@sba.gov</u>. You will need the following information:

- Name, E-mail, and User ID
- Name and Address of your
- Organization type (SBDC, WBC, etc.)

You will receive notification from <u>ITSecurity@sba.gov</u> that you have been given access rights to EDMIS.

3. You can now proceed to log in from https://eweb.sba.gov/gls. When you log into GLS with your password, you will first come to a welcome screen. Click OK to proceed.

Your Small Business Resource eral Login System	Terms and Conditions
	Welcome
 This is a Federal compute only. 	r system and is the property of the United States Government. It is for authorized use
 This web site employs so attempts to upload inform damage. 	tware programs to monitor and audit network traffic and thereby identify unauthorized ation, unauthorized attempts to change information, or attempts to otherwise cause
 Captured data may be dis and/or authorized officials 	closed at the discretion of authorized SBA personnel to law enforcement personnel of other agencies who may need access to investigate a potential security incident.
 Unauthorized use of this s constitute a violation of 18 and/or administrative action these terms and condition 	system or use that exceeds the users authorized access privileges is prohibited and ma U.S.C 1030 or other Federal laws and regulations and may result in criminal, civil, in. By continuing to use this system, you indicate your awareness of, and consent to, s.
LOG OFF IMMEDIATELY accept the terms and proc	if you do not consent to the conditions stated in this notice. Otherwise click OK to seed.

After you click OK, you should see a link for EDMIS if you have been given access to the system.

U.S. Small Business Administration	Exit	Help		
SBA	Profile	Access	Choose Change Function Password	
Your Small Suclease Assource				
General Login System	Welcome B	kuce Purdy, Li	cellon	
				General Login System - Choose Function
				Applications available with the present login
Entrepreneutial Developm	nent Mana	agement Inf	ormation System (EDMIS II)	
				Do you wish to Update Profile?

Clicking on the link will bring you to the main page for EDMIS. The page will appear different depending on your access rights. Following is an example of a main page for a Women's Business Center.

Once you get to this point, you are now ready to enter or upload EDMIS data. From the Menu Bar on the left as seen above, the functions are:

- Add Counseling or Training data
- Search / Edit / Print Counseling or Training data
- Upload Counseling or Training data
- Upload Status Counseling or Training data
- Reports
- Economic Impact

Section II - Manually Entering Data into EDMIS

Adding 641 Part I - Request for Counseling

The add feature works in a similar fashion for both the 641 and 888. To add a new 641, click the link for Counseling (641) under the section for Add. All fields presented in **BOLD font and outlined in blue are mandatory fields and must be completed.**

Following are images of the actual data entry screens.

U.S. Small Business Administration SBBAA Your Small Business Resource	Print Exit
EDMIS II	
Add	Request for Counseling (Form 641 Part 1 & 2)
Counseling (641) Training (888)	Bold indicates required fields
C	1. Location Select a location
Search / Edit / Print Counseling (641) Training (888)	1a. Type of Client Select a type of client
Upload	Partner Client Number
Training (888)	Part I: Client Request for Counseling
Upload Status	3. Client Name
Counseling (641)	Last Name
iraining (888)	First Name
Reports Management Operational	Middle Initial
Economic Impact Add	4. Email
Search/Edit/Print	5. Telephone
	Primary
	Secondary
	6. Fax
	7. Address / PO Box
	Country: UNITED STATES
	Zip/Zip+4: Lookup Zip
	Street 1
	Street 2
	City: State:

1. Location - For SBA users this is the field/branch office code, the system populates this information; For Resource Partners this is the location code of the office/service center providing the counseling

1a. Type of Client – the type of counseling being provided, i.e. face-to-face, online, etc. 2. Partner Client Number – (not used by Field Offices); Resource Partners may input their internally assigned number.

- 3. Client Name (Part 1: Client Request for Counseling) -
- 4. E-mail
- 5. Phone
- 6. Fax
- 7. Street/P.O. Box Address of client
- 8. City
- 9. State

10.	ZIP	Code	+4	if	available
TO.		Cout	1 7	11	avanable

Add Counseling (641) Training (888)	11. Agreement Indicator C Yes C No
Search / Edit / Print Counseling (641) Training (888)	Date (MM/DD/YYYY) Time (HH:MM) (24-hour clock)
Upload Counseling (641) Training (888)	13. Client Signature and Date Client signed Ores ONO
Opload Status Counseling (641) Training (888)	Date (MM/DD/YYYY)

11. Agreement Indicator – This field reflects that the client has signed the form

agreeing to the following statement. I request business counseling service from the Small Business Administration (SBA) or an SBA Resource Partner. I agree to cooperate should I be selected to participate in surveys designed to evaluate SBA services. I permit SBA or its agent the use of my name and address for SBA surveys and information mailings regarding SBA products and services (Yes No). I understand that any information disclosed will be held in strict confidence. (SBA will not provide your personal information to commercial entities.) I authorize SBA to furnish relevant information to the assigned management counselor(s). I further understand that the counselor(s) agrees not to: 1) recommend goods or services from sources in which he/she has an interest, and 2) accept fees or commissions developing from this counseling relationship. In consideration of the counselor(s) furnishing management or technical assistance, I waive all claims against SBA personnel, and that of its Resource Partners and host organizations, arising from this assistance.

- 12. Preferred date and time of appointment
- 13. Client Signed (Required) did the client sign the 641 form?Date (Required) what is the date the client signed the 641?

Adding 641 Part II - Client Intake (to be completed by all Clients) Questions 14-19

art II: Client Intake (to be completed by all Clients)		
14. Race (mark one or more)		
🗖 Black or African American	Unanswered	
🗖 American Indian or Alaska Native	🗖 White	
🗖 Asian	🗖 Native Hawaiian or Other Pacific Islander	
15. Ethnicity		
O Hispanic or Latino	O Unknown(NotStated	
Not Hispanic or Latino		
16. Gender		
C Female	O Unknown/NotStated	
© Male		
 Male 17. Do you consider yourself a person with a di C Yes C No 	isability?	
 Male 17. Do you consider yourself a person with a di Yes No 18. Veteran Status 	isability?	
 Male 17. Do you consider yourself a person with a di Yes No 18. Veteran Status Non-Veteran 	isability? C Unknown/Not Stated Unknown/NotStated	
 Male 17. Do you consider yourself a person with a di Yes No 18. Veteran Status Non-Veteran Service Disabled Veteran 	isability? Unknown/Not Stated Unknown/NotStated Unknown/NotStated Veteran	
 Male 17. Do you consider yourself a person with a di Yes No 18. Veteran Status Non-Veteran Service Disabled Veteran 18a. Military Status 	isability? C Unknown/Not Stated O Unknown/NotStated O Veteran	
 Male 17. Do you consider yourself a person with a di Yes No 18. Veteran Status Non-Veteran Service Disabled Veteran 18a. Military Status Member of Reserve or National Guard 	isability? Unknown/Not Stated Unknown/NotStated Veteran Unknown/Not Stated	

19. What inspired you to contact us? (mark all that apply) SBA Bank Business Owner Television/Radio Other Client	Newspaper Chamber of Commerce Educational Institution Local Economic Development Official Word of Mouth	
Other Client Magazine Internet	Vvord of Mouth Unknown/Not Stated Other	
Other media (specify)		
20. Is the Client Currently in Business? (If no, skip to 30)		

20. Is the client currently in Business? (If "yes" then fields 22–29 are required)

21. Name of Company	
· · · ·	
22. Type of Business (choose primary category)	
C Agriculture, Forestry, Fishing and Hunting	C Real Estate and Rental and Leasing
C Mining	O Professional, Scientific, and Technical Services
C Utilities	O Management of Companies and Enterprises
C Construction	O Administrative and Support and Waste Management
C Manufacturing	and Remediation Services
C Wholesale Trade	C Educational Services
O Retail Trade	O Health Care and Social Assistance
C Transportation and Warehousing	O Arts, Entertainment, and Recreation
O Information	O Accommodation and Food Services
C Finance and Insurance	O Other Services (except Public Administration)
	O Public Administration
Note: Administrative and Support, Waste Management and Rema	ediation Services have the same NAICS code in the NAICS Table and
hence appear together.	
23. Business Ownership	
Male %	Female %
24. Business Started	
Month (MM)	Vear
27. Total Number of Employees	
(full & part time)	
	2011.
20. For your most recent fun business year, what were y	
Gross Revenues/Sales \$	
+Profits/-Losses \$	
O Sole Proprietorship	C Limited Liability Company(LLC)
O Partnership	O Subchapter S Corporation
O Corporation	O Other
Other legal entity (specify)	

30. What is the nature of counseling you are seeking?-		
O Start-up Assistance	O Government Contracting	
O Business Plan	O Franchising	
C Financing/Capital	O Buy/Sell Business	
C Managing Business	C Technology/Computers	
C Human Resources/Managing Employees	O eCommerce	
C Customer Relations	O Legal Issues	
C Business Accounting/Budget	O International Trade	
C Cash Flow Management	C Unknown/Not Stated	
C Tax Planning	C Other	
C Marketing/Sales		
C Marketing/Sales Other counseling (specify) Submit Reset		

30. What is the nature of counseling you are seeking? – Primary or dominant counseling category is chosen.

Question 30 is the last question for Parts I and II. Click submit and a new Part III will open.

Adding 641 Part III - Counselor Record

31, 32, 34, 36, 37, 38 are populated from SBA Form 641, Pa	art I
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Counseling Information Form (Form 641 Part 3)		
Bold indicates required fields		
Partner Session Number		
31. Client Name		
LastName		
First Name		
Middle Initial		
32. Email		
33. Telephone		
Primary		
Secondary		
34. Fax		

35. Address	s / PO Box			
Country:	UNITED STATES			
Zip/Zip+4:			Lookup Zip	
Street 1				
Street 2				
City:	City: VA			
39. Is the clie to 44)	39. Is the client Currently in Business? (If no, skip Cyes © No to 44)			
Business Ir	nformation			
40. Busir	ness Started			
Month	(MM)		Year (YYYY)	
41. Total Number of Employees (full & part time)				
42. As of	the most recent oun:	seling date and f	for the most reent business year, what are the client's annual:	
Gross Re	venues/Sales \$		+Profits/-Losses \$	
43. SBA or Resource Partner Servie Contributed to the following:				
Total Am	ount of SBA Loans		No. of Government Contracts or Subcontracts	
Total Am Loans \$	ount of Non-SBA		Dollar Value of Government Contracts Received \$	
Amount of Received	of Equity Capital		Did counseling received result in starting a O Yes O No business?	

39. Is the client currently in Business? – If answer is **"Yes"** then user must complete **40, 41** and the last question in block **43**.

O Start-up Assistance	C Government Contracting	
O Business Plan	O Franchising	
C Financing/Capital	O Buy/Sell Business	
O Managing Business	C Technology/Computers	
O Human Resources/Managing Employees	O eCommerce	
C Customer Relations	O Legal Issues	
O Business Accounting/Budget	O International Trade	
C Cash Flow Management	O Unknown/Not Stated	
O Tax Planning	O Other	
C Marketing/Sales		
lease specify other counseling provided		

i.

- **44. What was the nature of the counseling you provide d the client?** User can only select one
- **45. Type of counseling?** select from the drop down

46. Language(s) used		
English	C Other	
🗖 Spanish		
Other Language (specify)		
47. History		
C New Case	C Case Close Out	
C Follow-up	C One Time	
48. Date Counseled	(MM/DD/1111)	
49. Counselor(s) Name		
50a. Contact Hours		
50b. Prep Hours		
50c. Travel Hours		
51. Did more than one person attend the counseling	C Yes C No	
	If yes, how many attendees ?	
52. Counselor's Notes		
	T	
	characters left. Maximum 1000 Characters.	
Q,	Ihmit Reset	
	TOOL TOOL	

- **46. Languages used?** –The language spoken during the counseling?
- 47. History
- 48. Date Counseled
- 49. Counselor(s) Name
- **50a.Contact Hours**
- **50b. Prep Hours -** if none, then input zero
- **50c. Travel Hours** if none, then input zero

NOTE: In fields pertaining to dollar amounts, do not input \$ signs, commas, or decimal points. The field will accept a minus (-) sign to indicate a negative integer.

Adding a Management Training Report (888) Just like with the 641, all fields bordered in blue must be completed in order to submit the 888.

	Management Training Report
3old indicate	s required fields
- 1. Location	
	Select a location
Partner Tra	ining Number
-2. Program	- Format
Select	a Program Format
— 3. Training	Details
Training	
Title:	
Date:	(MM/DD/YYYY)
Number	
Sessions	
Total Training	
Hours	
-4 Location	of Training
Gountar	
country.	
Zin/Zin+4:	Lookup Zip

1. Location - This For SBA users this is the field/branch office code, the system populates this information; For Resource Partners this is the location code of the office/service center providing the training.

Partner Training Number (Not used by Fields)

- 2. Program Format Was the training a seminar, a course, online or Teleconference?
- 3. Training Details
- 4. Location of Training

5. Total Number Trained	- 6 Minorities Trained
Currently in Business	Race:
Not Yet in Business	Black or African American
People with Disabilities	American Indian or Alaska Native
Women	White
Total Veteran	Native Hawaiian or Other Pacific Islander
Service-Disabled Veterans	Ethnicity:
Members of Reserve or National Guard	Hispanic or Latino
Total Number Trained	
7. Language(s) Used English Spanish Other :	
8 Training Topic	
 Start-up Assistance Business Plan Financing/Capital Managing Business Human Resources/Managing Employ Customer Relations Business Accounting/Budget Cash Flow Management Tax Planning Marketing/Calas 	Government Contracting Franchising Buy/Sell Business Technology/Computers eCommerce Legal Issues International Trade Unknown/Not Stated Other :

- 5. Total Number Trained6. Minorities Trained if none, then input zero
- 7. Language(s) Used
- **8. Training Topic** (primary topic only)

9. Resource Partners Participating	
 SCORE SBDC Women's Business Center VBOC Educational Institution Chamber Of Commerce Trade or Professional Association 	 For-Profit Organization Online Training Resource SBA District Office Native American Center SBA : Other Government Agency : Other :
10. Attendee Fee	
number of attendees	fee/attendee Total
Full Fee:	\$ 0.00 \$ 0.00
Discounted Fee:	\$ 0.00
No Fee:	\$ 0
No Show Income:	\$ 0.00 \$ 0.00
Other Income:	\$ 0.00
TOTAL Income:	\$ 0.00
11. What is the dollar amount of fees that your organ \$ 0.00	ization received?
12. Sponsor(s) Name of Sponsor:	Name of Co- Sponsor:
Submit	Reset

- 9. Resource Partners Participating
- **10. Attendee Fee Information**
- **11. Total Dollar Amount of Fees Received for Event**
- 12. Sponsor and Co-Sponsor Names.

Section III – Uploading XML Data Files

Uploading Files

For SBA Partners that are using a software package to collect 641 and 888 data, on a quarterly basis, they will need to log into GLS to access EDMIS (Section I) and click on the Upload link for either Counseling (641) or Training (888).

Before you can upload a file, the file must comply with the xml schema and data requirements. The latest version of these can be found at http://www.sba.gov/private/edmis2/private. If you are using a software vendor, they should be familiar with these documents and should have the capability of creating the correct xml. You should consult with your software vendor for more details regarding how they create the xml file.

Once your system has the capability of creating an appropriate xml file, you will be able to upload data files quarterly as opposed to manually entering each record. The following image is a display of results from selecting the Counseling (641) link.

LL Start Referen Advisition of the Start S	Print Exit	
Add Counseling (641) Training (888) Scarch / Edit / Print	Uploa If the file size is greater than 8 MB, plo	act 641 file ease Zip the XML file and upload the Zip file.
Counseling (641) Training (688)	File to upload:	Erowse
Upload Counseling (541) Training (588)	<u></u>	Jeload
Upload Status Courseling (541) Training (688)	Last modified: 10/24/2007 12:01:47 PM	SBAProcessing: 0.33 seconds Version: 2.0

Locate the xml file that you wish to upload. Click on the Browse button, select the file to upload and click the Open button.

File Upload					? ×
Look in:	Local Disk (C:)	•	🗕 🖻 💣 🎟	•
History Desktop My Documents My Computer	Borland CFusionMX Documents and imis Program Files QUARANTINE rafi SITES SITES Sun	l Settings	WINNT WUTemp AUTOEXEC.BAT CONFIG.SYS apmd8377.bin TrackitAudit.id		
	File name:	Untitled7	/.xml	•	Open
My Network P	Files of type:	All Files		•	Cancel

The screen which has the address of the file will appear. Click on the upload button.

U.S. Swell had near 14 and average SBBAA Face A face of the face	Print Exit	
Add Counseling (541) Training (888)	Upload 641 fi	le
Search / Edit / Print Counseling (541) Training (888)	If the file size is greater than 8 MB, please Zip the File to upload: [C.Y.Unlitle7, xm]	e XML file and upload the Zip file. Browse.
Jpload Counseling (541) Training (388)	Upload	
Upload Status Counseling (541) Training (888)	Last modified: 10/24/2007;12:01:47 PM - SBA Proce	essing: 0.33 seconds Version: 2.0

Once the user clicks on the upload button, a screen will appear that indicates the file successfully uploaded and that email confirmation will be sent once the file has been processed.

Note: Users can expect to receive email confirmation the day after submitting the file.

Checking the Upload Status

The user can log into EDMIS and view the upload status of the file from the EDMIS menu. The user will be asked to input a date range; this range is for date of upload, not for record dates (as in the screen below).

EDMIS II	
Add Counseling (541) Training (888)	641 Upload Status
Search / Edit / Print Counseling (541) Training (588)	Please enter the File Upload begin and end dates. File Upload Start Date:(MN/DD/YYY)
Upload Counsaling (641) Training (888)	File Upload End Date: 04M/DD/YYY)
Upload Status Counseling (541) <u>Training (583)</u>	Last modified: 10/24/2007 12:01:57 PM SBA Processing: 0.072 seconds Version: 2.0

The upload status will indicate if the file has been processed or not. If the file has been processed it will give the summary information of number of successfully loaded records and number of failed records. It will also have a link to the error file if there were any errors.

641 Upload Status								
File Name	Status	Upload Date	Process Start Date	Process End Date	Successful Records	Fail Records	Error File	
WithPartnerClientNum.xml	Pending	6/13/2008 4:25:13 PM						

Last modified: 10/24/2007 12:01:38 PM SBA Processing: 0.32 seconds Version: 2.0

General Guidelines for Submitting 641 Records

- 641 clients have different sets of required fields depending upon the Type of Client classification (Face-to-face, Telephone or Email). Refer to Data Requirements. All of the required fields must be completely filled in for the record to be successfully loaded into the database. The XML document must include default values as documented in "Data Requirements Documents" if there is no data collected for the data elements.
- 641 Part 1, 2 and 3 is required to input the first record for a client in the database.
- 641 Part III records may be submitted without their parent Part I & II record(s) provided the Part I & II already exists in EDMIS (i.e. it was previously loaded). This option will help reduce the file size of the XML update files
- The 641 Part I & II are only loaded once into EDMIS for each client with sessions spanning multiple years of service, i.e. do not add the same client each new fiscal

year with a different unique Partner Number, EDMIS reports will reflect annual activity based on the 641 Part III records.

- 641 Part I & II records may be updated to reflect new or revised information. Only Type of Client and Client Registration Date (Client Signature Date) cannot be modified after the end of a fiscal year.
- 641 Part III cannot be modified after the end of a fiscal year.
- 641 Part III, Field 47 History has the following values: New Case, Follow-up, Case Close Out, or One Time
 - For any single client, there should only be one session (Part III) designated as "New Case" over the lifetime of that client
 - Case Close Out session(s) will not increment client counts nor counseling hours in SBA reports
- 641 Part III data will automatically change a client's existing Part 1& 2 data in the EDMIS database. Resource partners could submit revised Part I & II records to revise Part I & II information for clients.
- If a new case session already exists for a client in the database, then 641 Part III of a New Case session has to be supplied along with 641 Part I & II to modify the Client Type before the end of the fiscal year.
- If there is no existing new case session for a client in the database and a new case session is being added then the Counseling Type of this new case session has to match with the existing Client Type in the database.
- If a new case session already exists for a client in the database and this 641 Part III is being modified before the end of the year then Counseling Type of this new case session has to match with the existing Client Type in the database.
- 641 Part I & II, 641 Part III of the new case session have to be supplied to modify the Counseling Type of the new case session before the end of the fiscal year.

In EDMIS, records can be added, edited or deleted by setting the record's 'Active Indicator' to "A" for Active or "I" for Inactive. The "A" designation is used for either inserting new records or editing existing records. The "I" designation will make active records inactive and is similar to a delete action. Deleted records are not actually removed from the SBA database but are no longer available to reports or search actions.

Deleting 641 Records

- To delete a 641 Part I & II Client, submit the client record and only the following fields are required:
 - 1. Partner Client Number
 - 2. Location Code for the Resources Partner or Office Code for the Field Office
 - 3. Client Active Indicator = "I"

Deleting the 641 Part I &II Client record also deletes any associated counseling session for that client. It is a cascading delete.

- To delete a 641 Part III counseling session, submit the session record and only the following fields are required:
 - 1. Partner Client Number
 - 2. Partner Session Number

- 3. Location Code for the Resources Partner or Office Code for the Field Office
- 4. Session Active Indicator = "I"

Note: Records cannot be deleted after the end of the Fiscal Year. **The only session (641 Part III) of a client cannot be deleted**

General Guidelines for Submitting 888 Records

- 888 has required fields depending upon the Data Requirements. All of the required fields must be completely filled in for the record to be successfully loaded into the database. The XML document must include default values as documented in "Data Requirements Documents" if there is no data collected for the data elements.
- 888 cannot be modified after certification.

Deleting 888 Records

To delete an 888 record, submit the record and only the following fields are required:

- 1. Partner Training Number
- 2. Location Code for the Resources Partner or Office Code for the Field Office
- 3. Training Active Indicator = "I"

Note: Quarterly uploads are due 30 days after the end of the Fiscal Quarter. SBA allows a 5 day grace period to allow for data error corrections. If you can not meet the deadline, you need to immediately contact your program manager for your program. That manger can make the determination whether to allow additional time for an upload.

Email Confirmation Reports

Email Confirmation Reports for 641

There are two reports Summary Report and Error Report that will be emailed to the user's email address in the GLS system.

If the size of the Error Report is greater than 500K then it will not be sent as an attachment. The confirmation email will have the name of the error file, a link to the EDMIS website and the following statement:

The error file is too big to be sent as an attachment. Please log in EDMIS and click on Upload Status to view the error file.

NOTE: The dates to input in the search fields are UPLOAD dates not record dates.

- The Summary Report has the following details
 - 1. Number of successfully loaded records
 - 2. Number of rejected records.
- The Error Report has all the rejected records with the following details.
 - 1. Record Number
 - 2. Partner Client Number
 - 3. Partner Session Number
 - 4. Location ID / Office Code
 - 5. Explanation of the failure

Email Confirmation Reports for 888

There are two reports Summary Report and Error Report that will be emailed to the user's email address in the GLS system.

If the size of the Error Report is greater than 500K then it will not be sent as an attachment. The confirmation email will have the name of the error file, a link to the EDMIS website and the following statement:

The error file is too big to be sent as an attachment. Please log in EDMIS and click on Upload Status to view the error file.

NOTE: The dates to input in the search fields are UPLOAD dates not record dates.

- The Summary Report has the following details
 - 1. Number of successfully loaded records
 - 2. Number of rejected records.
- The Error Report has all the rejected records with the following details.
 - 1. Record Number
 - 2. Partner Training Number
 - 3. Location ID / Office Code
 - 4. Explanation of the failure

Section IV – Entering Additional Impact Data

Both the Women's Business Center and Small Business Development Center programs require each of the partners to provide some impact data that is separate from the 641. The screen images from each are provided below. Partners should consult the program announcement for specific guidance on providing this information.

Economic Impact Screen for WBC's

U.S. Smoll Business Administration SSBBAA Your Small Business Resource EDMIS II	Print Exit
Add Counseling (641)	Add Economic Impact
Training (888)	Bold indicates required fields
Search / Edit / Print	Location 🔽
Counseling (641) Training (888)	Fiscal Year
Upload Counseling (641)	Jobs Created
Training (888)	Businesses
Upload Status	Created
Counseling (641) Training (888)	Gross Receipts of Assisted
Reports	Increases or
Management Operational	decreases in
Economic Impact Add Search/Edit/Print	Concerns Submit

Economic Impact Screen for SBDCs

U.S. Small Business Administration SBBA Your Small Business Resource EDMIS II	Print Exit
Add Counseling (641) Training (888) Search / Edit / Print Counseling (641) Training (888)	Add Economic Impact Bold indicates required fields Location Fiscal Year
Upload Counseling (641) Training (888) Upload Status Counseling (641) Training (888)	Jobs Created Jobs Retained Sales \$
Reports Management Operational Economic Impact Add Search/Edit/Print	Taxes Federal Federal State St
	SBA Loan Dollars Number of Non SBA Ioans
	Loan Dollars Equity Capital Submit

Section V – Using EDMIS to Locate and Edit Records

Search / Edit / Print 641

This screen allows the user to Search a previously entered 641. Any records that match the criteria selected will be returned.

U.S. Seed Torses Administration SEBERAT Tour Small Realises Reserve EDMIS II	Exit
Add Counseling (541) Training (583)	Search Function
Search / Edit / Print Courseling (541) Training (888)	Last Name
Upload Counseling (641) Training (688) Upload Status Counseling (641) Training (688) Reports Management Operational	Counseling Date Begin Date End Date (MM/CD/VYYY) Search
Economic Impact Add Search/Edi⊍Print	SB4 Citerri Number Search
	Partner Oliant Number Search

Last Name – If the user knows the client's last name this field can be used to search Counseling Date – If the user wants to search by date range search then the begin and end dates of the range are entered here.

SBA Client Number– Users may also search using the system assigned SBA Client Number

Partner Client Number – Resource partners may search by their internal Client number, if they input that number in the database.

The Search results will show the Parts I and II (highlighted in yellow) and each part 3 with the respective session number. From this search results screen you can update, delete or print the 641 information by clicking on the icons associated with each file.

Search Result Records

Your Search returned 1 Client records and 2 Counseling records. Please Click here to perform a new search.

	Search Result									
Update	Delete	Print	Add Counseling Session	SBA Client Number	SBA Session Number	Location Code	Partner Client Number	Partner Session Number	Last Name	First Name
3	۵	e	Ē	458838		475844	wbc1		Lyford	Chancy
0	\boxtimes	÷			1				Lyford	Chancy
0	\boxtimes	÷			2				Lyford	Chancy

Search / Edit / Print 888

Search Function - 888	
Training Title Search	
Training Date Begin Date (MM/DD/YYYY)	
End Date (MM/DD/YYYY)	
SBA Training Number Search	

Training Title – User may search by the title of the training

- **Training Date** If the user wants to search by date range search then the begin and end dates of the range are entered here
- SBA Training Number User may search using the system assigned SBA Training Number

Section VI – Accessing Reports

Management Reports

SBA has two types of reports that are used both by SBA and by our partners. These reports display quarterly or daily data (depending on your selection). Quarterly reports are static pages that are created after the end of each quarter. They are generally available around the 10th of the month following a quarterly upload. Daily reports are updated each night and should contain the most recent data.

The first set of reports is called Management Reports. You may also choose to view these as HTML files or as downloadable Excel files. These reports focus on management impact and demographics.

	Print Exit		
EDMIS II			
Add Counseling (641) Training (888)	EDMI	SII - Management Reports	
Search / Edit / Print Counseling (641) Training (888)	Report Maiagement impact	Excel Format	HTML Format
pload	Management Demographic	×	HTML
Training (888)	Management In-Business	M	HTML
Upload Status Counseling (641) Training (888)	Management Nascent	×1	HTML
Reports Management Operational			

Selecting either the HTML or Excel format will bring up a screen that allows the user to select various search criteria.

U.S. Small Business Administration SBBA Your Small Business Resource EDMIS II	Print Exit	
Add Counseling (641)	м	anagement Impact Report in html Format
Training (888)		Data Entered By
Search / Edit / Print Counseling (641)	Lead Location	
Training (888)		Data Entered For/Credited To:
Upload	Regional Office:	All
Counseling (641) Training (888)	District Office Code:	
Upload Status	State:	All
Training (888)	Congressional District:	All
Reports Management	Summary:	Daily
Operational		Cultura
Economic Impact Add Search/Edit/Print		Submit

Operational Reports

The purpose of the Operational Reports is to verify the data in the xml file upload. Each data field is displayed for every record within the selection parameters. This report is very useful in trying to trouble shoot errors.

EDMIS II			
ld Counseling (641) Freining (888)		EDMIS II - Operational Reports	1
arch / Edit / Print Counseling (641) Training (688)	Report 641 (parts 1 and II)	Excel Format	HTML Format
ad unseling (541) sining (888)	641 (part III) 555	¥) ¥]	HTML
ad Status runseling (641) aining (888)	<u> </u>		

Examples of the various report formats are included in Appendix B.

Appendix A – Additional Resources

Useful Web Links

- <u>https://eweb.sba.gov/gls</u> This is the main page used to access EDMIS. You can request a User ID and request a password from this link as well. If you are having trouble accessing the system, you should contact your point of contact for your program.
- <u>http://www.sba.gov/private/edmis2/private</u>- This site is the repository for EDMIS information including: data requirements, xml schema, client definitions, and other documents relating to EDMIS.
- <u>http://web.sba.gov/list/</u> From the Newsletter page, you can sign up to be on the EDMIS listserv. This Listserv is used by SBA to send out messages regarding EDMIS.
- <u>SBDCEDMIS-II@sba.gov</u> This is an e-mail box set up for all EDMIS questions. When you send an e-mail to your program point of contact regarding EDMIS, please also include a copy to this to ensure that the EDMIS project officer also receives a copy.

Appendix B – Report Examples

		Man	agement	Report							
			Type: Impa	ct							
Snapshot	2008 - Quarter 2	0									
Report Date	05/08/2008 4:	00 AM									
Data Entered By: User Type	AII										
Data Entered For/Credited To:											
Regional Office	AII										
District Office State	AII AII										
Congressional District	AII										
	2008 Q1	2007 Q1	2008 Q2	2007 Q2	Е 2008 Q3	iscal Year 2007 Q3	2008 Q4	2007 Q4	FY To Date	Prior FY Total	
Performance Measurements (Outcomes)											
Jobs Created/Retained Jobs Created Jobs Retained S Amount of Gross Revenues/Sales S Amount of Revenue Growth Number of New Business Starts S Amount of Capital Infusion \$ Amount of New SBA Loans S Amount of New SBA Loans	2709 906778199.8 182172540 371928590 3355677069.8	2012 2012 705385154 155660092.9 295441013.3 254284047.3	2500 753405415 145601809 280834696 3	2242 2242 162062307.4 3490832	00000	2493 24476370.8 186513058 3865430438 301562874.9	00000	2555 885435899 252658844.3 399730237 233046817.8	6606 9296 10209456000 -930984000 5209 1660183615 327774349 652763286.9	10476 13416 13416 10819000 695000 9302 3181776392 756894302.5 1430653943 994271446.8	
				0.001	5		>			0.01	
Terrormance measurements (Outputs) Total Number of Clients Served	439413	367529	442170	385031	•	385822	•	283866	881583	1422248	
Counseling Total Number of Clients Counseled	122255	130644	106716	119409	0	105500	0	87938	228971	443491	
Total Number of Extended Engagement Clients Counseled Total Number of Long Term Clients Counseled Total Hours of Clients Counseled	26826 15787 379186.82	21104 15459 401545.06	14864 17579 398803.09	13135 17968 419364.04	000	12579 17660 436899.39	000	11453 16274 375210.11	41690 33366 777989.91	58271 67361 1633018.6	
Average Hours per Client Counseled Average Hours per Session	3.09 1.74	3.07 1.78	2.94 1.65	2.83 1.67		3.02 1.75		2.9 1.66			
Training Total Number of Training Attendees Total Number of Training Hours	317158 56197.7	236885 53568.1	335454 56105.3	265622 54508.33	0 0	280322 55760	00	195928 46307.2	652612 112303	978757 210143.63	
Total Number of (Training Hours * Total number trained) Total Number of Training Sessions	2480367 29682	2664605.2 20677	1201805.2 30294	1204184.88 22108	0 0	1875418 30505	0 0	950458.4 22510	3682172.2 59976	6694666.48 95800	
Portfolio Snapshot											
Total Number of Nascent Entrepreneurs Total Number of In-Business Clients	76060 46195	83894 46749	71611 35105	82019 37390	000	74531 30969	000	60872 27066	147671 81300 07000	301316 142174 52524	
roral number of business start-ups Cilents Total Number of Online Counseling Clients	12039	21919	18986	13930 24531	0 0	22129	0 0	13224	33490	81803	

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		Mana	gement Re	sport							
		Typ	e: Demograph	ji						l	
Snapshot Report Date	2008 - Quarter 2 05/08/2008 4:00	AM									
Data Entered By: User Type	AII										
Data Entered For/Credited To:											
Regional Office	All										
District Office State	AII AII										
Congressional District	AII										
	2008 Q1	2007 Q1	2008 Q2	2007 24 Q2	Fiscal 008 Q3	Year 2007 2 Q3	008 Q4	2007 Q4	FΥ Το Date	Prior FY Total	
Breakdowns											
Gender											
Women Counseled	50883	5023	40871	44904	0 0	39896	0 0	36388	91754 020001	171411	
women Irtained Women Counseled and Trained	134995	152036	179501	112303	0 0	112284 152180	0 0	81259 117647	213025	407039 579070	
Male Counseled Race	53830	55357	44137	48160	0	41174	0	36082	97967	180773	
Asians Counseled	4296	4439	3441	3737	0	3567	0	3109	7737	14852	
Asians Trained Asians Counseled and Trained	13897 18193	7526 11965	11610 15051	9262 12999	0 0	9187 12754	0 0	8049 11158	25507 33244	34024 48876	
Blacks or African Americans Counseled	19645	19923	17240	17697	0	16846	0	15143	36885	69609	
Blacks or African Americans Trained Blacks or African Americans Counseled and Trained	51008 70653	32232 52155	58588 75828	60230 77927	0 0	35476 52322	0 0	27898 43041	109596 146481	155836 225445	
Native American or Alaska Native Counseled	1720	1600	1562	1585	0	1304	0	1134	3282	5623	
Native American or Alaska Native Trained Native American or Alaska Native Counseled and Trained	4453 6173	2576 4176	5102 6664	2514 4099	0 0	3488 4792	0 0	2117 3251	9555 12837	10695 16318	
			1000		þ	1011	þ	1070	1004		
Native Hawaiians or other Pacific Islanders Counseled	937	866	913	945	0	802	0	737	1850	3482	
Native Hawaiians or other Pacific Islanders Trained Native Hawaiians or other Pacific Islanders Counseled and Trained	2297 3234	1230 2228	2388 3301	1680 2625	0 0	2145 2947	0 0	1616 2353	4685 6535	66/1 10153	
Whites Counseled	71844	73123	56379	62577	0	52549	0	47329	128223	235578	
Whites Trained	137288	95810	147090	113304	0	117099	0	81222	284378	407435	
Whites Counseled and Trained	209132	168933	203469	175881	0	169648	0	128551	412601	643013	

Management Report

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Snapshot Report Date	2008 - Quarter 2 05/08/2008 4:00 /	W									
"no response" race category	24613	31426	27987	33747	0	31283	0	21267	52600	117723	
Hispanic Origin Counseled Hispanic Origin Trained	10887 31116	12002 21244	9330 33114	10720 26755	000	9179 28645	000	7929 21944	20217 64230	39830 98588	
Hispanic Origin Counseled and Trained	42003	33246	42444	37475	0	37824	0	29873	84447	138418	
Ethnicity Clients "no response" Minorities Trained	33306 64889	40125 64272	35598 72811	43213 81587	0 0	38866 80035	0 0	28130 60273	68904 137700	150334 286167	
Disability											
Persons without a disability Counseled and Trained Persons with disability Counseled and Trained	407293 14189	335918 8501	407943 13258	352445 7709	00	354064 8322	0 0	261670 6618	815236 27447	1304097 31150	
Veteran Status											
Veterans Counseled	9156	9632	7202	8075	0	6907	0	6172	16358	30786	
Veterans Trained	27057	15424	25125	17206	0	19618	0	15285	52182	67533	
Veterans Counseled and Trained	36213	25056	32327	25281	0	26525	0	21457	68540	98319	
Service-Disabled Veterans Counseled	1270	1138	949	1057	0	908	0	859	2219	3962	
Service-Disabled Veterans Trained	4715	1738	4821	1727	0	2879	0	1794	9536	8138	
Service-Disabled Veterans Counseled and Trained	5985	2876	5770	2784	0	3787	0	2653	11755	12100	
Service Status											
Members of Reserve or National Guard Counseled	908	1341	767	1391	0	1102	0	1033	1675	4867	
Members of Reserve or National Guard Trained	3098	871	2736	565	0	1629	0	1150	5834	4215	
Members of Reserve or National Guard Counseled and Trained	4006	2212	3503	1956	0 0	2731	0 0	2183	7509	9082	
I otal Number of Clients on Active Duty Counseled	674	400	338	407	þ	544	Þ	787	103	1438	
Aggregates											
Total Number of Clients Counseled	122255	130644	106716	119409	0	105500	0	87938	228971	443491	
Total Number of Clients Trained Clients Counseled & Trained	317158 439413	236885 367529	335454 442170	265622 385031	0 0	280322 385822	0 0	195928 283866	652612 881583	978757 1422248	

Operational Report - 641 (parts I & II)

XXXXXX	-xxxxxxx	Small Busi	ness Deve Total I	elopment Records :	Center 7						
Location Id	SBA Client Number	Partner Client Number	Type of Client	Country Code	Zip / Postal Code	Agreement	Preferred date & time for appointment - Date	Preferred date & time for appointment - Time	Client Signature	Client Signature - Date	Race
			Face-to-								
XXXXXX	XXXXXXX	XXXXXXXX	face	NS	23669	Yes			Yes	3/1/2008	White
XXXXXX	X00000X	XXXXXXXXX	Face-to- face	NS	22942	Yes			Yes	3/3/2008	Black or African American
XXXXXX	XXXXXXX	X000000X	Face-to- face	NS	23420	Yes			Yes	3/3/2008	Black or African American
XXXXXX	XXXXXXX	XXXXXXXX	Face-to- face	SU	23451	Yes			Yes	3/3/2008	White
XXXXXX	X00000X	X000000X	Face-to- face	SU	22801	Yes			Yes	3/3/2008	White
XXXXXX	XXXXXXX	XXXXXXXX	Face-to- face	SU	24504	Yes			Yes	3/3/2008	White
XXXXXX	XXXXXXX	XXXXXXXX	Face-to- face	SU	24592	Yes			Yes	3/3/2008	Black or African American

Ethnicity	Gender	Person with disability?	Veteran Status	Military Status	What inspired you to contact us?	Currently in Business?	Name of Company	Type of Business	Business Ownershi p - % Male	Business Ownership - % Female	Month & Year Business Started?
Not Hispanic			Non-	Unknown/	Unknown/Not			Retail			
or Latino	Male	No	Veteran	Not Stated	Stated	Yes		Trade	100	0	Feb-07
Not Hispanic			Non-	Unknown/							
or Latino	Female	No	Veteran	Not Stated	SBA	No					
Not Hispanic			Non-	Unknown/	Unknown/Not						
or Latino	Male	No	Veteran	Not Stated	Stated	No					
Not Hispanic			Non-	Unknown/	Word of						
or Latino	Female	No	Veteran	Not Stated	Mouth	No					
Not Hispanic			Non-	Unknown/	Unknown/Not						
or Latino	Female	No	Veteran	Not Stated	Stated	No					
Not Hispanic			Non-	Unknown/							
or Latino	Male	No	Veteran	Not Stated	Bank	No					
Not Hispanic			Non-	Unknown/	Unknown/Not						
or Latino	Male	No	Veteran	Not Stated	Stated	No					ı

Operational Report - 641 (parts I & II) continued

Operational Report - 641 (parts I & II) continued

Street Address/P City State O Box																
e Fax																
elephon econdai																
T Telephone - - Primary S y																
Email																
Client Name			XXXXX		XXXXX		XXXXX		XXXXX		XXXXX		XXXXX		XXXX	
Specific Assistance Requested																
Nature of the Counseling Seeking?		Business	Plan	Start-up	Assistance	Business	Plan	Start-up	Assistance	Start-up	Assistance	Start-up	Assistance	Business	Plan	
Legal Entity of Business	Sole	Proprietor	ship													
res/ Losses			0		0		0		0		0		0		0	
Gross Revenu Sales			0		0		0		0		0		0		0	
Total No. of Employees			0													
Home Based Busin																
Conduct Business Online?			Yes													