
Installation Guide for

Direct Loan Tools for Windows

2003-2004

U.S. Department of Education



F E D E R A L
S T U D E N T A I D

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Introduction

Preface

Direct Loan Tools for Windows (DL Tools) is a multi-cycle application designed to help you perform the following tasks:

- Rebuild loan and disbursement data in EDEExpress using an automated process
- Compare the 732 and/or SAS reports to loans and actual disbursements recorded in EDEExpress or an external file, and compare to the DL Tools Cash Database
- Print the 732 and/or SAS reports in readable formats
- Track cash receipts (drawdowns) and returns of excess cash for Direct Loan

This release of DL Tools was developed to process data for multiple cycles. Version 3.0 contains Rebuild and Cash Management functionalities for the 2000-2001, 2001-2002, 2002-2003, and 2003-2004 cycles, and Compare functionality for the 2001-2002, 2002-2003 and 2003-2004 cycles. All Direct Loan schools can use the Compare and Cash Management functionalities. The Rebuild process is for schools to rebuild an EDEExpress database in the Direct Loan module. DL Tools has the same "look" and "feel" of EDEExpress.

See the "What's New for 2003-2004" pull-down menu item under **Help** for a comprehensive list of product enhancements.

DL Tools Features

Imports

You can import the following data files:

- Rebuild

When selecting the Rebuild import type, you have three options to choose. You can perform these functions with the 2000-2001 (EDEXpress v6.x), 2001-2002 (EDEXpress v7.x), and 2002-2003 (EDEXpress v8.x) records:

- Compare Only
 - Update All
 - Update Selected Records
- 732 Loan Detail and Cash Detail (2001-2002 only)
 - 732 Cash Summary (2001-2002 only)
 - School Account Statement (SAS) (2002-2003 and 2003-2004 only)
 - Disbursement Detail External Add (2002-2003 and 2003-2004 only)
 - Cash Detail External Add
 - Loan Detail External Add (not available for 2000-2001)

Reports

The following reports are available in DL Tools. To print some reports, you must have a connection to the Direct Loan database of EDEExpress.

- Cash Report
- Cash Detail Comparison (not available for 2000-2001)
- Loan Detail Comparison - Loan Level (not available for 2000-2001)
- Disbursement Detail Comparison (2002-2003 and 2003-2004 only)
- 732 Cash Detail (2001-2002 only)
- 732 Loan Detail (2001-2002 only)
- SAS Cash Detail (2002-2003 and 2003-2004 only)
- SAS Loan and Disbursement Detail (2002-2003 and 2003-2004 only)
- Disbursement Measurement Tool report (2002-2003 and 2003-2004 only)

EDconnect

Important steps in processing financial aid information are sending and receiving data over the Student Aid Internet Gateway (SAIG).

The *SAIG Desk Reference for EDconnect* includes EDconnect software instructions. You can download the *SAIG Desk Reference for EDconnect* from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at FSAdownload.ed.gov.

Using This Installation Guide

Use the instructions contained in this Installation Guide to install the software on your computer or local area network (LAN).

This guide also provides you with hardware and software requirements, how to estimate the amount of hard disk space you will need on each computer, LAN compatibility issues, and how to get help.

See "Installation Instructions" in this guide for additional instructions.

Help

Online Help

Instead of a paper user's guide, DL Tools has online Help.

General help is available from the menu bar and field help is available by pressing the F1 key.

See "Use DL Tools Online Help" in this Installation Guide and "Using Help" in the online Help for more information.

CPS/WAN Technical Support

CPS/WAN Technical Support can assist you with any questions regarding:

- Technical assistance
- Software functionality
- EDconnect functionality

Call CPS/WAN Technical Support at:

800/330-5947

TDD/TYY: 800/511-5806

or e-mail CPS/WAN Technical Support at:

cpswan@ncs.com

See the topic “CPS/WAN Technical Support” in the online Help for more information.

Sources of Assistance for Schools

Sources of Assistance for Schools is a document that contains helpful contact information for all Federal Student Aid programs, including frequently called help lines, e-mail addresses, and Web sites. You can download the *Sources of Assistance for Schools* from the FSAdownload Web site located at FSAdownload.ed.gov.

Installation Instructions

Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing DL Tools on a single-user system.

Instructions for network system installations are provided in the “Local Area Network (LAN) Information” section of this guide.

Depending on the type of installation you are performing not all installation files may be required.

Other topics included in this section are:

- Default folder created with installation
- FSAdownload Web site
- Installation Steps at a Glance
- Downloading paper documentation and software from the FSAdownload Web site located at FSAdownload.ed.gov
- Installing the software
- Install log
- Changing the database path for the DL Tools software
- Uninstalling the software

Folder Creation

The installation process automatically creates the following folder for DL Tools files on your local hard drive:

C:\Program Files\EDESuite\DL Tools for Windows

The C: drive is assumed to be the drive letter of your local hard disk, but you can change the drive letter if necessary. Also, you may use a different name for the folder.

Caution: If you change the folder location and name, you must change them for each DL Tools software update you receive and install.

FSAdownload Web Site

You can download the DL Tools software in two formats from the FSAdownload Web site located at FSAdownload.ed.gov. You can download the entire software in one file, called **DLTools30.exe**, or you can download the software in separate installments, which can then be copied to a network drive or diskettes. See “Downloading Software from the FSAdownload Web Site” for more details.

Once the software download is complete, be sure all Windows applications, including screen-savers and e-mail notifiers, are closed. Follow the prompts provided by the software when installing DL Tools.

Warning: Although Windows 2000 is supported, use of Microsoft Access 2000 or higher with any EDE software product is *not* supported. All EDE software is created using Microsoft Access 97 databases. Your database will be irreparably damaged if it is opened in Microsoft Access 2000 or higher and converted to the new database format.

Installation Steps at a Glance

Step	Action	Reference
1	Download all supporting paper documentation from the FSA Web site at FSAdownload.ed.gov .	Read “Downloading Paper Documentation from the FSAdownload Web Site” for instructions.
2	Download the software from the FSA Web site at FSAdownload.ed.gov .	Read “Downloading Software from the FSAdownload Web Site” for instructions.
3	Install the software.	Read “Installing the Software on a Single-User System” for instructions.

Downloading Paper Documentation and Software from the FSAdownload Web Site

You can download both software and paper documents from the Internet using the FSA Web site, FSAdownload.ed.gov. This site was created to help you access financial aid tools (for example, software and paper documents) for easier and more efficient use of DL Tools.

Sample Download Times

The amount of time it takes to download a file depends on the file size and the speed of the Internet connection. If you do not have a direct connection to the Internet, a 56 kbps modem is recommended.

The table below shows the minimum possible download time for various file sizes and modem speeds. The actual times vary depending on the quality of the phone line and Internet traffic.

Modem Speed	1 Megabyte	5 Megabytes	10 Megabytes
9.6 kbps	18 min.	1 hour, 28 min.	2 hours, 58 min.
14.4 kbps	12 min.	59 min.	1 hour, 58 min.
28.8 kbps	6 min.	30 min.	59 min.
33.6 kbps	5 min.	25 min.	51 min.
56 kbps (53 kbps)	3 min.	16 min.	32 min.

Getting Help

Some organizations restrict their users from downloading from FTP sites.

- If you are having trouble downloading (for example, you are prompted for a user ID and password or just cannot download), try again later.
- If you are still unable to download, contact your technical support staff to ensure you have full FTP download rights.

Downloading Paper Documentation from the FSAdownload Web site

For 2003-2004 you can download the paper documentation from the Internet in Adobe PDF format.

The following types of paper documentation are available to download for DL Tools:

- Cover Letters
- Installation Guides

Each document has the date it was posted, file size, and approximate download time. However, the length of time it takes to download a paper document depends on the speed of your Internet connection.

Note: For years prior to 2003-2004, documents may be available in Word format as well as Adobe PDF.

To Download Paper Documentation

1. Go to the URL field located at the top of your browser's screen and type FSAdownload.ed.gov.
2. Click on the **Software** link on the left-hand side of the screen.
3. Click **Direct Loan Tools 2003-2004** to the left of this description. You are taken to the download site.
4. Choose the type of documentation you want to download by clicking the appropriate link.
5. Click on the Adobe PDF to download the file. If you would like to save a copy of the document to your system click **File, Save As** from the browser menu bar. Select a location on your computer, and then click the **Save** button to save the file. If **Save As** is not available, you can also click the diskette button to select a location to save the file to your computer.
6. The Web site is designed to give the file a default name; however, you may choose another name for the file.
7. Once the paper document has been downloaded, go to the saved location and double click on the file to open and print it.

Downloading Software from the FSAdownload Web Site

DL Tools and its related documentation are distributed via the Internet using the FSA Web site, FSAdownload.ed.gov. It is available in two formats. You can download the entire software in one file (DL Tools30.exe) or in separate installments, which can be copied to a network drive or diskettes.

To Download the Software as One File

1. Go to the URL field located at the top of your browser's screen and type FSAdownload.ed.gov.
2. Click the **Software** link on the left-hand side of the screen.
3. Click the **DL Tools 2003-2004** link to the left of this description. You are taken to the download site.
4. Click the **Full Download** link in the software section to download the program as a single file. Either a **Run this program from its current location** or a **Save this program to disk** dialog box appears.
5. Choose your download option. If you choose **Run this program from its current location** the files are downloaded to your computer's temporary folder. If you choose **Save this program to disk** option, select the download location and then click **Save**.

Note: The length of time it takes to download the software depends on the speed of your Internet connection.

6. Once the file is downloaded, go to the saved location and double click **DL Tools30.exe** to extract the file and install the software.

Note: See "Installing the Software on a Single-User System" or "Installing the Software on a Network."

To Download the Software in Separate Installments

1. Go to the URL field located at the top of your browser's screen and type FSAdownload.ed.gov.
2. Click on the **Software** link on the left-hand side of the screen.
3. Click the **DL Tools 2003-2004** link to the left of this description. You are taken to the download site.
4. Click the **Disk 1** link in the software section to download the program as a single file. One of two dialog boxes appear, either **Run this program from its current location** or **Save this program to disk**.
5. Choose your download option. If you choose **Run this program from its current location**, the files are downloaded to your computer's temporary folder. If you choose the **Save this program to disk** option, select the download location and then click **Save**.

Note: The length of time it takes to download the software depends on the speed of your Internet connection.

6. After the download of Disk 1 is finished, click **Disk 2**. Save Disk 2 to the same location as you saved Disk 1.
7. Click each succeeding disk until they have all been saved to the same location on your computer.
8. Once the software disk files are downloaded to your computer, go to that location, double-click **Disk1.exe**, and unpack it to the same folder where the other disks were downloaded. Disk 1 is a self-extracting zip file. Then double-click on **Setup.exe** to install the software.

Note: See "Installing the Software on a Single-User System" or "Installing the Software on a Network."

Installing the Software on a Single-User System

Downloading the software from the FSAdownload Web site located at FSAdownload.ed.gov does not install it. After downloading the software to your computer, you must install it. For installing the software on a LAN, see “Installing the Software on a Network” in this guide.

Installation Options

You can install the software using one of two options:

1. **Full.** Use this option when you are installing DL Tools for Windows **2003-2004** for the first time.

Warning for Subsequent Installations: Use caution when using the Full installation option. The program overwrites, removes, and erases your existing DL Tools database (DLTools.mdb) and all program files (including DLTools.exe), as well as any annotations you may have made to online Help.

Important Installation Note: DL Tools for Windows, version 3.x is an upgrade to version 2.x. If you had installed version 2.x previously, version 3.x must be installed as a Custom Install without the Database, **NOT** a Full Install. If you perform a Full Install of version 3.x and version 2.x exists on your system, you will overwrite your version 2.x database.

2. **Custom.** Use a Custom installation in one of two ways.
 - If you have already installed a full version of DL Tools, you can use this option to add a particular file or files; for example, executable (*.exe) files, database (*.mdb) files, and help (*.hlp) files. This option leaves all other database and system settings intact (unless you select *.mdb files).
 - To upgrade the software, choose Custom installation and select all files except your existing database files (*.mdb). In DL Tools version 3.x Custom is the default selection.

Steps to Install

1. Be sure all Windows applications, including screen-savers and e-mail notifiers, are closed.
2. If you downloaded the DL Tools30.exe file from the FSAdownload Web site, go to the location of that downloaded file.
3. Double-click the file to open and install it. The file decompresses itself into a temporary folder (usually “c:\temp”) and continues the install from there.
4. DL Tools asks you a series of questions during the installation. These questions verify the location of the software on your hard drive. Each question has a default answer.

Note: You must click **Yes** if you get a message asking if you would like to overwrite a read-only file when installing the software.

- If the default answer is correct, click **Next** to go to the next screen.
 - You may change the default answer. If you do, make sure you know the folder where the software is located.
5. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.
 6. When the installation program is finished installing the DL Tools files, it updates your Start menu. It does not, however, create desktop icons or shortcuts or update them if they have already been created. You are prompted to reboot the system to complete the installation.

Installing Subsequent Releases

When you install a release of the software that is an update to a version of the same year, a special process updates the database. The update process occurs the first time the software is initialized after installing the software upgrade. It runs only once, whether on a stand-alone or networked database. If there are no updates to the database, this update will not occur.

Note: See “Installation Options” of this install guide for more information about installing subsequent releases.

Install Log

Each time an installation is performed, an installation log is created. The information tracked is the product and version number, type and nature of the install, drive and folder, date, and time of install. This file is named INSTALL.log and is located in your

C:\Program Files\EDESuite\DL Tools for Windows

folder (or the location you specified during the installation process).

Example:

<APP NAME>	DL Tools for Windows
<VERSION>	3.x
<TYPE>	Stand Alone Full
<SUMMARY>	New release.
<TARGET>	C:\Program Files\EDESuite\DL Tools for Windows
<DATE>	05-02-2002
<TIME>	08:36:54

Changing the DL Tools Database Path

You can change the DL Tools database path from within the DL Tools version 3.x software.

Note to Windows NT Users: To change the DL Tools database path, you must have Windows NT administrator access rights.

To Change the Database Path

1. Open DL Tools and select **Help, System Information**.
2. Click the **Files Information** tab.
3. Click the **Registry** button.
 - A Registry Viewer application is displayed with a split view.
 - In the left window, you see a tree-view style window, and in the right window, you see a list-style window with two fields: **Name** and **Value**.
 - Select DL Tools under Year34.

If you do not see the "Year34" label in the left window:

- Single left click on the + (plus sign) next to EDESuite.
- You will see a label indicating the software's year cycle under EDESuite.

If you do not see the "Direct Loan Tool" label in the left window:

- Single left click on the + (plus sign) next to Year34.
 - You will see a label indicating the software's name.
 - Highlight the name of the software.
4. On the right side of the split screen, find **Database** under the **Name** field, click it and select **Edit, Edit** from the main menu.
 - A **New Registry Value** dialog box is displayed with two edit boxes.
 - One box is labeled with **Name** (which is disabled) and the other box is labeled with **Value**.

5. Enter your new database path in the entry box next to **Value**, including the full path and database name (DLTools.mdb) exactly as it appears in Windows Explorer, with uppercase and lowercase letters.
6. Press **Enter** or click **OK**.
7. A message appears indicating that the registry value is saved. Click **OK**.
8. Exit the **Registry Viewer** by going to **File, Exit**.
9. Click **OK** to exit the System Information dialog box.
10. **Exit** the DL Tools software.

The next time you start DL Tools, you connect to the database using the new database path. You can confirm that you are connected to the new database by viewing the current database name and location in the status bar at the lower right-hand corner of the DL Tools window.

Uninstall

To uninstall DL Tools, click **Start, Programs** from your Windows Desktop and select **EDESuite** to see an icon for the Uninstall utility.

Choosing Uninstall deletes all icons created during the installation of the software from the start menu, the software's program group, all executable files, all DLLs, and the entire database for the version of DL Tools you have installed (except for the INSTALL.log file).

If DL Tools is installed on a LAN, the Uninstall utility deletes all DL Tools files (*.dll) and icons, but not the database file on the network.

Note to Windows NT Users: To uninstall, you must have the same or greater Windows NT access rights as the person who originally installed DL Tools.

To Uninstall DL Tools for Windows 2003-2004

1. Double-click on the **Uninstall** icon. A prompt asks if you are sure that you want to completely remove the application and all of its components.
2. Click the **Yes** button.
3. Click **OK**.

DL Tools may also ask you additional questions during the Uninstall process. Click either **Yes** or **No** in response to these questions.

Warning: Do not uninstall the software if you are performing a Custom installation.

Getting Started

Logging In for the First Time

The first time you start DL Tools, become familiar with the Startup Information box, how to enter a user ID and password, how to create a new password, and how to establish your school as the assumed school used by DL Tools. Instructions for all of these tasks are provided within this section.

User ID and Password

Each time you start DL Tools, you must enter a valid user ID and password.

DL Tools requires a password for each user for system security.

To Access DL Tools for the First Time and Establish Your New Password

1. Type in the default user ID, **SYSADMIN**.
2. Type in the default password, **SYSADMIN**.
3. Type your **new password** in the New Password text entry box. You must change the default password by typing a new one in this field.
 - Up to eight (8) alphanumeric characters may be entered.

4. Type the **new password** again in the Verify Password field.
 - The Password and Verify Password must be the same.
5. Click **OK** to log in.

Note: The SYSADMIN user ID should be reserved for the systems administrator functions. All users should have a unique user ID for logging into the software.

Refer to the topic “Security” within the online Help for information on setting up user IDs and passwords for your staff.

Resetting Your User ID and Password

If you have forgotten your password, you can have your DL Tools administrator give you a new one using the User Security function.

To Access the User Security Function

1. Select **Tools** on the menu bar.
2. Select **Setup, Global, Security Users**.

If you are the DL Tools for Windows administrator and you have forgotten your password, call CPS/WAN Technical Support for help with resetting the default user ID and password to SYSADMIN.

All DL Tools users, especially DL Tools administrators, should record their user IDs and passwords and keep them in a safe place.

System Requirements

Hardware and Software Requirements

The following hardware and software components are required for DL Tools:

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better
- 128 MB total memory or more
- 20 GB hard drive
- 56 K analog modem K flex or X2 technology
- Dedicated phone line
- 3.5"/1.44 MB high-density floppy disk drive, including 3.5" high-density double-sided diskettes
- 24x CD-ROM drive with sound board
- Windows 95 keyboard (for example, IBM enhanced 101 or 102 keyboard)
- Microsoft compatible mouse
- Laser printer capable of printing on standard paper (8 1/2" x 11")
- 32-bit operating system (Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x, Microsoft ME, or Microsoft Windows XP)

Note: Windows 2000 users must have at least power user permissions

- Super Video Graphics Adapter (SVGA) monitor and video card capable of 800 x 600 resolution (small fonts only) or higher

Note: The DL Tools software was designed to be viewed in 800 x 600 resolution. You may use a resolution higher than this at your own discretion.

- Internet Service Provider (ISP) or connection to the Internet that supports 56K modem connection or higher

Note: A connection to the Internet is necessary to access the Information for Financial Aid Professionals Web site located at ifap.ed.gov, and the FSAdownload Web site located at FSAdownload.ed.gov.

- Microsoft Internet Explorer version 4.01, Service Pack 2 or higher, or Netscape Navigator version 4.73 or higher

LAN Hardware and Software Recommendations

The following hardware and software components are recommended for running DL Tools in a LAN environment:

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better
- 128 MB total memory or more on each workstation
- 20 GB hard drive available hard disk space on the file server and 600 MB available on the network drive. (This depends on the number of records you will store in your database.)
- Desktop Operating System: Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x, Microsoft ME, or Microsoft Windows XP

Note: Windows 2000 users must have at least power user permissions.

- Network Operating System: Novell NetWare versions 3.12 or above or 4.11 or above, Windows 2000 Server, Windows 2000 Advanced Server or Microsoft Windows NT 4.0

Note: Novell NetWare versions 3.12 and 4.11 are separate products.

- 16 megabit/sec transfer rate on the network for token ring, 10 megabit/sec transfer rate on the network for Ethernet, or the maximum transfer rate your network topology supports
- Super Video Graphics Adapter (SVGA) monitor and video card capable of 800 x 600 resolution (small fonts only) or higher

Note: The DL Tools software was designed to be viewed in 800 x 600 resolution. You may use a resolution higher than this at your own discretion.

Refer to “Systems Requirements” for a complete listing of the general hardware and software required for DL Tools.

Optional Items to Consider

The following items are recommended as additional tools to assist you in managing your financial aid data:

- Backup system (for example, a tape backup system) to store your data
- Power supply backup or surge protectors
- Phone line surge protector
- Virus scan software

Estimating Hard Disk Space

The following information gives you an estimate of how much hard disk space is required for each ED software product and for certain types of records.

To find out the approximate total space required, add together the amounts shown for each ED software product and the types of records you are using. You should also take into account other software products installed on your PC. For example, the total space required for 5,000 Direct Loan, ISIR, NSLDS, and Packaging records using all of the software products listed is approximately 75 MB.

Each software product requires the following space:

Product	Size
DL Tools for Windows	5 MB
EDconnect for Windows	15 MB
EDExpress for Windows	16 MB
ISIR Analysis Tool for Windows with 300 records	4 MB
Return of Title IV Funds for Windows	2 MB
SSCR-32 with 300 records	6 MB

Each set of 5,000 records requires the following space:

Record	Size
Direct Loan	6 MB
ISIR	15 MB
NSLDS	4 MB
Packaging	2 MB

Local Area Network (LAN) Information

Installing the Software on a Network

Follow the instructions in this section for installing the software on a network. For example,

- If you are installing the initial DL Tools, do a full installation and follow the steps provided in “First Time Network Installation.”
- If you are installing DL Tools after you have created data in the database, follow the instructions provided in “Subsequent Network Installation.”

When you perform a workstation installation, the executable file for DL Tools (**DLTools.exe**) and all other program files are installed to a workstation’s local hard drive.

The installation modifies all DL Tools program group icons in your Windows Start Menu folder to point to the executable file on your local hard drive.

Installing this file to the workstation’s hard drive rather than the network file server improves the speed and performance of the software because DL Tools uses the combined resources of the workstation and the file server instead of those of the file server alone.

Follow the instructions on the next page to install DL Tools to a LAN.

Note: The DL Tools software may be installed in “safe mode” but cannot be run in safe mode.

Note: Be sure that all Windows applications, including screen-savers and e-mail notifiers, are closed before you proceed with this setup.

First Time Network Installation

To Install the Software on a Network for the First Time

1. First, use the Network Server installation option to install only the DL Tools database (**DLTools.mdb**) on the file server, not the DL Tools program files.
2. Enter the network server location where you want to install DL Tools for Windows, version 3.x database files.

Type the path or click the **Browse** button.

3. Follow the prompts provided by the **Setup** program.
4. Perform **Network Workstation** installations on *all* workstations that will access the server-based copy of the database for this version of the software.

Choose the Network Workstation installation option, and then select **Full**.

Note: The Full option installs all program files, including the executable file (DLTools.exe) in a local hard drive folder.

The Workstation installation option prompts you for the location of the database installed during the Network Server installation (step 2).

Additional Instructions

You are asked two location questions during a Network Workstation installation:

- The software first prompts you to enter the location of the database on the server. This question is asking only where your database is located, not where you want the software installed.
- After the software has located the database, the software asks you where you want to install the program files. Your response should be the default location, **C:\Program Files\EDSuite\DL Tools for Windows** or another local designation.

Subsequent Network Installation

To Install the Software on a Network Where the Software Is Already Installed

1. **Do not** use the Network Server installation option for a subsequent network installation of the software. The Network Server installation option is only for users installing DL Tools to a network file server for the first time. Choosing this installation option installs an empty DL Tools database file (DLTools.mdb) on the network file server, overwriting any existing database.

If you do select the Network Server installation option for a subsequent network installation of the software, the installation program alerts you that DL Tools for Windows 2003-2004 has already been installed in the specified directory and asks if you want to overwrite the existing version. Select **No**.

Important Installation Note: DL Tools for Windows, version 3.x is an upgrade to version 2.x. If you had installed version 2.x previously, version 3.x must be installed as a Custom Install without the Database, **NOT** a Full Install. If you perform a Full Install of version 3.x and version 2.x exists on your system, you will overwrite your version 2.x database.

2. Click on the **Network Workstation** installation option.
3. You are then prompted for the location of your Direct Loan Tool database file (DLTools.mdb) during the DL Tools Network Workstation installation.
4. If this is a subsequent release of the software, the database is updated only once, after all workstation installations are complete. This action occurs when the software is accessed for the first time after the upgrade. When the first user logs into DL Tools, the update runs. Subsequent installations will not update the database again.

Note: All workstations should be upgraded with the latest release before you open the software to obtain the database update message. If you fail to do this any workstation not updated receives a database mismatch error message if a user tries to run DL Tools.

5. Follow the prompts provided by the Setup program.

Note: If you are adding a workstation to your work environment, perform a **Full** network workstation installation of the current version of DL Tools for that workstation.

To Install Subsequent and Future Releases

For this version and all other future releases of DL Tools, you must do a **Custom** workstation install to ensure the database structure is updated but not overwritten. Make sure the Database option is **not** selected on the Select Components screen during the Custom workstation installation.

Follow the instructions for “Subsequent Network Installation.”

Instructions for Schools with Diskette Directories on a Server

To Install the Software Using Diskettes

If you want to copy the installation diskettes to a file server so you can do workstation installations from the server, use the following steps:

1. Create a disk folder for each diskette folder downloaded. For example, if you download four diskettes, then create four directories on the file server; if you download six diskettes, then create six directories on the file server; if you download nine diskettes, then create nine directories on the file server, etc.

In the following six diskette example, you would create a folder structure like this one on your server. Example:

\Install

\Install\DISK1

\Install\DISK2

\Install\DISK3

\Install\DISK4

\Install\DISK5

\Install\DISK6

Note: The parent folder can have any name, but the subdirectories must be named DISK1, DISK2, etc.

2. Copy the contents of each disk into its corresponding folder on the server.
3. You can now install DL Tools from the file server by running **SETUP.exe** from the DISK1 folder on the server instead of carrying the diskettes to each workstation.

LAN Server Compatibility

DL Tools can be used as single-user or multi-user software. It can be run on the following network operating systems:

- Novell NetWare 3.x, 4.x, and 5.x
- Microsoft Windows NT Server 4.x
- Windows 2000 Server
- Windows 2000 Advanced Server

Caution: You should not run the software on peer-to-peer networks such as Artisoft LANtastic, Microsoft Windows for Workgroups, or Novell's Personal NetWare.

According to the Microsoft Knowledge Base, some anomalies have been known to occur when using Microsoft Access with the following networks:

- DEC Pathworks
- IBM LAN Server
- Sun PC-NFS

Since DL Tools makes extensive use of Microsoft Access as a database engine, do not use these network operating systems with DL Tools.

Warning: Although Windows 2000 is supported, use of Microsoft Access 2000 or higher with any EDE software product is *not* supported. All EDE software is created using Microsoft Access 97 databases. Your database will be irreparably damaged if it is opened in Microsoft Access 2000 or higher and converted to the new database format.

LAN Cautions

When multiple users are concurrently updating records in the DL Tools database, those records are locked. Also, certain functions are locked when concurrent access would degrade the system or disrupt a process.

Examples include:

- The database is locked when the executing function is mass loading records, such as the Import function.
- Records are locked when an executing function needs stable data for updating or printing.

LAN Messages

Novell

These messages notify users when a locking situation occurs:

LAN Error Message

Condition

<Database> is locked and cannot be accessed at this time.

If the database remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point prior to execution.

Record in use - Retry later.

If the record remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point prior to execution.

Function in use - Retry later.

If the function remains locked after five seconds of continual attempts, you are returned to the menu bar.

NT

Your NT server should be optimized to maximize throughput for file sharing. To do this, log on to the NT server console, then:

1. At the server control panel, go to **Start, Settings, Control Panel, Network**.
2. On Network screen, choose the **Services** tab.
3. Select **Server** from the list by double-clicking on it.
4. Mark the **Maximize Throughput for File Sharing** button.

Note: Should you encounter problems performing this network installation, contact your school's network administrator for assistance.

Both the location and the size of the paging files on the NT server are important to the functionality of the software. The size of the paging files on the server should generally be higher than what Microsoft recommends. If at all possible, move the paging files from the drive where the DL Tools software is located, even if it means putting them on the system drive.

If your NT server partition, where the database is located, is an NT File System (NTFS), remember that the folder path is case-sensitive.

The financial aid group must own the folder, as well as all files in the database folder, on your NT server.

All users must have Change (delete, create, execute, read, and write) or higher permission to access both the DL Tools database and downloaded folder, as well as the files in each of those folders.

Additional LAN Instructions

If you are using a NetWare product, please enter the following commands from the NetWare Server Console prompt:

Set Maximum Record Locks Per Connection = 10000

This line should also be added to the AUTOEXEC.ncf file on the NetWare server.

Getting Help

Basics

There are a number of ways to get help with the installation of DL Tools:

- Review installation instructions.
- Become familiar with your PC.
- Contact your system administrator.
- Use DL Tools online Help.
- Contact Technical Support.

These approaches are described in the succeeding sections.

Review Installation Instructions

If you have problems installing DL Tools, first review the installation instructions again.

Try repeating the installation process (make sure you include *all* steps).

If you are still having difficulty, contact CPS/WAN Technical Support.

Become Familiar with Your PC

Once you have successfully completed the DL Tools installation, click **System Information** from the Help menu.

Compare this information to the required configuration listed at the beginning of this section. You may need to upgrade your equipment or your system's configuration.

Contact Your System Administrator

Your school or organization may have additional instructions for your PC. For example, you may get an error if you are trying to install the software to a drive for which you do not have access.

Use DL Tools Online Help

Instead of a paper user's guide, DL Tools has online Help.

General help is available from the menu bar and field help is available by pressing the **F1** key.

See the topic "Using Help" in the online Help for more information.

You can access online Help by any of the following methods:

- From the **Help** menu, choose a help command.
- Choose the **Help** button available in most dialog boxes.
- Use the keyboard to select an item on a menu, and then press **F1** to see a description of the item.
- Select a dialog box option or command and then press **F1**, or click the **Help** button to move directly to an explanation of the option.
- Use the **Context Help** toolbar button to obtain help on menu options and other toolbars.

The Getting Started help file for 2003-2004 contains general information relevant to financial aid processing, but is not directly related to DL Tools functions. It is available with the first release of EDEExpress and can be accessed from outside the software. The installation program creates an option for it on the EDESuite menu. You can access this help from the **Start** button by selecting **Programs, EDESuite, Getting Started**.

Technical Support

Contact FSA Technical Support

FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's FSA systems, software, and mainframe products. For more information about FSATECH, including how to subscribe, visit the FSA Schools Portal, Listservs & Mailing Lists:

www.ed.gov/offices/FSA/services/fsatechsubscribe.html

For FSA technical support, post an e-mail (including your TG number and all pertinent contact information) with your question. You will receive a response from FSA staff or the financial aid partner responsible for the system which you have a question about.

Note: You must subscribe to FSATECH in order to send and receive messages from the list.

CPS/WAN Technical Support

If you need technical support, call CPS/WAN Technical Support:

800/330-5947

Representatives are available to assist you between 7 a.m. and 7 p.m. (CT), Monday through Friday, excluding holidays.

You may also send your inquiries via the Internet to CPS/WAN:

cpswan@ncs.com

Guidelines for Calling Technical Support

When you call CPS/WAN Technical Support, you must be at your PC and prepared to provide the following information:

- Your TG ID (TG followed by a 5-digit number starting with 5, 6, 7, or 8).
- The version of the software you are using (under Help/About Direct Loan Tools for Windows).
- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, and type of memory management being used).

- The exact wording of any error messages you received, as they appeared on your screen.
- A detailed description of the utility or function you were running when the error occurred, and the steps you took to get to that utility or function.
- A description of any resolution steps you took prior to calling.

CPS/WAN Voice Response System

The CPS/WAN Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to **enter 1** for an English-speaking operator or **enter 2** for a Spanish-speaking operator.