

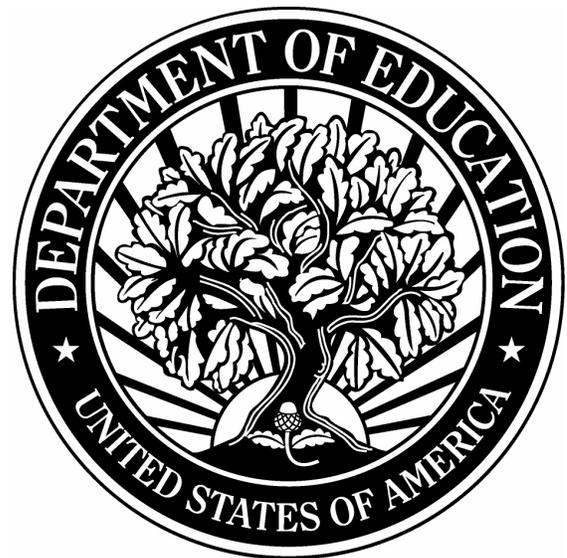
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Installation Guide for

# **ISIR Analysis Tool for Windows**

**2003-2004**

**U.S. Department of Education**



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

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# Introduction

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## Preface

The ISIR Analysis Tool for Windows was renamed from Quality Analysis Tool for Windows yet the software function changes are minimal. The ISIR Analysis Tool for Windows 2003-2004 (IA Tool) software focuses on *initial* and *paid on* ISIR data. These two transactions are presented side by side for you to see and compare the fields that were corrected. Using Estimated Family Contribution (EFC) ranges and increments of change, you can analyze a specific student population to determine which fields were corrected most often and how those changes affected the students' EFCs.

- The software will allow for Prior Year User-Defined Queries and Setup to be moved forward from QA Tool based on the same parameters that are currently used in the EDEExpress product for Prior Year Imports.
- The software will allow for Prior Year User Data Setup to be moved forward from QA Tool based on the same parameters that are currently used in the EDEExpress product for Prior Year Imports.
- The software will provide summary data on the List - Verification Selection Criteria by Student and List - Verification Selection Criteria by Code reports that will provide detail on the number of codes applied to the population, the number of students affected, and the corresponding percentages for both.

- The following changes will be implemented in regard to the Verification Tracking Flag:
  - On the List-Verification Selection Flags by Student report, if a Verification Tracking Flag value exists for a student, the “Verification Tracking Flag” value will be printed after the “Y.”
  - A summary section will be added to this report to give totals of the various priority flags; for example, Total Number of Priority 1, Total Number of Priority 2.
  - A filter will be added to the print dialog box to turn off the detail of this report and just produce summary numbers.
  - A predefined query will be added for Verification Tracking Flag.
- The software will utilize the Set to Blank option in the Global Multiple Entry specs to allow schools to set to blank the Initial School Verification Flag field.

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

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# ISIR Analysis Tool Features

The features of ISIR Analysis Tool are:

- Custom Reports
- Export
- File Management
- Import
- Print
- Query
- User Database

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## 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.

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## Help

### Online Help

Instead of a paper user’s guide, ISIR Analysis Tool has online Help.

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

See “Use ISIR Analysis Tool Online Help” in this Installation Guide and the “Using Help” topic 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
- ISIR/custom file layouts
- 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](mailto: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](http://FSAdownload.ed.gov)**.

# Installation Instructions

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## Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing ISIR Analysis Tool 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
- Downloading paper documentation and software from the FSAdownload Web site located at [FSAdownload.ed.gov](http://FSAdownload.ed.gov)
- Installing the software
- Installation log
- Changing the database path for the ISIR Analysis Tool software
- Uninstalling the software

## Folder Creation

The installation process automatically creates the following folder for ISIR Analysis Tool files on your local hard drive:

**C:\Program Files\EDESuite\ISIR Analysis Tool 2003-2004**

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 ISIR Analysis Tool software update you receive and install.

## FSAdownload Web Site

You can download the ISIR Analysis Tool software in two formats from the FSAdownload Web site located at [FSAdownload.ed.gov](http://FSAdownload.ed.gov). You can download the entire software in one file, called **IATool10.exe**, or you can download the software in separate installments, which can then be copied to a network drive or diskettes. See the “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, have been closed. Follow the prompts provided by the software when installing ISIR Analysis Tool.

**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 <a href="http://FSAdownload.ed.gov">FSAdownload.ed.gov</a> .	Read “Downloading Paper Documentation from the FSAdownload Web Site” for instructions.
2	Download the software from the FSA Web site at <a href="http://FSAdownload.ed.gov">FSAdownload.ed.gov</a> .	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.

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## 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](http://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 ISIR Analysis Tool.

### 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 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.

<b>Modem Speed</b>	<b>1 Megabyte</b>	<b>5 Megabytes</b>	<b>10 Megabytes</b>
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 can't 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 ISIR Analysis Tool:

- Cover Letters
- Installation Guides
- Desk References
- Technical References

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](http://FSAdownload.ed.gov).
2. Click on the **Software** link on the left-hand side of the screen.
3. Click **ISIR Analysis Tool 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

ISIR Analysis Tool and its related documentation are distributed via the Internet using the FSA Web site, [FSAdownload.ed.gov](http://FSAdownload.ed.gov). It is available in two formats. You can download the entire software in one file (IATool10.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](http://FSAdownload.ed.gov).
2. Click the **Software** link on the left-hand side of the screen.
3. Click the **ISIR Analysis Tool 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 **IATool10.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](http://FSAdownload.ed.gov).
2. Click on the **Software** link on the left-hand side of the screen.
3. Click the **ISIR Analysis Tool 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 computers temporary folder. If you choose the **Save this program to disk** option, you will need to 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.”

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# Installing the Software on a Single-User System

Downloading the software from the FSAdownload Web site located at [FSAdownload.ed.gov](http://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 the “Installing the Software on a Network” section in this guide.

## Installation Options

You can install the software using one of two options:

1. **Full.** Use this option when you are installing ISIR Analysis Tool for Windows **2003-2004** for the first time and want to install all available ISIR Analysis Tool software functions.

**Warning for Subsequent Installations:** Use caution when using the Full installation option. The program overwrites, removes, and erases your existing ISIR Analysis Tool database (IAT34.mdb) and all program files (including IAT32\_34.exe), as well as any annotations you may have made to online Help.

2. **Custom.** Use a Custom installation in one of two ways.
  - If you have already installed a full version of ISIR Analysis Tool, 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 ISIR Analysis Tool version 1.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 IATool10.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 installation from there.
4. ISIR Analysis Tool 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 ISIR Analysis Tool 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.

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## Installation 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\ISIR Analysis Tool 2003-2004**

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

**Example:**

<b>&lt;APP NAME&gt;</b>	<b>ISIR Analysis Tool for Windows 2003-2004</b>
<b>&lt;VERSION&gt;</b>	<b>1.x</b>
<b>&lt;TYPE&gt;</b>	<b>Stand Alone Full</b>
<b>&lt;SUMMARY&gt;</b>	<b>New release.</b>
<b>&lt;TARGET&gt;</b>	<b>C:\Program Files\EDESuite\ISIR Analysis Tool 2003-2004</b>
<b>&lt;DATE&gt;</b>	<b>06-02-2002</b>
<b>&lt;TIME&gt;</b>	<b>08:36:54</b>

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# Changing the ISIR Analysis Tool Database Path

You can change the ISIR Analysis Tool database path from within the ISIR Analysis Tool version 1.x software.

**Note to Windows NT Users:** To change the ISIR Analysis Tool database path, you must have Windows NT administrator access rights.

## To Change the Database Path

1. Open ISIR Analysis Tool 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 ISIR Analysis Tool 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 "ISIR ANALYSIS 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 (IAT34.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 ISIR Analysis Tool software.

The next time you start ISIR Analysis Tool, 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 ISIR Analysis Tool window.

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# Uninstall

To uninstall ISIR Analysis Tool, 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 ISIR Analysis Tool you have installed (except for the INSTALL.log file).

If ISIR Analysis Tool is installed on a LAN, the Uninstall utility deletes all ISIR Analysis Tool 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 ISIR Analysis Tool.

## To Uninstall ISIR Analysis Tool 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**.

ISIR Analysis Tool 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

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## Logging In for the First Time

The first time you start ISIR Analysis Tool, 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 ISIR Analysis Tool. Instructions for all of these tasks are provided within this section.

### Startup Information Box

The first time you launch ISIR Analysis Tool, you see the **Startup Information** box. This box displays various messages, warnings, or errors.

The first time you log in to ISIR Analysis Tool, one of these messages alerts you to establish your Assumed School Code.

See “Setting your Assumed School Code” for step-by-step instructions.

### *To View and Close the Startup Information Box*

1. The first time you access ISIR Analysis Tool, the **Startup Information** box is displayed.
2. Review the messages, warnings, or errors displayed.
3. Click **Close** or press **Enter** to close the **Startup Information** box.

## User ID and Password

Each time you start ISIR Analysis Tool, you must enter a valid user ID and password.

ISIR Analysis Tool requires a password for each user for system security.

### ***To Access ISIR Analysis Tool 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 administer functions. All users should have a unique user ID for logging into the software.

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

After you enter your new password, set up your Assumed School Code. See “Setting Your Assumed School Code” for step-by-step instructions.

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## Resetting Your User ID and Password

If you have forgotten your password, you can have your ISIR Analysis Tool administrator give you a new one using the Security Users function.

### To Access the User Security Function

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

If you are the ISIR Analysis Tool 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 ISIR Analysis Tool users, especially ISIR Analysis Tool administrators, should record their user IDs and passwords and keep them in a safe place.

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# Steps in the ISIR Analysis Tool Process

## Step 1: Setting Up the Software

You must use the **System** option under **Tools, Setup** to define general system information before you can import and analyze data. You may also want to create some custom formats to help you extract the specific data you need.

Security functions are also available under Setup. These options allow the ISIR Analysis Tool administrator to create user IDs and select the functions that each user ID can access.

### ***System Setup***

From the main menu bar select:

- **Tools, Setup, System**
- **Tools, Setup, Verification Edit Profile**
- **Tools, Setup, File Management**
- **Tools, Setup, User Database**

### ***Custom Formats Setup***

From the main menu bar select:

- **Tools, Custom Formats, Custom Reports**
- **Tools, Custom Formats, Selected Fields**
- **Tools, Custom Formats, Field Increments**
- **Tools, Custom Formats, EFC Ranges**

### ***Security Setup***

From the main menu bar select:

**Tools, Setup, Security Users**

## **Step 2: Importing Data**

When you have defined your system settings, the next step is to import your data.

### ***Import Data***

From the main menu bar select:

- **File, Import**

## **Step 3: Validating Data**

Data Validation is a process that deletes unmatched records from the database. When you have imported your data, you must validate it before you can analyze it.

### ***Validate Data***

From the main menu bar select:

- **Process, Data Validation**

## **Step 4: Selecting for Verification**

In this step, you use verification edit profiles you design to find student records that meet your school's verification criteria and to flag those records for verification.

This step is not required, but it can help you more accurately:

- **Identify verification errors that occur at your school**
- **Identify and use verification practices that make a difference in aid awards**
- **Identify and eliminate time-consuming verification practices that make little or no difference in final awards**

## **Step 5: Analyzing Data**

ISIR Analysis Tool allows you to compare the Initial and Paid On transactions side by side on the Transaction Comparison tab. For each ISIR, you must set the Initial School Verification flag to indicate that the Initial ISIR matched the criteria for your school's verification process.

You can also view data in user-defined fields on the User Database tab. In the Print function, you will find reports that compile the data in a variety of ways, as well as Custom Reports that include only the data you specify.

### ***Analyze Data***

From an open record click:

- **Transaction Comparison tab**

**Note:** You can choose to see all fields, or you can choose a specific group of fields using **Selected Fields Codes** that you define in **Setup, Custom Formats, Selected Fields**.

### ***Print Reports***

From the main menu bar select:

- **File, Print**

# System Requirements

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## Hardware and Software Requirements

The following hardware and software components are required for ISIR Analysis Tool:

- 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 ISIR Analysis Tool 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](http://ifap.ed.gov), and the FSAdownload Web site located at [FSAdownload.ed.gov](http://FSAdownload.ed.gov).

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

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## LAN Hardware and Software Recommendations

The following hardware and software components are recommended for running ISIR Analysis Tool 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 ISIR Analysis Tool 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 ISIR Analysis Tool.

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## **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

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## 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:

<b>Product</b>	<b>Size</b>
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:

<b>Record</b>	<b>Size</b>
Direct Loan	6 MB
ISIR	15 MB
NSLDS	4 MB
Packaging	2 MB

# Local Area Network (LAN) Information

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## 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 ISIR Analysis Tool, do a full installation and follow the steps provided in “First Time Network Installation.”
- If you are installing ISIR Analysis Tool 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 ISIR Analysis Tool (**IAT32\_34.exe**) and all other program files are installed to a workstation’s local hard drive.

The installation modifies all ISIR Analysis Tool program group icons in your Windows Start Menu folders 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 ISIR Analysis Tool 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 ISIR Analysis Tool to a LAN.

**Note:** The ISIR Analysis Tool 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 ISIR Analysis Tool database (**IAT34.mdb**) on the file server, not the ISIR Analysis Tool program files.
2. Enter the network server location where you want to install ISIR Analysis Tool for Windows, version 1.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 (IAT32\_34.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\ISIR Analysis Tool 2003-2004** 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 ISIR Analysis Tool to a network file server for the first time. Choosing this installation option installs an empty ISIR Analysis Tool database file (IAT34.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 ISIR Analysis Tool for Windows 2003-2004 has already been installed in the specified directory and asks if you want to overwrite the existing version. Select **No**.

2. Click on the **Network Workstation** installation option.
3. You are then prompted for the location of your ISIR Analysis Tool database file (IAT34.mdb) during the ISIR Analysis Tool 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 ISIR Analysis Tool, 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 ISIR Analysis Tool.

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 ISIR Analysis Tool for that workstation.

## ***To Install Subsequent and Future Releases***

For this version and all other future releases of ISIR Analysis Tool, 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 install.

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 ISIR Analysis Tool from the file server by running **SETUP.exe** from the DISK1 folder on the server instead of carrying the diskettes to each workstation.

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## LAN Server Compatibility

ISIR Analysis Tool 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 ISIR Analysis Tool makes extensive use of Microsoft Access as a database engine, do not use these network operating systems with ISIR Analysis Tool.

**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 ISIR Analysis Tool 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.

- Functions are locked when multiple executions of the functions would destroy the databases.

These functions include:

- User Database (creating or deleting)
- Repair Database
- Compact Database
- Database Verification

While you are using the Utility functions listed above, as well as when you are creating or deleting the User Database, no one else should access ISIR Analysis Tool.

## **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 ISIR Analysis Tool 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 ISIR Analysis Tool 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

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## Basics

There are a number of ways to get help with the installation of ISIR Analysis Tool:

- Review installation instructions.
- Become familiar with your PC.
- Contact your system administrator.
- Contact Technical Support.

These approaches are described in the succeeding sections.

## Review Installation Instructions

If you have problems installing ISIR Analysis Tool, 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 ISIR Analysis Tool 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 ISIR Analysis Tool Online Help

Instead of a paper user's guide, ISIR Analysis Tool 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 ISIR Analysis Tool functions. It is available with the first release of EDEExpress and can be accessed from outside EDEExpress. 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](http://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](mailto: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 ISIR Analysis Tool 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.