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Installation Guide for

# EDconnect

U.S. Department of Education



**FSA**  
FEDERAL  
STUDENT AID

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# Student Aid Internet Gateway (SAIG) Overview

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## Foreword

Welcome to the U.S. Department of Education's (ED's) Student Aid Internet Gateway (SAIG).

Through the SAIG, you can send, receive, and manage Federal student aid information electronically. By linking your computer to the resources of various Title IV Application System databases and processing services, the SAIG helps you manage Title IV Federal Student Aid (FSA) information efficiently.

Using software provided for the SAIG, you collect data on your personal computer (PC) or computer system and transmit the collected data in batches over the SAIG. The appropriate Title IV Application System receives the data, processes the data, performs any required database cross-referencing, and returns the processed data to your mailbox. The entire processing cycle for routine application data within the SAIG system is typically three working days.

In addition to providing a summary of the services available through the SAIG, this guide gives detailed instructions on the installation of EDconnect. Help with the operation of EDconnect is contained within the software. To see a list of available topics, select Help Topics from EDconnect's Help menu. Both the installation guide and EDconnect's On-line Help are designed to address the needs of non-technical users, although a working knowledge of Windows and the ability to perform basic PC operations are assumed.

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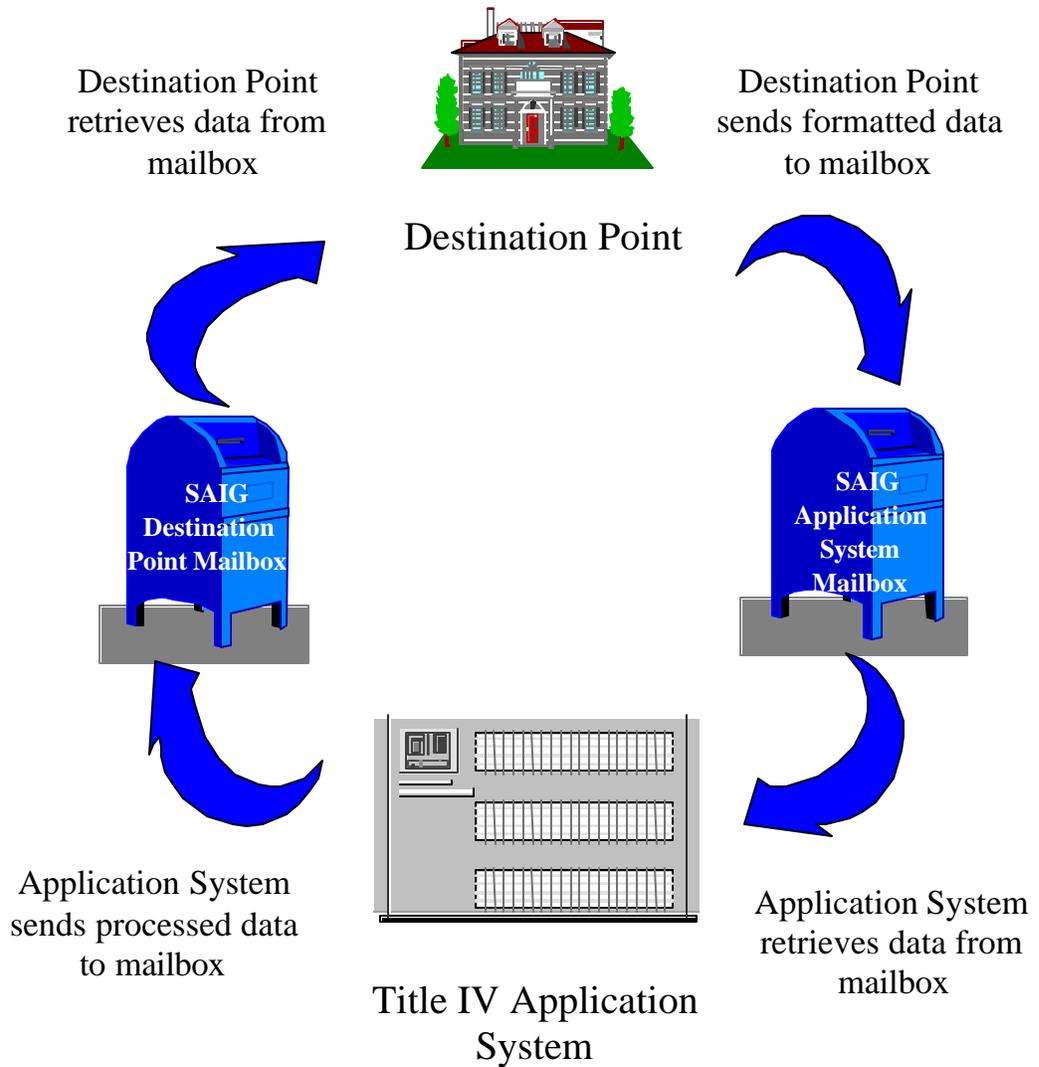
## **SAIG Services**

Participants in the SAIG can take advantage of a wide range of electronic processing and transmission capabilities. SAIG participants can exchange data with the Title IV Application Systems and, through the Internet, access the Central Processing System (CPS), National Student Loan Data System (NSLDS), and the Federal Pell Grant/Recipient Financial Management System (RFMS) databases. The SAIG is ED's information highway, linking members of the financial aid community with ED and the Title IV Application Systems.

By enrolling in the SAIG, you have become a “destination point.” ED provides the EDconnect software to make it possible for you to send and receive data through the SAIG. In addition, ED makes other programs and documentation available for additional Title IV Application Systems in which you may have enrolled.

## Store-and-Forward Data Transmissions

As a destination point, you have been assigned a Student Aid Internet Gateway electronic mailbox. Using EDconnect or the appropriate mainframe software, you can retrieve information, sent to you by the Title IV Application Systems, from your mailbox. Using the same software, you can send information to the mailboxes of the Title IV Application Systems. EDconnect, or your mainframe software, will send data to the correct mailbox according to the type of data you are sending. The figure below illustrates the flow of data between a destination point and a Title IV Application System using electronic SAIG mailboxes:



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## Title IV Application System Databases

Through the SAIG, you can exchange information with the Central Processing System (CPS), the Federal Pell Grant/Recipient Financial Management System (RFMS), the William D. Ford Federal Direct Loan Program (Direct Loan), and the National Student Loan Data System (NSLDS). You can also participate in Campus Based Program reporting, such as the Fiscal Operations Report and Application to Participate (FISAP).

### Central Processing System (CPS)

Since 1985, the CPS has sponsored a program called Electronic Data Exchange (EDE). EDE serves any school offering programs beyond the high school level, including colleges, universities, and trade schools.

#### *Functions*

Using EDE in conjunction with the SAIG enables institutions to:

- Submit initial Federal student application data electronically and receive the results electronically as an Institutional Student Information Record (ISIR).
- Receive ISIRs electronically for students who submit a Federal application and indicate the institution as one of their six choices on the Free Application for Federal Student Aid (FAFSA).
- Electronically submit corrections to Federal application data and receive the results as ISIRs.
- Electronically submit requests for duplicate ISIRs.

#### *State Agencies*

EDE also provides data to state agencies. State agencies can receive ISIRs containing all reported applicant data by using EDE in conjunction with the SAIG. A state agency is able to:

- Receive ISIRs for students who submit FAFSAs and indicate that state as their state of legal residence.
- Receive ISIRs for students who submit FAFSAs and indicate a school within the state.
- Request an ISIR for any student on the CPS database after receiving a written release from the student.

## ***EDExpress***

EDE participants may use EDExpress, a PC software package that allows you to enter, report, and manage financial aid–related data. EDE users may also develop their own EDE software. The EDE Technical Reference provides technical specifications needed to do so.

## **Federal Pell Grant/Recipient Financial Management System (RFMS)**

The Federal Pell Grant/Recipient Financial Management System (RFMS) is a computerized financial management and document processing system for Federal Pell Grants.

### ***Functions***

Using EDExpress and EDconnect, you can:

- Enter Federal Pell Grant payment records.
- Generate batches of data for submission to the Federal Pell Grant program.
- Receive the processed results.
- Print Electronic Statements of Accounts (ESOs).
- Transmit and receive Federal Pell Grant payment data electronically.

In the Pell module of EDExpress, you can create, batch, and export Pell records, and then import the processed results. You may use the Pell module by itself or in conjunction with other EDExpress modules. You can print ESOAs using EDExpress by selecting ESOA as your print option. Payment data are transmitted and received using EDconnect.

## **William D. Ford Federal Direct Loan Program (Direct Loan)**

The William D. Ford Federal Direct Loan Program is commonly referred to as the Direct Loan program. Authorized by the Student Loan Reform Act of 1993, it provides direct financing and direct delivery of loan funds to eligible borrowers to cover the costs of postsecondary education. The Federal government provides the loan capital for these loans.

## ***Loan Types***

Direct Loan programs include:

- Federal Direct Stafford Loan Program.
- Federal Direct Unsubsidized Stafford Loan Program.
- Federal Direct PLUS Loan Program.
- Federal Direct Consolidation Loan Program.

## ***Functions***

Participating schools use the SAIG to communicate electronically with ED's Direct Loan Servicing Center. Institutions can use EDEExpress to:

- Originate Direct Loan records.
- Print promissory notes.
- Export loan data to the Direct Loan Servicing Center and import acknowledgments.
- Calculate gross fund needs.
- Reconcile with the Direct Loan Servicing Center.
- Certify a borrower's enrollment.

Direct Loan participating schools have the option to use EDEExpress, to develop their own system, or to employ a combination of both.

## **National Student Loan Data System (NSLDS)**

The National Student Loan Data System (NSLDS) is a national database of loan-level information and selected grant data for aid disbursed under Title IV of the Higher Education Act of 1965. Schools, guarantee agencies, and other ED Title IV Application Systems provide data to NSLDS.

Schools participating in the Perkins Loan program must provide loan-level and Supplemental Educational Opportunity Grant (SEOG) overpayment information to the NSLDS. Some data sent to and received from the NSLDS are transmitted via the SAIG. The NSLDS provides a software package called DataPrep to assist institutions in preparing data for transmittal.

All schools, whether or not they participate in the Perkins Loan Program, are eligible to access information stored at the NSLDS about their students. If you want access to NSLDS data, check the appropriate box in the NSLDS section of your SAIG enrollment form. After your enrollment is processed, you will receive additional information from NSLDS.

## **Campus-Based Programs**

The FISAP consists of an annual report of financial and enrollment activity for the previous year, and an application to receive funds from one or more Title IV Campus Based programs. Campus Based schools use the FISAP for Windows software to enter, report, and manage FISAP data through each stage of the process. The FISAP software and an installation guide are available online at **[FSAdownload.ed.gov](http://FSAdownload.ed.gov)**.

ED requires all schools to send FISAP information electronically. FISAP files are sent to the FISAP Application System contractor for processing via the SAIG.

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# Destination Point Administration

## Destination Point Administrator

The Destination Point Administrator (formerly called the Destination Point Contact) is the term applied to the “owner” of the destination point. The administrator is responsible for the security of data obtained through the SAIG. The administrator controls access to the SAIG through a particular destination point by setting the levels of access to EDconnect and the SAIG for each user. The administrator also maintains SAIG User Statements (see Appendix) for all users of the SAIG at a particular destination point.

### *For Security Groups*

Security Groups share a common TG Number, a common SAIG Password, common access to EDconnect features, and common access to the SAIG. Security Groups can be especially useful for institutions that have separate TG Numbers for services such as CPS, Direct Loan, and NSLDS. You can also create more than one Security Group for the same TG Number. Since each TG Number can only have one password, however, you must be careful to coordinate the password among groups sharing the same TG Number.

When a user within a Security Group connects to the SAIG, the user connects with the TG Number and SAIG password for that group. The individual user's name will appear in the Activity Log for each Send or Receive record.

The Destination Point Administrator is responsible for controlling the varying levels of access among the Security Groups set up in EDconnect by managing SAIG passwords, SAIG access, and SAIG connections at the *group* level.

### *For Users*

Users represent individuals within Security Groups sharing common access to EDconnect and the SAIG. The Destination Point Administrator is responsible for controlling each user's level of access to EDconnect and the SAIG at the group level.

When a user connects to the SAIG and sends or receives data, the user's name will appear in any Send or Receive record in the User Name column of the Activity Log

Startup options, user passwords, color preferences, and file folder locations are established at the user level.

## **SAIG User Statement**

A copy of the SAIG User Statement is shown in Appendix A. This statement may be copied. The Destination Point Administrator should have signed copies of this statement on file for each EDconnect user.

# Installing EDconnect

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## Hardware and Software Requirements

EDconnect 5.1.0 requires a connection to the Internet. You must have either a direct connection to the Internet or a dial-up connection through an Internet Service Provider (ISP). Direct connections include local area networks (LANs), DSL, T1, and cable modems. If you use a standard modem to connect to the Internet, you have a dial-up connection.

To run your SAIG and other Title IV Application System software products effectively, ED recommends the following configuration for your personal computer:

- IBM or fully IBM-compatible PC with a Pentium 200 MHz processor or higher.
- 64 MB total memory or more.
- 300 MB of available hard disk space (depending on the functions you use and how many records you store in your database).
- 56 kbps analog modem and an Internet Service Provider (ISP) *or* a direct connection to the Internet.
- Dedicated telephone line (if you connect to the Internet using a modem and an ISP).
- 3.5" high-density disk drive and 3.5" high-density double-sided diskettes.
- Windows-compatible keyboard.
- Microsoft-compatible mouse.

- Laser printer capable of printing on standard paper.
- 32-bit operating system (Microsoft Windows 95, Microsoft Windows 98, Microsoft Windows ME, Microsoft Windows NT 4.0, Microsoft Windows 2000, or Microsoft Windows XP).

## **Dial-up Networking (DUN) and Remote Access Service (RAS)**

DUN 1.2 or higher (Windows 95, Windows 98, and Windows ME) or RAS (Windows NT 4.0, Windows 2000, and Windows XP) must be installed on any computer using EDconnect, even if the computer has a direct connection to the Internet, such as a LAN, DSL, T1, or cable.

### ***Windows 95***

A compatible version of DUN is included with Windows 95, version 4.00.950B or greater. If you have Windows 95B or greater and EDconnect flags DUN as a problem when you start the program, it probably means that you do not have DUN installed on your PC. You should be able to install it from your original Windows 95 installation CD-ROM.

If you have an earlier version of Windows 95, you will need to get an update to DUN from Microsoft. This is available as a free download on the Internet:

1. Go to **microsoft.com** on the Internet.
2. Perform a search for “Dial-up Networking 1.3 Upgrade.”
3. Find a location where you can download the update.
4. Follow the instructions for downloading and installing the DUN update.

**Note:** Installing the DUN 1.3 upgrade may require your Windows 95 installation CD-ROM.

### ***Windows 98***

If you have Windows 98 installed on your PC, you should already have a compatible version of DUN on your PC.

### ***Windows ME***

If you have Windows ME installed on your PC, you should already have a compatible version of DUN on your PC.

## **Windows NT**

Windows NT, version 4.0, comes with a compatible version of RAS. If EDconnect flags RAS as a problem when you start the program, you probably do not have RAS installed. To install RAS, follow these steps:

1. Insert your Windows NT installation CD-ROM.
2. Go to **Control Panel**.
3. Double-click the **Network** icon.
4. Select the **Services** tab and click the **Add** button.
5. Scroll down to **Remote Access Service** and highlight it.
6. Select **OK**.

**Important:** After adding RAS, you must reinstall Service Pack 3 (or higher) for Windows NT. If you do not reinstall the service pack, EDconnect will continue to flag RAS as an error and you will not be able to connect to the SAIG.

## **Windows 2000**

If you have Windows 2000 installed on your PC, you should already have a compatible version of RAS on your PC.

## **Windows XP**

If you have Windows XP installed on your PC, you should already have a compatible version of RAS on your PC.

## Estimating Hard Disk Space Needs

The software takes up the following space on your hard disk:

Product	Size
EDconnect for Windows	15 MB
EDExpress	16 MB
FISAP for Windows	4 MB
Quality Assurance Program for Windows with 300 records	2 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

## LAN Compatibility

EDconnect for Windows can be used as stand-alone or as 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

Users should not run the software on peer-to-peer networks, such as Artisoft LANtastic 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, and Sun PC-NFS. Since EDconnect makes extensive use of Microsoft Access as a database engine, do not use these network operating systems with EDconnect.

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## Installation Process

This section contains detailed instructions for downloading and installing EDconnect.

EDconnect 5.1.0 is available on the FSAdownload Web site ([FSAdownload.ed.gov](http://FSAdownload.ed.gov)) in two formats. You can download the entire software package in one file, **EDcon510.exe**, or you can download the software as seven separate installments, which you can save to your hard drive or to diskettes. Please see the **Downloading Software/Paper Documentation** section for details.

If you have problems accessing the FSAdownload Web site ([FSAdownload.ed.gov](http://FSAdownload.ed.gov)) or are unable to download the software, call CPS/WAN Technical Support at 800/330-5947 for assistance.

Before you start the installation, be sure to close all Windows applications, including screensavers, e-mail notification programs, and antivirus software.

Instructions are provided for both stand-alone and network installations.

Installing EDconnect creates default folders and subfolders to manage the transfer of files between different Title IV financial aid software packages and to simplify file management. ED recommends that you use these default folders. If you change the default folders in one software package, you must remember to change the file paths in all the other software packages. Otherwise, EDconnect will not be able to locate the files because the file paths will not match.

## Downloading Software/Paper Documentation

You can download both software and paper documentation from the FSAdownload Web site ([FSAdownload.ed.gov](http://FSAdownload.ed.gov)). If you have problems accessing the FSAdownload Web site or are unable to download the software, call CPS/WAN Technical Support at 800/330-5947 for assistance.

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

The table below shows the minimum possible download time for various file sizes and modem speeds. The actual times will vary, depending on the quality of the telephone 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.

Some organizations block their employees from downloading programs from Internet sites. If you have problems downloading from the FSAdownload Web site, try again later. If you continue to experience problems, contact your technical support staff to ensure that you have full download rights.

## **Downloading the Software**

The installation package for EDconnect 5.1.0 is available in two formats. You may download the installation package as one file or in seven separate installments.

### **To download the software as one file:**

1. Type the FSAdownload Web address, **FSAdownload.ed.gov**, into the address box at the top of your browser window.
2. When you get to the site, click the **Continue** button at the bottom of the opening page. You will be taken to a “Privacy on Our Web Sites” page. Click on any of the links, or scroll down, to read information about ED’s privacy policy.
3. Click the **Continue** button to access the page containing descriptions of available ED software.
4. Click the **EDconnect** link to the left of the description of the EDconnect 5.1.0 software. This will take you to the download page for EDconnect. You can get technical support for this site by calling CPS/WAN Technical Support at 800/330-5947 or by e-mail at **cpswan@ncs.com**.
5. Click the **Full Download** link to download EDconnect 5.1.0. A **Save As...** dialog box will appear.

**Note:** If clicking the **Full Download** link takes you to a new Web page rather than starting the download process, click the **Back** button on your browser and right-click the **Full Download** link. Choose **Save Target As...** from the pop-up menu in order to start the download process.

6. Select a location on your hard drive to which to save the file, or accept the default location. Press the **Save** button. The length of time it will take the file to download depends on the speed of your Internet connection. See the table of download times in this section.

**Note:** We recommend that you download the installation file to a folder other than the one in which you will install EDconnect. You may want to create a folder called “FSAdownload,” for example, specifically for the installation files you download from the FSAdownload Web site.

7. Once you have downloaded the installation file to your hard drive, go to the folder containing the **EDcon510.exe** file and double-click it to start the installation.

### Notes

- Downloading the software does **not** install it.
- You should have no other programs running while you are installing EDconnect.

### To download the software in seven separate installments:

1. Type the FSAdownload Web address, **FSAdownload.ed.gov**, into the address box at the top of your browser window.
2. When you get to the site, click the **Continue** button at the bottom of the opening page. You will be taken to a “Privacy on Our Web Sites” page. Click on any of the links, or scroll down, to read information about ED’s privacy policy.
3. Click the **Continue** button to access the page containing descriptions of available ED software.
4. Click the **EDconnect** link to the left of the description of the EDconnect 5.1.0 software. This will take you to the download page for EDconnect. You can get technical support for this site by calling CPS/WAN Technical Support at 800/330-5947 or by e-mail at **cpswan@ncs.com**.
5. Click the **Disk 1** link to download the first disk. A **Save As...** dialog box will appear. (**Disk 1** is a self-extracting compressed, or “zipped,” file. See **Step 9** for instructions.)
6. Select a location on your hard drive to which to save the file, or accept the default location. Press the **Save** button. The length of time it will take the file to download depends on the speed of your Internet connection. See the table of download times in this section.
7. After you have downloaded **Disk 1**, click the **Disk 2** link to download the second disk. When the **Save As...** dialog box appears again, either save **Disk 2** to the same location on your hard drive as **Disk 1**, or save **Disk 2** directly to a diskette.

**Note:** Although **Disk 2** through **Disk 7** may be downloaded directly to diskettes, **Disk 1** must be unzipped before the files contained in **Disk 1** can be copied to a diskette.

8. Click on each of the disk links until you have saved all of them to the same location on your hard drive or to diskettes.

9. Once you have downloaded all the disk files, go to the location on your hard drive where you saved **disk1.exe** and double-click it. A **WinZip Self-Extractor** dialog box will appear. In the text box labeled “Unzip to folder,” type the location to which you want to extract the 19 files contained in **disk1.exe**, or use the **Browse** button to select a location.

If you want to extract the files directly to a diskette, insert a blank, formatted diskette into your disk drive. Type “A:\” (without the quotation marks) into the “Unzip to folder” text box and click the **Unzip** button. If your disk drive is drive B, type “B:\” (without the quotation marks).

### Notes

- Downloading the software does **not** install it.
- If you want to install EDconnect from your hard drive using the unzipped files, locate and double-click **setup.exe** to begin the installation program.
- If you are installing from diskettes, click on the Windows **Start** button and select **Run** from the menu. Type “A:\setup” (without the quotation marks) in the **Open** text box and press the **OK** button. Type “B:\setup” (without the quotation marks) if your disk drive is your B drive.
- You should have no other programs running while you are installing EDconnect.

## ***Downloading Paper Documentation***

Paper documentation is available to download from the Internet in both Adobe PDF and Microsoft Word format. The following types of paper documentation are available for you to download:

- Installation guides and other instructions
- Cover letters
- Desk references

Each link to the above paper documents is accompanied by a description that includes the date the document was posted, the size of the file, and the approximate download time. However, the length of time it takes to download a paper document will depend on the speed of your Internet connection. See the table of download times in this section.

### **To download paper documentation:**

1. Type the FSAdownload Web address, **FSAdownload.ed.gov**, into the address box at the top of your browser window.
2. Click the **Continue** button at the bottom of the opening page. You will be taken to a “Privacy on Our Web Sites” page. Click on any of the links, or scroll down, for information about privacy.
3. Click the **Continue** button to access the page containing descriptions of available Department of Education software.
4. Click the **EDconnect** link to the left of the description of EDconnect. This will take you to the download page for EDconnect. You can get technical support for this site by calling CPS/WAN Technical Support at 800/330-5947 or by e-mail at **cpswan@ncs.com**.
5. Click on the type of documentation you want to download.
6. If you select an Adobe PDF–formatted file, click **File, Save As...** from the menu bar, select a location on your hard drive, then click the **Save** button to save the file.
7. If you select a Microsoft Word–formatted file, click **Save this program to disk**, select a location on your hard drive, then click the **Save** button to save the file. Either type of file will be assigned a default file name. You may choose another name for the file.
8. Once you have downloaded the paper document, go to the location on your hard drive where you saved the file. Double-click the file to open the document.

## Installing EDconnect

The “Full Download” file option on the **FSAdownload.ed.gov** site allows you to install EDconnect by downloading a single file. You also have the option to download the EDconnect installation files as separate diskettes. Installing EDconnect using both options is described below.

### ***Starting the Installation from Diskette or Saved Disk Files***

1. Close any programs that are running, including antivirus software.
2. If you have unzipped **Disk 1** to a diskette and saved or copied **Disk 2** through **Disk 7** to diskettes, insert the diskette containing the **Disk 1** files into your disk drive. Click on the Windows **Start** button and select **Run** from the menu. Type “A:\setup” (without the quotation marks) in the **Open** text box. If your disk drive is drive B, type “B:\setup” (without the quotation marks). Click **OK** to start the installation.

If you saved **Disk 2** through **Disk 7** to a folder on your hard drive and unzipped the contents of **Disk 1** to the same folder, navigate to the folder using Windows Explorer. Locate **setup.exe** in the folder and double-click it to start the installation.

3. A Welcome screen will appear. See *Continuing the Installation* (p. 21).

### ***Starting the Installation from the “Full Download” File***

1. Close any programs that are running, including antivirus software.
2. Click on the Windows **Start** button and select **Run** from the menu.
3. In the text box to the right of **Open**, enter the location of the installation file, **EDcon510.exe**, by clicking on the **Browse** button and using the file selection dialog box to locate the file. Once **EDcon510.exe** appears in the **Open** text box, click the **OK** button. You can also locate **EDcon510.exe** using Windows Explorer and double-click it to start the installation.

4. An **EDconnect Installation Folder** dialog box will appear, asking you to choose a folder into which to unpack the installation files. You can accept the default location or browse to another location.

**Note:** The EDconnect program does not install to this folder. This folder is a temporary location for holding the installation files. The default is **C:\Temp\** or **C:\Windows\Temp**.

Choose **Continue**.

5. If the installation program tells you that certain files already exist on your system, select **Yes to All** to overwrite them.

**Note:** These are temporary installation files left over from the installation of an earlier version of EDconnect or other programs. It will do no harm to overwrite them.

6. Once the installation files have unpacked, the installation process will begin and a **Welcome** screen will appear. See *Continuing the Installation*, below.

### ***Continuing the Installation***

1. Select the **Next** button and the **Installation Type** dialog box will open.
2. Select either **Full** or **Upgrade** from the **Installation Type** dialog box. If you have previously installed EDconnect 5.0.0, select **Upgrade** as the Installation Type. If you are installing EDconnect for the first time, or migrating to the Internet, select **Full**.

3. Select the **Next** button and the **Setup Options** dialog box will open, prompting you to select the type of installation: **Local**, **Network**, **Workstation**, or **Self-running**. Click once on an option to highlight it and view its description at the bottom of the dialog box. Please read the explanation of each installation option below:

- Select **Local Install** if you are installing EDconnect, including the database, on a single PC.

**Note:** This is the most common installation. By selecting **Local Install**, you will install all EDconnect components, including the database, to your local hard drive.

- Select **Network Install** if you want a number of PCs to have common access to a single EDconnect database. Performing a **Network Install** places only two files on your Local Area Network: the database, **EDconn32.mdb**, and a utility file called **t4api.exe**. The EDconnect database contains the information users will share, such as the Activity Log and Security View information. A network installation does not install the program itself. After a **Network Install**, you must perform a **Workstation Install** on each PC to install the program files.

**Note:** The EDconnect database contains a record of data transfers but does **not** physically contain any of the files you have sent or received. All files you have sent or received are stored in a separate location and are unaffected by the EDconnect database. Other databases you may have on your computer, such as the EDExpress, SSCR, or FISAP databases, are also unaffected by the EDconnect database.

- Select **Workstation Install** if you are installing EDconnect on a PC that will access a network installation of the EDconnect database. Perform a workstation installation on each PC that you want to access the EDconnect database.
- Select **Self-running Install** if you want EDconnect to install itself automatically to the default folder (**C:\Program Files\EDconnect**). If you select this option, installation will start immediately after you select the **Next** button. If you choose the self-running installation option, skip to **Step 8** (p. 23).

4. Select the type of installation by clicking once on the option and then on the **Next** button. The **Destination Folder** dialog box will appear on your screen. The default destination folder is **C:\Program Files\EDconnect** for a local installation.

**Note:** For a network installation, you will need to select the appropriate LAN drive as the database location.

You can accept the default folder or change the destination folder by using the **Browse** button.

5. Select **Next** and the **Select Program Folder** dialog box will appear on your screen. This dialog box allows you to enter a new folder name, select an existing folder, or accept the default folder name of “EDconnect.”
6. Select **Next** and the **System Information** dialog box will appear on your screen. This dialog box provides information about your computer system.
7. Select **Next** and the **Install Settings** dialog box will appear, confirming that setup has enough information to begin copying files to your PC. If you want to review or change any of the settings, click on the **Back** button to return to the appropriate dialog box.
8. Select **Next**. A progress bar will appear, showing you the progress of files being copied to your hard drive. If you are installing from diskettes, the installation program will prompt you when it is necessary to insert the next diskette. When the installation is finished, EDconnect will open a window containing icons for the program and for Transmission Queue templates.
9. Click **Finish**. The installation program may ask you to reboot your computer. If you have installed the program from diskette, make sure you remove the diskette from your disk drive before rebooting.

During the installation, EDconnect creates seven Transmission Queue (TQ) template icons in EDconnect Program Group. These icons allow quick access to seven default TQ template files: **all.tqt**, **cps.tqt**, **direct.tqt**, **fisap.tqt**, **nslds.tqt**, **rfms.tqt**, and **saig.tqt**. If you select one of these icons, EDconnect will start and will automatically fill in the Transmission Queue with the appropriate data requests. For example, selecting the **all.tqt** icon starts EDconnect and places a request in the Transmission Queue for all data and all messages currently in your mailbox.

You may drag or copy these TQ icons, along with the EDconnect icon, to your desktop from the icon window that appears at the end of the installation.

## **Selecting a Connection**

EDconnect 5.1.0 uses the Internet to access the SAIG, unlike previous versions. When you log into EDconnect for the first time after installing it, you will need to select an Internet connection to use. Your Internet connection to the SAIG has no relationship to the dial-up connection used by earlier versions of EDconnect.

The drop-down list in the **Connection to Use** selection box displays a list of Internet connections available on your computer. If you have a direct connection to the Internet, such as DSL, T1, or cable, “Direct Connection” may be the only option listed. If you connect to the Internet using a modem and an Internet Service Provider (ISP), in most cases your ISP’s dial-up connection will appear on the list.

Some ISPs use proprietary Dial-up Networking connections that are created when you install their communications software. Although EDconnect may be able to dial your ISP and connect to the Internet through a proprietary dial-up connection, the connection may use protocols that will prevent EDconnect from sending and receiving data over the SAIG. Some ISP-provided communications programs do not create standard Dial-up Networking connections at all, so your Internet connection may not appear on the **Connection to Use** drop-down list.

You may select “Direct Connection” even if you connect to the Internet using a modem and an ISP. Once you connect to the Internet through your ISP, the open Internet connection becomes a “Direct Connection” that will allow EDconnect to communicate with the SAIG. Selecting “Direct Connection” and connecting to the Internet *before* using EDconnect avoids potential problems associated with proprietary dial-up connections.

If you select “Direct Connection,” you will need to connect to the Internet through your ISP the way you normally connect *before* sending and receiving data using EDconnect.

If you select your ISP’s dial-up connection and are unable to send and receive data using EDconnect, select **Customize** from the **Tools** menu and choose “Direct Connection” from the **Connection to Use** drop-down list. You will need to connect to the Internet through your ISP the way you normally connect *before* sending and receiving data using EDconnect if you select “Direct Connection.”

*Do not* select any dial-up connections associated with previous versions of EDconnect, such as “SAIG-0” or “T4WAN-0.” EDconnect 5.1.0 cannot use these connections.

## ***Firewalls***

A firewall is a barrier between your computer or your Local Area Network (LAN) and an external source, such as the Internet. The barrier can be software, hardware, or a combination of the two. A firewall examines each packet of information coming into and going out of your computer and prevents unauthorized packets from being sent or received.

A port is a pre-defined “channel,” numbered from 0 to 65535, used by your computer to send and receive specific kinds of data. Your computer usually sends and receives e-mail through port number 23 and makes standard Internet connections through port number 80.

A firewall can prevent EDconnect from communicating with the SAIG by blocking the packets of information your computer is trying to send to and receive from the SAIG. If you have trouble connecting to the SAIG after installing the EDconnect 5.1.0, contact your technical support staff to see if you are behind a firewall. “Error –1: Contact customer service for details on this error” usually means that the port used by EDconnect to send and receive data is blocked. Your technical support staff will need to open port number 26581 for inbound and outbound TCP/IP traffic and give your computer access to IP address 198.77.163.220 to allow EDconnect to communicate through the firewall.

In order to use the **TDCCommunityManager (TDCM)**, you need to be able to connect to **SAIGPortal.sfa.ed.gov** and will need standard Internet port number 80 (HTTP) and port number 443 (SSL) open. Information about using the TDCM is available in the EDconnect Documentation section on **FSAdownload.ed.gov**.

## ***Getting Help***

For help installing or using EDconnect, contact CPS/WAN Technical Support at 800/330-5947.

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## Checklist for New EDconnect Users

The following checklist leads you through the steps necessary to make your first transmission with the new version of EDconnect. You will need Windows 95, Windows 98, Windows NT, or Windows 2000 to use this version of EDconnect. The checklist assumes that you have successfully installed the program.

**Log into EDconnect.** When you run EDconnect for the first time, a dialog box will appear with the default user name of “Admin” and the default group name of “Administration Group” already selected. To log into EDconnect for the first time, enter the word “PASSWORD” (uppercase and without the quotation marks).

- **Create a Security Group.** After you log into EDconnect for the first time, EDconnect will prompt you to finish setting up the default Security Group called “Administration Group.” If you select **Yes**, the **Group Wizard** will lead you through the tabs of the **Group Properties** dialog box. The **Group Properties** settings control your access to the SAIG, as well as each user’s access within a group.
- **Perform a Local Only password change.** During the initial setup of your Security Group, EDconnect will prompt you for a new SAIG password. The first step in establishing your SAIG password is to perform a **Local Only** password change, setting your SAIG password to “PASSWORD” (uppercase and without the quotation marks). Unless you have already transmitted a password change for the same TG Number from another computer in your office running the new version of EDconnect, you must perform this step.
- If you have already transmitted a password change with the new version of EDconnect from another computer in your office, enter *that* password as a **Local Only** password change. Under these circumstances, you do not need to perform a **Network and Local** password change.
- **Change your SAIG password.** After you perform a **Local Only** password change, you must perform a **Network and Local** password change to establish your password on the SAIG. When you change your SAIG password, be sure to select **Network and Local**. This will add a password change record to the **Transmission Queue**. EDconnect will transmit the password change the next time you connect to the SAIG.

- **Set up a personal User ID.** When you run EDconnect for the first time, you must log in with the self-expiring **User ID** “Admin” using the password “PASSWORD” (uppercase and without the quotation marks). After you set up your Security Group, EDconnect will prompt you to create a new **User ID**. If you select **Yes**, the **User Wizard** will lead you through the tabs of the **User Properties** dialog box.

When you have finished, EDconnect will log you in with your new **User ID**. At this point, you may create a **User ID** for each person who will be using EDconnect at your institution. Each SAIG user at your institution will need a separate password for logging into EDconnect.

- **Select a connection for transmitting data.** If you have not selected a connection for transmitting data, EDconnect will prompt you to do so each time you start the program. If you select **Yes**, the **Properties** dialog box will appear, allowing you to select a connection. See **Selecting a Connection** in the **Installation** section of this guide for further information.
- **Download the message class table.** Shortly after you migrated, an updated message class table will be sent to your SAIG mailbox. When you connect to the SAIG, the message class table will automatically download to your PC and import into EDconnect. If you have several PCs with local installations of EDconnect accessing the same SAIG mailbox, you will need to download the message class table from **FSAdownload.ed.gov** for each PC.
- **Coordinate global file paths for sending and receiving files.** EDconnect does not automatically create paths for sending and receiving data. If you do not specify **Send** and **Receive** paths, EDconnect will use the paths listed in the **Filename** field of the **Message Class Manager**.

You can change the paths on the “Directories” tab of the **User Properties** dialog box. Right-click on the **User ID** you wish to edit and select “Properties” from the pop-up menu. Click on the “Directories” tab. At the top of the tab, a drop-down list will allow you to select **Database**, **Send**, or **Receive**.

The **Database** path will reflect the current location of the EDconnect database, but the **Send** and **Receive** paths will be blank. Select **Send** or **Receive**, then type in the full path, including drive letter, or use the **Browse** button to find the correct folder.

Be sure to enter a location for both the **Send** and **Receive** folders. If you would like to use the same setting for all existing users in a specific group, place a check in the box marked “Set all users of this group to the specified directories.”

# Appendix A: SAIG User Statement

Anyone who accesses Title IV program data and uses resources that access SAIG (such as computers or workstations) must read and sign this statement. Keep a copy of the signed statement for your records. A signed original SAIG User Statement must be completed and maintained by the destination point administrator for each of the destination points (electronic mailboxes) to which you have access.

A SAIG User understands that if he or she intentionally submits false or misleading information to the U.S. Department of Education, he or she will be subject to a fine up to \$10,000, imprisonment for up to five years, or both, under provisions of the United States Criminal Code (including 18 U.S.C. 1001). The SAIG User also agrees to comply with all provisions of Section 483 of the Higher Education Act of 1965, as amended.

A SAIG User understands that the information provided to him or her by the U.S. Department of Education is protected by the Privacy Act of 1974, as amended. Protecting this information, once it is entrusted to the SAIG User, becomes his or her responsibility. Therefore, the SAIG User agrees to protect the privacy of all information that has been provided to him or her by the U.S. Department of Education. The SAIG user understands that any person, including himself or herself, who knowingly and willfully requests or obtains any record concerning an individual from an agency under false pretenses shall be guilty of a misdemeanor and may be fined not more than \$5,000.

## Appropriate Use

At a minimum, appropriate use consists of the following:

- Using SAIG computing resources only for official government business. Any other use must be approved expressly by the U.S. Department of Education.
- Knowing the SAIG destination point administrator for each of the destination points you access and how to contact them.
- Protecting all SAIG information from access by or disclosure to unauthorized personnel.
- Reporting immediately to your destination point administrator any security incidents, potential threats, or vulnerabilities that involve SAIG resources.
- Protecting any tools, such as passwords, that allow you access to SAIG (these tools are called “authenticators”).
- Reporting to your destination point administrator any compromise, suspected compromise, or incidents of sharing of a password or any other authenticator.
- Accessing only systems, networks, data, control information, and software for which you are authorized.
- Ensuring that all information that comes from SAIG is marked according to its sensitivity and is properly controlled and stored.
- Informing your destination point administrator when you no longer need access to a SAIG resource, such as when you change jobs or leave employment.
- Avoiding the introduction of any code that might be harmful to SAIG.

TG# \_\_\_\_\_ Destination Point Administrator (DPA) Name \_\_\_\_\_

SAIG User Name \_\_\_\_\_  
(Print)

SAIG Job Title \_\_\_\_\_ SSN \_\_\_\_\_ Phone #(\_\_\_\_) \_\_\_\_\_

SAIG User Signature \_\_\_\_\_ Date \_\_\_\_\_

DPA Signature \_\_\_\_\_ Date \_\_\_\_\_

**NOTE: This statement, with an original signature, must be maintained by the Destination Point Administrator. DO NOT SEND THIS TO SAIG.**