

April 2001

RE: EDEExpress for Windows 2001-2002, Version 7.2

Dear EDEExpress Users:

We are pleased to announce the availability of EDEExpress for Windows 2001-2002, Version 7.2. This version expands EDEExpress to include the Federal Pell Grant module for the 2001-2002 award cycle and provides additional changes to the software.

This letter describes specific enhancements to the Pell module and general changes to EDEExpress for Windows' previously released versions. It includes the following:

- A list of Pell enhancements,
- A list of issues from Version 7.1 that have been improved,
- The results gathered from EDEExpress benchmark testing, and
- A reminder to back up and optimize your EDEExpress database.

NOTE: RFMS will accept and begin processing Pell Origination files on May 1 and Disbursement files beginning on June 21. Files received before the appropriate processing date will be rejected. Since RFMS cannot receive and hold Origination files from EDEExpress, schools may begin using the software, but should not export Origination files to RFMS until May 1.

How to Get the Software and Documentation

We are distributing EDEExpress for Windows 2001-2002, Version 7.2 via the Internet. You can download the software and the related user documentation from the SFAdownload Web site (located at **SFAdownload.ed.gov**).

The "Downloading Software/Paper Documentation" chapter of the *EDEExpress for Windows 2001-2002 Installation Guide* provides complete installation instructions.

If you have trouble opening the SFA download Web site or have difficulty in downloading EDEExpress for Windows, Version 7.2 software, call CPS/WAN Technical Support at **800/330-5947** to request diskettes.

NOTE: Some organizations restrict their users from downloading from FTP sites. You may want to contact your technical support staff to obtain full FTP download rights.

If You Have Technical Support and Policy Questions

If you have SFA technical support questions and subscribe to SFATECH, you can post e-mail on the SFATECH listserv located at:

www.ed.gov/offices/OSFAP/sfatech/listserv.html

Make sure you include your telephone number in your message. Department staff or contractors for the system about which you have a question will see your posting and begin preparing a response.

If you have questions regarding EDExpress for Windows such as installation issues, software problem resolution, software functionality, and technical assistance, you can call CPS/WAN Technical Support. You can reach them Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947**. You can also e-mail inquiries, comments, or suggestions 24 hours a day to **CPSWAN@NCS.COM**. A representative will respond within 24 hours.

CPS/WAN Technical Support

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EDExpress for Windows, Version 7.2

EDExpress consists of four software modules:

- Application Processing
- Packaging
- Direct Loan
- Pell

Version 7.2 installs the Pell module and updates Version 7.1, which included the other three modules.

Pell Enhancements

We made the following enhancements in EDExpress for Windows 2001-2002, Version 7.2 software.

General Changes

- Year indicators and date ranges for the 2001-2002 award year are updated.
- All references to Institution have been changed to School throughout the software except in the Record Layouts and Message Codes from RFMS.
- The following message classes are new for 2001-2002:
 - PGOP - Origination Acknowledgement Records from the Web
 - PGDW - Disbursement Acknowledgement Records from the Web
 - PGRC - Reconciliation Record
- Beginning with the 2001-2002 cycle, you can import all Demographic Data and/or User-Defined Queries from your prior year database. You are prompted with these options each time you enter the software. The prompts continue until you execute one of the options or until you mark the checkbox to no longer display them. Some security information is also brought forward, but you must reauthorize the level of security for all. School Setups and Queries that reference User Database, date parameters, modified or deleted fields cannot be brought forward.

Setup

- A new checkbox option, Ineligible During the Award Year?, has been added at the Attended Campus level. It allows you to indicate that your school was ineligible at some point during the award year and prompts you to enter a Payment Period Start Date when processing disbursement records on the Disbursement tab.

Disbursement

- Special Disbursements are no longer part of the Pell software since the associated data elements are no longer collected by RFMS.
- The Payment Period Start Date has been added to the Disbursement tab. It is a required field if (1) a school has become ineligible at any time during the reporting Award Year and (2) the Ineligible Flag is checked in Pell School Setup.
 - In Setup, if the Ineligible During the Award Year box is checked, you must enter a Payment Period Start Date on the Disbursement Tab.
 - RFMS will accept Origination and associated Disbursement records for a student only if the Payment Period Start Date falls within the school's eligible award period.
- An optional Cross Reference field has been added to assist a school in tracking Disbursements by payment period. The field can contain any internal information that is helpful in tracking your disbursement activities.
- The RFMS Year-to-Date amount on the Disbursement Tab is now populated with the Year-to-Date Disbursed amount from the Origination Record.

Entry

- Data elements for Special Disbursement have been removed from the Disbursement Tab.
- Payment Period Start Date has been added to the Disbursement Tab.
- A new RFMS status code for D (Duplicate Accepted Records) has been added. The internal status in EDEExpress will be set to A (Accepted) for any duplicate accepted Origination or Disbursement record that is brought forward from the RFMS import acknowledgement.

Entry (Continued)

- There are additional field options available for you to update Pell records. The selections under Process| Multiple Entry | Pell have been expanded to include:
 - Credit/Clock Hours in Academic Program
 - Credit/Clock Hours to Complete This School Year
 - Enrollment Status
 - Estimated Disbursement Date #1
 - Payment Period Start Date
 - Weeks of Instructional Time Used to Calculate Payment
 - Weeks of Instructional Time in Program's Academic Year
- A new School Internal Sequence Number is established for schools that use EDEExpress software in combination with external systems. It is a display only field that is populated by way of the External Add/Change Import. You may assign a number to this field and increment it each time an origination record for the same student is sent to RFMS.
- Schools can use the ellipsis button to select from the ISIR grid and change origination records that are rejected due to an incorrect transaction number. The user is now prompted to change the record status to R (Ready) before saving the transaction.

Process

- Separate edits are performed on Origination and/or Disbursement fields when using Process | Multiple Entry | Pell. The edit logic runs against the type of record selected. If Origination and Disbursement fields are selected for update, origination edits will run first and Disbursement edits will run last. A report is also generated for records with errors or exceptions.
- Schools are able to run Process | Calculate to originate award amounts at the batch level. This function was only available at the record level in previous modules of the software. A status report is generated at the end of the process. The report lists records that were set to an R (Ready) status and records that remained at an N (Not Ready) status.

Import

- When importing Year-to-Date data, the Print All? option now provides a list of a school's Year-to-Date activity as it is posted in RFMS. However, the Compare and Print Exceptions? and Print All? options cannot be selected at the same time. This enhanced edit report includes the data from the following fields.
 - Origination ID
 - Name
 - Accepted Award Amount for the Entire School Year
 - YTD Disbursed Amount
 - Disbursement Reference Number
 - Accepted Disbursement Amount
- The ISIR Import process has been modified for CPS selected records that display a value of N in the Pell Verification Status field on the student's Demo Tab. Now records selected for Verification by CPS and entered in the Student Demo with an N (Not Selected) or S (Selected) status are being set to a W (Without Documentation) when brought forward to the Pell Tab.
- A Reconciliation File has been added as a new import type. Now you may request a YTD reconciliation file on demand.
- EDEXpress internal status will be set to A (Accepted) for the D (Duplicate Accepted) Record status code that is brought forward from the RFMS import acknowledgement.
- Schools can use the External Disbursement Add/Change process to update existing disbursement references for disbursement statuses of E (Rejected) or R (Ready). The Prompt for Duplicates? option now accepts changes to existing records with an R (Ready) or E (Rejected) status. An E (Rejected) record is updated to R (Ready) status if it passes all end of entry edits.

Export

- Records with an RFMS Disbursement Status of E (Rejected) will be automatically included in the file that is sent to RFMS during the Disbursement Export process. You are no longer required to open individual records and modify the data in order for the record to be batched.
- The requirement to enter an Attended Campus ID on the Export Dialog Box has been eliminated when requesting Year-to-Date records. You now have the option to process one Data request to receive a YTD report for all of your Attended Campus YTD data files.

Print

- The following predefined queries for Pell record statuses are now available:
 - Origination Status
 - RFMS Origination Status
 - Disbursement Status
 - RFMS Disbursement Status
- Users have the added ability to print multiple Electronic Statements of Account (ESOA) if more than one Pell Grant Account Statement (PGAS) file is imported into the software. The software also includes a record selection option for choosing a specific ESOA record for printing.
- The Print-Origination List now displays the secondary EFC when it is used.

Pell References

What's New in the 2001-2002 Pell module of EDEExpress for Windows is available in Pell Online Help. The online help provides detailed instructions to assist you in using the new enhancements.

The *RFMS Technical Reference* also contains Pell system information for combination schools electing to simultaneously use EDEExpress for Windows and their own system or vendor-provided software. The *Reference* includes record layouts, valid field content, system edits, and report mockups. The 2001-2002 publication can be obtained from the SFA download Web site (located at SFAdownload.ed.gov).

Issues Addressed in EDEExpress, Version 7.2

EDEExpress, Version 7.2 provides the following additional changes to the software.

Global

- 3442 When updating User Security profiles under Tools | Setup | Global | Security Users, the software will now prompt you to save changes if you mark the “Export to EDconn32?” checkbox and attempt to exit without specifically clicking the Save button.
- 3464 The online help links for LOC and RFMS have been fixed under the “Record Layouts” Help Topic.
- 3489 A database update process will run following a Custom Installation of Version 7.2, which will clear all Pell data existing in the 2001-2002 database. The 2001-2002 Pell module could be enabled during a Custom installation of Version 7.1, but the module was at that time still under development. Schools were advised in a network message posted in mid-March not to perform any 2001-2002 Pell setup or entry until installation of Version 7.2 was complete.
- 3503 After clicking the Add option under Tools | Setup | Global | School, the software will now automatically focus on the School Code field (so you do not have to click on this field with your mouse to begin entry).
- 3509 Global online help has been updated to indicate you must right-click on a column heading under Tools | Setup | Global | School in order to view additional search options.

Application Processing

- 3434 ISIRs will now print the processed CPS Assumed Value for Student Worksheet C instead of the amount originally entered by the applicant.
- 3435 Application Processing Query has been updated to allow queries on null values for Assumed Student's Total from Worksheet C.
- 3439 "Totals" statistics will now be displayed at the end of the List - Entered Application Records, List - Entered Correction Records, and List - Entered Duplicate Requests reports.
- 3445 Application Processing online help has been updated to accurately convey that a Student's Tax Filing Status is not taken into account when the CPS processes Assumption Override Codes 2 and 4.
- 3458 The software will close properly and will no longer generate an "abnormal program termination" error when exiting 2001-2002 EDExpress after running an External ISIR export.
- 3495 The software will no longer generate the error message "Greport: Failed to open recordset - Reason: Join expression not supported" when using the SSN File/Enter Multiple SSNs criteria option on the List - Processed ISIRs report.
- 3512 The Paid EFC Type will now display either a "P" (Primary EFC) or an "S" (Secondary EFC) on the report generated when running Process | EFC Calculation from a student's SAR/ISIR tab.
- 3545 ISIR Comment Code text has been updated for ISIR Comment 53, which is generated when a student leaves the Drug Question blank on a transaction. The comment code text reads "You left 'Drug Conviction Affecting Eligibility?' blank. Your failure to provide an answer to this question makes you ineligible to receive Title IV aid. Either indicate that you have never been convicted of possessing or selling illegal drugs or use the enclosed worksheet to determine your answer to this question. In any case, you can correct this item by calling 1-800-4FED-AID (1-800-433-3243) or by going to www.fafsa.ed.gov. You can also see your Financial Aid Administrator for assistance. Please understand that a drug conviction does not necessarily disqualify you from receiving student aid."

Packaging

- 3316 The heading for the Packaging Multiple Entry report now references the 2001-2002 cycle (instead of 1999-2000).
- 3466 Schools running 2001-2002 EDEExpress in a Windows 2000 environment will no longer receive a Windows system error (such as a “Dr. Watson” message) when adding funds manually to an already-Packaged student record.
- 3520 Online help has been corrected to point to the appropriate text for the “Do Not Remove if Unpackaged?” option when you press F1 on the Fund Maintenance setup screen and select the link for information on that field.

Direct Loan

- 3412 Two new fields have been added to Direct Loan Multiple Entry to allow schools to run the equivalent of Process | Verify on multiple loan records at once.
- 3490 Query Valid Values for the Record Source field on the Demo and Loan tabs have been updated to include the value “R,” which indicates the record was created via the Rebuild process available in the upcoming DL Tools Version 1.0 software (due for release in June 2001).
- 3513 The Direct Loan School Account Statement (DLSAS) report has been updated to display the Interest Rebate value for loan detail records.
- 3514 The Record Layout for the Direct Loan School Account Statement (DLSAS) report has been updated to display correct field descriptions for field 18 (Disbursement Actual Interest Rebate - LOC), field 19 (Disbursement Net Amount - LOC), and field 20 (Adjusted Net Disbursement Amount - LOC).
- 3544 Direct Loan online help has been updated to provide the correct definition for the PLUS loan Credit Decision field value of “C” (Credit Overridden; new credit information provided).
- 3564 Valid Values for Parents’ and Student’s Citizenship State will now print on PLUS promissory notes printed prior to origination globally or from the Loan tab.
- 3593 External Import Add process has been updated to reject records with zero or blank as a value for the Interest Rebate Percentage field.
- 3594 The External Import Change process has been updated to correctly translate decimal places when updating the Interest Rebate Percentage.

EDExpress Supports These Printers

We tested the following printers that are Windows NT 4.0, Windows 95, Windows 98, and Windows 2000* compatible:

- HP LaserJet 3 si
- HP LaserJet 4
- HP LaserJet 4M
- HP LaserJet 4M Plus
- HP LaserJet 4 si
- HP LaserJet 5M
- HP LaserJet 5 si
- HP LaserJet 5 si MX
- HP LaserJet 4000N
- HP LaserJet 8000N*

*There is currently no functional Windows 2000 print driver for the HP LaserJet 8000N printer.

EDExpress Benchmarking

We performed benchmarking tests on the EDExpress for Windows, Version 7.2 software to determine how it operates in certain operating environments. The benchmarking results for importing were obtained using a Pentium 200 with 64 MB of RAM. Those for print benchmarking were obtained using a Pentium II 266 with 64 MB of RAM.

- The Benchmarking Volume is the number of records and approximate number of pages that were printed in the test.
- The Average Time Elapsed column indicates the measurement of time starting when you click OK in the EDExpress Print dialog box and when the operating system (Windows NT/95/98/2000) print dialog appears.

The outcomes for an assortment of EDExpress report runs and output events are listed in the tables that follow.

Note: The minimum hardware and software specifications, published in the Federal Register on September 19, 1997, still apply for 2001-2002. The minimum hardware and software specifications published in the Federal Register on December 22, 2000, will be applicable for 2002-2003.

Reports

Report	Operating System	Benchmarking Volume	Average Time Elapsed
Award Letters	NT 4.0	3 records	2 seconds
Award Letters	Windows 95	3 records	2 seconds
Award Letters	Windows 98	3 records	2 seconds
Award Letters	Windows 2000	3 records	2 seconds
Document Tracking Letter	NT 4.0	5 records	3 seconds
Document Tracking Letter	Windows 95	5 records	2.5 seconds
Document Tracking Letter	Windows 98	5 records	2.5 seconds
Document Tracking Letter	Windows 2000	5 records	3 seconds
ISIR	NT 4.0	2 records	1.5 seconds
ISIR	Windows 95	2 records	2 seconds
ISIR	Windows 98	2 records	2 seconds
ISIR	Windows 2000	2 records	2 seconds
Mailing Labels	NT 4.0	65 records	1 second
Mailing Labels	Windows 95	65 records	1 second
Mailing Labels	Windows 98	65 records	1 second
Mailing Labels	Windows 2000	65 records	1 second
Packaging Setup	NT 4.0	25 pages	2 seconds
Packaging Setup	Windows 95	25 pages	2 seconds
Packaging Setup	Windows 98	25 pages	2 seconds
Packaging Setup	Windows 2000	25 pages	2 seconds
Processed ISIRs	NT 4.0	29 records	1 second
Processed ISIRs	Windows 95	29 records	1 second
Processed ISIRs	Windows 98	29 records	1 second
Processed ISIRs	Windows 2000	29 records	1 second

Packaging

The benchmarking results of the EDExpress Packaging process were as follows.

Component	Operating System	Benchmarking Volume	Average Time Elapsed
Award Letters	NT 4.0	3 records/9 pages	2 seconds
Award Letters	Windows 95	3 records/9 pages	2 seconds
Award Letters	Windows 98	3 records/9 pages	2 seconds
Award Letters	Windows 2000	3 records/9 pages	2 seconds
Packaging Setup	NT 4.0	25 pages (average)	2 seconds
Packaging Setup	Windows 95	25 pages (average)	2 seconds
Packaging Setup	Windows 98	25 pages (average)	2 seconds
Packaging Setup	Windows 2000	25 pages (average)	2 seconds

Direct Loan Import

The benchmarking results of the EDEExpress Direct Loan process were as follows.

Component	Operating System	Benchmarking Volume	Average Time Elapsed
External Change	NT 4.0	1000 records	12 mins, 1 sec
External Change	Windows 95	1000 records	9 mins, 11 secs
External Change	Windows 98	1000 records	9 mins, 38 secs
External Change	Windows 2000	1000 records	9 mins, 41 secs
ISIR Import	NT 4.0	1000 records	8 mins, 57 secs
ISIR Import	Windows 95	1000 records	8 mins, 53 secs
ISIR Import	Windows 98	1000 records	8 mins, 55 secs
ISIR Import	Windows 2000	1000 records	8 mins, 40 secs

Direct Loan Printing

The benchmarking results of the EDEExpress MPN/PLUS Promissory Note print and List Anticipated Disbursement report were as follows.

Component	Operating System	Benchmarking Volume	Average Time Elapsed
List – Anticipated Disbursement	NT 4.0	5 records/3 pages	1 second
List – Anticipated Disbursement	Windows 95	5 records/3 pages	1 second
List – Anticipated Disbursement	Windows 98	5 records/3 pages	1 second
List – Anticipated Disbursement	Windows 2000	5 records/3 pages	1 second
Prom Notes – MPN	NT 4.0	2 notes/4 pages	2 seconds
Prom Notes – MPN	Windows 95	2 notes/4 pages	2 seconds
Prom Notes – MPN	Windows 98	2 notes/4 pages	2 seconds
Prom Notes – MPN	Windows 2000	2 notes/4 pages	2 seconds
Prom Notes – PLUS	NT 4.0	2 notes/4 pages	1 second
Prom Notes – PLUS	Windows 95	2 notes/4 pages	1 second
Prom Notes – PLUS	Windows 98	2 notes/4 pages	1 second
Prom Notes – PLUS	Windows 2000	2 notes/4 pages	1 second

Pell Import

The benchmarking results of the EDExpress Pell Import YTD Data and Pell Import Origination Data from ISIRs were as follows.

Component	Operating System	Benchmarking Volume	Average Time Elapsed
Pell YTD Data	NT 4.0	2190 records	54 secs
Pell YTD Data	Windows 95	2190 records	1 min 21 secs
Pell YTD Data	Windows 98	2190 records	1 min 9 secs
Pell YTD Data	Windows 2000	2190 records	51 secs
Origination Data - ISIRs	NT 4.0	1000 records	44 secs
Origination Data – ISIRs	Windows 95	1000 records	55 secs
Origination Data – ISIRs	Windows 98	1000 records	53 secs
Origination Data – ISIRs	Windows 2000	1000 records	45 secs

Pell Printing

The benchmarking results of Pell Origination Record and Pell Disbursement List reports were as follows.

Component	Operating System	Benchmarking Volume	Average Time Elapsed
Pell Origination Record	NT 4.0	3 records/6 pages	1 second
Pell Origination Record	Windows 95	3 records/6 pages	1 second
Pell Origination Record	Windows 98	3 records/6 pages	1 second
Pell Origination Record	Windows 2000	3 records/6 pages	1 second
Pell Disbursement List	Windows 95	41 records/3 pages	1 second
Pell Disbursement List	Windows 98	41 records/3 pages	1 second
Pell Disbursement List	Windows 2000	41 records/3 pages	1 second
Pell Disbursement List	NT 4.0	41 records/3 pages	1 second

Reminders

Back Up Your Database Weekly

You should back up your EDEExpress for Windows database file, EXPRES12.mdb, regularly so you don't lose your data. We recommend that you back up your files at least weekly. You should also back up your data before and after you run utilities as a precautionary measure.

EDEExpress for Windows does not include a backup utility. You must use your own backup software. You should test your backup software to verify its reliability to successfully restore your backups.

Optimize Your Database by Using Software Utilities

The EDEExpress for Windows software contains utilities that allow you to optimize your database if you encounter problems. We recommend that you repair, compact, and verify your database once a week. Once all three are successful, back up the database (see section above).

Run the database utilities in the following order:

- Repair Database
- Compact Database
- Verify Database
- Repair Database
- Compact Database

For specific information regarding repair, compact, and verify, see the appropriate section below.

Run the Repair Database Utility

The Repair Database utility resolves inconsistencies (also called database corruption) in records storage. Events such as a power outage or a LAN failure can corrupt your database if it occurs while EDEExpress for Windows updates your records.

EDEExpress may not detect database corruption. If your system behaves unpredictably (for example, you start getting database error messages, even for something as simple as a missing flag on a record), use the repair database utility. Running this utility weekly helps to prevent database problems.

Warning: Before using this utility, be sure you have space on your hard drive that is at least equal to three times the current size of the database.

Improve Performance by Using the Compact Database Utility

The Compact Database utility improves the performance of EDEExpress for Windows by optimizing the database (EXPRES12.MDB) file and reclaiming space on your computer's hard drive. As you add, modify, or delete records in EDEExpress for Windows, the database file can become fragmented.

Running this utility weekly makes the database files smaller and improves system performance. It can also significantly reduce the size of your database. This does not mean that records were removed, only that the database is more compact.

Warning: Before using this utility, be sure you have hard drive space available at least equal to three times the current size of the database.

Prevent Problems by Using the Verify Database Utility

The Verify Database function checks for data relationship integrity in your database. If EDEExpress for Windows crashes or abnormally halts processing, a record may be missing one of its associated records. Verify Database recreates the missing record.

Running this function weekly helps to prevent problems.

Warning: Before using this utility, be sure you have hard drive space available that is at least equal to three times the current size of the database.