
Installation Guide for

FAFSA Express for Windows

2002-2003

U.S. Department of Education



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Introduction

Preface

FAFSA Express is a software package provided by the U.S. Department of Education (ED) for these Application Processing functions:

- Entering and editing FAFSAs
- Generating batches of applications for transmission over the Student Aid Internet Gateway (SAIG) to the CPS
- Generating and printing reports

FAFSA Express works with a telecommunications software package called EDconnect to enable you to send and receive data over the SAIG. The *SAIG Desk Reference for EDconnect* includes EDconnect software instructions. You can download the *SAIG Desk Reference for EDconnect* from the U.S. Department of Education's Student Financial Assistance Download (SFAdownload) Web site located at **SFAdownload.ed.gov**.

Software Assistance

For help with FAFSA Express, call CPS/WAN Technical Support at:

800/330-5947 (TDD/TTY: 800/511-5806)

or e-mail them at:

cpswan@ncs.com

When You Call Technical Support

When you call CPS/WAN Technical Support, **800/330-5947**, you must be at your PC and prepared to provide the following information:

- Your TG ID (the ID you were assigned that starts with *TG* followed by a 5-digit number starting with 5, 6, or 7). When you call, you are asked to enter the last five digits of your TG ID on your telephone keypad. For example, for **TG50001**, enter **50001**. The technical support representative may ask you for your TG ID again to be certain that you receive the specific help you need.
- The version of the software you are using (under **Help, About FAFSA Express for Windows**).
- The type of hardware and network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, 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.

Instructions

Downloading the Software and Documentation

You can download the FAFSA Express software and the related user documentation from the SFAdownload Web site located at **SFAdownload.ed.gov/FAFSA/fexpress.html**.

The software is available in two formats. You can download it in one compressed file (called FAFSAExpress10.exe), or you can download it in separate installments, which can then be copied to a network drive or diskettes.

Downloading the Software as One File

1. Go to the URL field located at the top of your browser's screen and type the SFAdownload Web site address: **SFAdownload.ed.gov/FAFSA/fexpress.html**.
2. Click on the **Software** button on the left-hand side of the screen.
3. Click **FAFSA Express 2002-2003** to the left of this description. You are taken to the download site.
4. Click the **Full Download** link to download the program that allows you to do the full installment. A **Save As...** dialog box appears.
5. Choose the location on your hard drive where you want to save the file, then press the **Save** button. You should write down the location where you saved the file for the next step. The length of time it takes to download the software depends largely on the speed of your Internet connection.
6. Once the file is downloaded to your hard drive, go to that location and double-click **FAFSAExpress10.exe** to extract the file and install the software.

Downloading the Software in Separate Installments

1. Go to the URL field located at the top of your browser's screen and type the SFAdownload Web site address: **SFAdownload.ed.gov/FAFSA/fexpress.html**.
2. Click on **Software** button on the left-hand side of the screen.
3. Click **FAFSA Express 2002-2003** to the left of this description. You are taken to the download site.
4. Click **Disk 1**. At the **Save As...** dialog box, choose the location on your hard drive to save the file. Click **Save**. You should write down the location where you saved the file for step 7.

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

5. Click **Disk 2**. When the **Save As...** dialog box appears again, save **Disk 2** to the same location as you saved Disk 1.
6. Click each succeeding disk until they have all been saved to the same location on your hard disk.
7. Once the software disk files are downloaded to your hard disk, 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.

Downloading Paper Documentation

You can download the FAFSA Express Cover Letter and this installation guide, in either Adobe PDF or Microsoft Word format, from the SFAdownload Web site located at **SFAdownload.ed.gov/FAFSA/fexpress.html**.

Each document shows 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.

Follow these steps to download paper documentation:

1. Go to the URL field located at the top of your browser's screen and type the SFAdownload Web site address: **SFAdownload.ed.gov/FAFSA/fexpress.html** .
2. Click on **References and Documentation** button on the left-hand side of the screen.

3. Click **FAFSA Express 2002-2003** to the left of this description. You are taken to the download site.
4. Click on the type of documentation you want to download: **Adobe PDF** or **Microsoft Word**.

Adobe PDF

If you select an Adobe PDF formatted file, click **File, Save As** from the menu bar, select a location on your hard disk, and then click the **Save** button to save the file.

Microsoft Word

If you select a Microsoft Word formatted file, a dialog box appears. Click on **Save To Disk**, choose a location to save the file, and press the **Save** button in the Save As box.

5. For either type of file, the Web site is designed to give it a default name; however, you may choose another name for the file. You should write down the location where you downloaded the file for the next step.
6. Once the paper document has been downloaded to your hard disk, go to the document's location and double-click on the file to open and/or print it.

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.

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

Getting Help

Some organizations restrict their users from downloading from FTP sites.

- If you are having trouble downloading (for example, you are prompted for a user ID and password or just can't download), try again later.
- If you are unable to download, contact your technical support staff to ensure you have full FTP download rights.
- If you have trouble opening the SFAdownload Web site located at **SFAdownload.ed.gov/FAFSA/fexpress.html**, contact CPS/WAN Technical Support at **800/330-5947**.

Installing the Software

Downloading the software from the SFAdownload Web site does not install it. After downloading the software to your network or hard drive, you must install it. The instructions in this section refer to single-user installation. For LAN installation instructions, see the “Installing FAFSA Express on a Network” section in the Appendix.

Be sure all Windows applications, including screen-savers and e-mail notifiers, are closed before you begin the installation. Follow the prompts provided by the software when installing FAFSA Express.

Installation Options

During the installation process, FAFSA Express asks you to select one of these installation options:

Full

Use this option when you are installing FAFSA Express for Windows 2002-2003 for the first time, and you want all available FAFSA Express software modules installed.

Warning for Subsequent Installations: Use caution when using the Full installation option. The program overwrites, removes, and erases your existing FAFSA Express database (FAFSA23.mdb) and all program files including (FAFSAExpress10.exe), as well as any annotations you may have made to online Help.

Custom

Use a Custom installation in one of two ways:

- If you have already installed a full version of FAFSA Express, 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); for example, FAFSA Express Version 1.x. This is the Custom default selection.

FAFSA Express Folders

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

C:\Program Files\EDESuite\FAFSA Express 2002-2003

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 can use a different name for the folder.

Caution: If you change the folder location and name, you must change them with each FAFSA Express software update you receive.

The default program folder used in FAFSA Express is called “EDESuite.” You can change this name.

Installing from the FAFSAExpress10.exe File

1. Go to the location of the FAFSAExpress10.exe file.
2. Double-click the file to open and/or install it. The file decompresses itself into a temporary folder (usually “c:\temp”) and continues the installation from there.
3. FAFSA Express asks you a series of questions during the installation. These questions verify the location of the software on your hard drive and 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 can change the default answer, if you want. If you do, make sure you know the folder where the software is located.

4. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.

5. When the installation program is finished installing the files for FAFSA Express, it updates your Start menu. It does not, however, create desktop icons/shortcuts or update them if they have already been created. You are prompted to reboot the system to complete the installation.

Note: To create a shortcut from the Start Menu\Programs\EDESuite:

1. Right click on the **FAFSA Express for Windows** icon, drag, and drop it onto your workstation desktop.
2. Select **Create Shortcut(s) Here**

Install Log

Each time an installation is performed, an install log is created. The information tracked is the product and version number, type and nature of the install, drive/folder, date, and time of install. This file is named INSTALL.log and is located in your **C:\Program Files\EDESuite\FAFSA Express 2002-2003** folder (or the location you specified during the installation process).

Example:

<APP NAME>	FAFSA Express for Windows 2002-2003
<VERSION>	1.X
<TYPE>	Stand Alone Full
<SUMMARY>	New release.
<TARGET>	C:\Program Files\EDESuite\FAFSA Express 2002-2003
<DATE>	02-02-2002
<TIME>	08:36:54

Uninstall

To uninstall FAFSA Express, click **Start, Programs** from your Windows desktop and select **EDESuite, FAFSA Express 2002-2003** to see an icon for the Uninstall utility.

Choosing Uninstall deletes all icons, the software's program group, all executable files, all DLLs, and the entire database for the version of FAFSA Express you have installed (except for the INSTALL.log file).

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

Note to Windows NT Users: In order to perform an uninstall, you must have the same or greater Windows NT access rights as the person who originally installed FAFSA Express.

To Uninstall FAFSA Express for Windows 2002-2003

1. Double-click 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**.

FAFSA Express 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.

Changing the FAFSA Express Database Path

If you need to change the FAFSA Express database path, contact CPS/WAN Technical Support at **800/330-5947**.

Starting FAFSA Express

Now that you have downloaded and installed the software, you are ready to start FAFSA Express.

1. From your start menu, select **Start, Programs, EDESuite, FAFSA Express for Windows**, or double-click the **FAFSA Express** icon, if you created one, from the Windows desktop. See "Installing from the FAFSAExpress10.exe File" for instructions to create an icon. The Startup Information box may appear. This box displays messages, warnings, or errors. For example, space on your hard disk may be low or your computer may not have enough memory available to run the software.
2. Review the messages, warnings, or errors displayed.
3. Click **Close** or press **Enter** to close the Startup Information box. The FAFSA Express main screen appears.
4. Select **Tools, Setup** and set up your System and School options.
5. Select **File, New** to begin creating a student record.

Getting Help

Basics

Here's how to get help with installing and using FAFSA Express:

- Review installation instructions.
- Check your PC's configuration to make sure you meet the system requirements found in the "System Requirements" section of the Appendix.
- Contact your system administrator.
- Use FAFSA Express online Help.
- Contact CPS/WAN Technical Support at **800/330-5947**.

These approaches are described in the succeeding sections.

Review Installation Instructions

- If you have problems installing FAFSA Express, first read 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 at **800/330-5947**.

Check Your PC's Configuration

Once you have successfully installed FAFSA Express, click **System Information** from the Help menu. Compare this information to the required configuration listed in the appendix. You may need to upgrade your equipment or your system's configuration.

Contact Your System Administrator

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

Use FAFSA Express Online Help

Instead of a paper user's guide, FAFSA Express has online Help. General help on using FAFSA Express is available from the menu bar. For help with data entry fields, press 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 many 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.

CPS/WAN Technical Support

For help with FAFSA Express, call CPS/WAN Technical Support at:

800/330-5947 (TDD/TTY: 800/511-5806)

or e-mail them at:

cpswan@ncs.com

Sources of Assistance for Schools

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

Appendix

Technical Support Information

System Requirements

Hardware and Software Requirements

The following hardware and software components are required for FAFSA Express:

- IBM or fully IBM-compatible PC with a Pentium III (800 MHz) processor 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 card
- Windows 95 keyboard (for example, IBM enhanced 101 or 102 keyboard)
- Microsoft-compatible mouse
- Laser printer capable of printing on standard paper (8 ½" x 11")
- 32-bit operating system (Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x, or Microsoft ME).

Note: Windows 2000 users must have power user permissions.

- SVGA monitor and video card capable of Super Video Graphics Adapter (SVGA) (800 x 600) resolution (small fonts only) or higher. FAFSA Express is designed for SVGA. You may use a higher resolution than SVGA at your own discretion.
- Internet Service Provider (ISP) or connection to the Internet that supports 56K modem connection or higher. A connection to the Internet is necessary to access the Information for Financial Aid Professionals Web site located at **www.ifap.ed.gov**, and the SFAdownload Web site located at **SFAdownload.ed.gov**.
- Microsoft Internet Explorer Version 4.01, Service Pack 2 or higher, or Netscape Navigator Version 4.73 or higher.

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

Local Area Network (LAN) Information

LAN Server Compatibility

FAFSA Express 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

FAFSA Express makes extensive use of Microsoft Access as a database engine. Using one of these network operating systems could corrupt the FAFSA Express database, making your data unaccessible.

Note: Although Windows 2000 is supported, Access 2000 is *not* supported. Irreparable damage will be caused to your database if it is opened in Access 2000 and converted to the new version.

LAN Cautions

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

Examples include:

- Records are locked when an executing function needs stable data for updating or printing.
- Records are locked when exporting.

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 Maximize Throughput for File Sharing

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

Note: Should you encounter problems performing this network installation, contact your organization'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. Paging files on the server should generally be higher than Microsoft recommends. If at all possible, move the paging files from the drive where the FAFSA Express 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 (to delete, create, execute, read, and write) or higher permissions to access both the FAFSA Express 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.

LAN Hardware and Software Recommendations

The following hardware and software components are recommended for running FAFSA Express in a LAN environment:

- IBM or fully IBM-compatible PC with a Pentium III (800 MHz) processor or better.
- 128 MB total memory or more on each workstation.
- 20 GB hard drive and available hard disk space on the file server (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., or Microsoft ME.

Note: Windows 2000 users must have 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.
- Monitor and video card capable of SVGA (800 x 600) resolution (small fonts only).

Note: FAFSA Express was designed for SVGA. You may use a higher resolution than SVGA at your own discretion.

Refer to the previous “System Requirements” section for a complete listing of the general hardware and software required for FAFSA Express.

Installing FAFSA Express on a Network

Follow the instructions in this section for installing the software on a network. In particular,

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

When you perform a workstation installation, the executable file for FAFSA Express (FAFSAExpress10.exe), and all other program files are installed to a workstation’s local hard drive.

The installation modifies all FAFSA Express 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 FAFSA Express 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 FAFSA Express on local area networks.

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

First Time Installation

To Install the Software on a Network for the First Time

1. First, use the Network Server installation option to install only the FAFSA Express database (FAFSA23.mdb) on the file server, not the FAFSA Express program files.
2. Enter the Network server location where you want to install FAFSA Express for Windows, Version 1.0 database files.
3. Type the path or click the **Browse** button.

4. Follow the prompts provided by the **Setup** program.
5. Perform **Full 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**.

The Full option installs all program files, including the executable file (FAFSAExpress10.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 questions about the location of files:

- 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\EDESuite\FAFSA Express 2002-2003**, or some other local designation.

Subsequent Installation

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

1. **Do not** use the Network Server installation option for this version of the software; for example, FAFSA Express Version 1.x. The Network Server installation option is only for users installing FAFSA Express to a network file server for the first time. Choosing this installation option installs an empty FAFSA23.mdb (FAFSA Express database file) on the network file server, overwriting any existing database.
2. Choose the **Network Workstation** installation option.
3. You are then prompted for the location of your FAFSA23.mdb during the FAFSA Express Network Server installation.

4. If this is a subsequent release of the software, the database is updated only once, after the first workstation install is complete. This action occurs when the software is accessed the next time. For example, if you are adding a workstation to your work environment, you perform a **Full** network workstation installation of the current version of FAFSA Express for that workstation. When the first user logs into FAFSA Express, the update runs. Subsequent installations will not update the database again.
5. Follow the prompts provided by the Setup program.

To Install Subsequent and Future Releases

For this version and all other future releases of FAFSA Express, you must do a **Custom** workstation install to ensure the database structure is updated.

Follow the instructions for “To Install the Software on a Network File Server Where the Software is Already Installed.”

Instructions for Organizations with Diskette Folders 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, follow these steps.

1. Create a disk folder for each diskette received. For example, if you receive four diskettes, then create four directories on the file server; if you receive five diskettes, then create five directories on the file server, etc.

In the following four diskettes example, you would create a folder structure like this one on your server.

Example:

\Install

\Install\DISK1

\Install\DISK2

\Install\DISK3

\Install\DISK4

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.

You can now install FAFSA Express from the file server by running **SETUP.exe** from the DISK1 folder on the server instead of carrying the diskettes to each workstation.