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Installation Guide for

# **EDExpress for Windows**

**2002-2003**

**U.S. Department of Education**



**290 H**

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# Introduction

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## Preface

EExpress is a fully integrated software package provided by the U.S. Department of Education (ED) in an easy-to-use Windows format. EExpress offers several modules for processing Title IV financial aid, Direct Loan, and Pell data:

- Application Processing – For entering and editing initial applications and corrections.
- Packaging – For packaging financial aid awards for your students.
- Direct Loan – For originating loans, printing promissory notes, and submitting disbursement records.
- Pell – For processing Federal Pell Grant data.

The first release of EExpress for 2002-2003, version 8.0, contains the Global, Application Processing, and Packaging modules. A subsequent software release will contain the Direct Loan and Pell modules.

See the “What’s New for 2002-2003” pull-down menu item under **Help** for a comprehensive list of product enhancements.

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# EDEExpress Features

## Integrated PC Software Package

EDEExpress is a fully integrated PC software package that allows you to create and manage a database of financial aid records. Cross-module functions include:

- Generating batches for transmission
- Loading files to your database
- Preparing external files for transmission
- Querying student database
- Generating and printing reports
- Printing award letters
- Creating user-defined fields
- Maintaining the Federal School Code database
- Setting passwords and controlling user access
- Maintaining application databases
- Tracking the receipt of student documents
- Using online Help for instructions on all software functions

## Demographic Record

EDEExpress is organized around a feature called the demographic record. Each student in your database has a demographic record that stores the student's address, telephone number, Social Security Number (SSN), and other demographic information.

When you enter or edit a student record, you start from the demographic record screen and access the student's other financial aid records from there; for example, the Free Application for Federal Student Aid (FAFSA) and the Institutional Student Information Record (ISIR).

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## EDconnect

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

To send and receive data, EDEExpress works with the SAIG telecommunication product, EDconnect. EDconnect enables 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**.

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## Using This Installation Guide

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

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

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

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## Help

### Online Help

In addition to desk references, EDEExpress also has online help.

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

See the "Use EDEExpress Online Help" section in this Installation Guide and the "Using Help" topic in the online Help for more information.

## CPS/WAN Technical Support

For questions regarding:

- technical assistance
- software functionality
- ISIR/custom file layouts
- EDconnect functionality

Call CPS/WAN Technical Support at:

**800/330-5947**

**TDD/TYY: 800/511-5806**

or e-mail CPS/WAN Technical Support at:

**cpswan@ncs.com**

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

## Sources of Assistance for Schools

*Sources of Assistance for Schools* is a new document that 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**.

# System Requirements

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## Single-User System Hardware and Software Requirements

The following hardware and software components are required for EDEExpress:

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better
- 128 MB total memory or more
- 20 GB hard drive
- 56 K analog modem K flex or X2 technology
- Dedicated phone line
- 3.5"/1.44 MB high-density floppy disk drive, including 3.5" high-density double-sided diskettes
- 24x CD-ROM drive with sound board
- Windows 95 keyboard (for example, IBM enhanced 101 or 102 keyboard)
- Microsoft compatible mouse
- Laser printer capable of printing on standard paper (8 1/2" x 11")
- 32-bit operating system (Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x 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. EDEExpress is designed in 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](http://www.ifap.ed.gov), and the SFAdownload Web site located at [SFAdownload.ed.gov](http://SFAdownload.ed.gov).
- Microsoft Internet Explorer version 4.01, Service Pack 2 or higher, or Netscape Navigator Version 4.73 or higher.

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## LAN Hardware and Software Recommendations

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

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better.
- 128 MB total memory or more on each workstation.
- 20 GB hard drive available hard disk space on the file server (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:** EDEExpress was designed in 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 EDEExpress.

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## Optional Items to Consider

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

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

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## Estimating Hard Disk Space

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

To find out the approximate total space required, add together the amounts shown for each ED software product and the types of records you are using. You should also take into account other software products installed on your PC. For example, the total space required for 5,000 Direct Loan, ISIR, NSLDS, and Packaging records using all of the software products listed is approximately 79 MB.

Each software product requires the following space:

| <b>Product</b>                                     | <b>Size</b> |
|--|-------------|
| DL Tools for Windows                               | 5 MB        |
| EDconnect for Windows                              | 15 MB       |
| EDExpress for Windows                              | 16 MB       |
| FISAP for Windows                                  | 4 MB        |
| Quality Analysis Tool for Windows with 300 records | 4 MB        |
| Return of Title IV Funds for Windows               | 2 MB        |
| SSCR-32 with 300 records                           | 6 MB        |

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

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

# Installation Instructions

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## Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing EDEExpress.

Instructions are provided for both single-user and network system installation.

Depending on the type of installation you are performing (single-user or network), not all installation files may be required.

Other topics include:

- Downloading paper documentation and software from the SFAdownload Web site located at **SFAdownload.ed.gov**.
- Creating the Install Log
- Changing the database path from the EDEExpress software application
- Uninstalling the software

## Folder Creation

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

**C:\Program Files\EDESuite\EDExpress for Windows 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 may use a different name for the folder.

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

## Program Folder

The default program folder used in EDEExpress is called EDESuite. You may also change this name.

## SFAdownload Web Site

You can download the EDEExpress software, in two formats, from the SFAdownload Web site located at **SFAdownload.ed.gov**. You can download the entire software in one file, called **EDEExpress80.exe**, or you can download the software in separate installments, which can then be copied to a network drive or diskettes. See the “Downloading Software/Paper Documentation” section for more details.

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

**Warning:** 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.

## Installation Steps at a Glance

| Step | Action   | Reference  |
|------|--|--|
| 1    | Download the EDEExpress software, from the SFAdownload Web site located at <b>SFAdownload.ed.gov</b> .       | Read “Downloading Paper Documentation and Software from the SFAdownload Web site” for instructions |
| 2    | Install the software.  | Read “To Install the Software” for instructions.   |
| 3    | Download supporting paper documentation from the SFAdownload Web site located at <b>SFAdownload.ed.gov</b> . | Read “Downloading Paper Documentation from the SFAdownload Web site” for instructions.             |

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## Downloading Paper Documentation and Software from the SFADownload Web Site

You can download the software and the related user documentation from the SFADownload Web site located at **SFADownload.ed.gov**. This site was created to help you access financial aid tools (for example, software and paper documents) for easier and more efficient use of EDEExpress.

### Sample Download Times

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

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

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

### Getting Help

Some organizations restrict their users from downloading from FTP sites.

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

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## Downloading Paper Documentation from the SFADownload Web site

You can download the paper documentation, in either Adobe PDF or Microsoft Word format, from the SFADownload Web site located at **SFADownload.ed.gov**.

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

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

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

### ***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 located at **SFADownload.ed.gov**.
2. Click on **References and Documentation** button on the left-hand side of the screen.
3. Click **EDEExpress 2002-2003** to the left of this description. You are taken to the download site.
4. Scroll down to Service release or Full version documentation
5. 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 As**, choose a location to save the file, and press the **Save** button.

6. 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.
7. Once the paper document has been downloaded on your hard disk, go to the location and double click on the file to open and/or print it.

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## Downloading Software from the Web

You can download the EDEExpress software and the related user documentation from the SFAdownload Web site located at **SFAdownload.ed.gov**. The software is available in two formats. You can download the entire software package in one file (EDEExpress80.exe), or in separate installments, which can be copied to a network drive or diskettes.

### *To Download the Software as One File*

1. Go to the URL field located at the top of your browser's screen and type the SFAdownload Web site located at **SFAdownload.ed.gov**
2. Click on **Software** button on the left-hand side of the screen.
3. Click **EDEExpress 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. 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 **EDEExpress80.exe** to extract the file and install the software.

**Note:** See "To Install the Software" for additional instructions.

### *To Download 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 located at **SFAdownload.ed.gov**.
2. Click on **Software** button on the left-hand side of the screen.

3. Click **EExpress 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**.

**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.

**Note:** See “To Install the Software” for additional instructions.

# Installing the Software on a Single-User System

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## Installation

Downloading the software from the SFAdownload Web site located at **SFAdownload.ed.gov** does not install it. After downloading the software to your hard drive, you must install it. For installing the software on LAN, see "Installing the Software on a Network" section in this guide.

EDEExpress consists of four software modules. They are Application Processing, Packaging, Direct Loan, and Pell.

The first EDEExpress software release, version 8.0, is released with the Global, Application Processing, and Packaging modules. A subsequent software release will contain the Direct Loan and Pell modules.

The first software module listed, Application Processing, automatically installs during the installation process. In addition to application processing functionality, this module contains all of the basic global setup options (for example, security functions) for all modules. You need to complete these setup options prior to processing your Title IV financial aid data with EDEExpress.

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# Installation Options

You can install the software using one of two options:

1. **Full.** Use this option when you are installing EDEExpress for Windows 2002-2003 for the first time and want all available EDEExpress software modules installed.

**Warning for Subsequent Installations:** Use caution when using the Full installation option. The program overwrites, removes, and erases all your existing EDEExpress database (EXPRES23.mdb) and all program files including (EXPRES23.exe), as well as any annotations you may have made to online Help.

2. **Custom.** Use a Custom installation in one of two ways.
  - If you have already installed a full version of EDEExpress, 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, EDEExpress version 8.x. This is the Custom default selection.

## Steps to Install:

1. Be sure all Windows applications, including screen-savers and e-mail notifiers, are closed.
2. If you downloaded the EDEExpress80.exe file from the SFAdownload Web site, go to the location of that downloaded file.
3. Double-click the file to open and/or install it. The file decompresses itself into a temporary folder (usually “c:\temp”) and continues the install from there.
4. EDEExpress 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.

5. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.
6. When the installation program is finished installing the files for EDEExpress, 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:** See “Installing EDEExpress on a Single-User System” and “Installing EDEExpress on a Network” sections of this installation guide for more information.

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## Installing Subsequent Releases

When installing a subsequent release of the software, a process to update the database may be required. This process is required when it is an update to the previous version of the same year/cycle for this product. The update process occurs the first time that the software is initialized after installing the software upgrade. It runs only once, whether on a stand-alone or network-based database. If there are no updates to the database, this update will not occur.

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

# Installing the Software on a Network

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## Installation

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

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

When you perform a workstation installation, the executable file for EDEExpress (EXPRES23.exe) and all other program files are installed to a workstation’s local hard drive.

The installation modifies all EDEExpress 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 EDEExpress 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 EDEExpress 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.

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# First Time Network Installation

## To Install the Software on a Network for the First Time

1. First, use the Network Server installation option to install only the EDEExpress database (EXPRES23.mdb) on the file server, not the EDEExpress program files.
2. Enter the Network server location where you want to install EDEExpress for Windows, version 8.0 database files.

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

3. Follow the prompts provided by the **Setup** program.
4. 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 (EXPRES23.exe) in a local hard drive folder.

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

## Additional Instructions

You are asked two location questions:

- 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\EDExpress for Windows 2002-2003** or some other local designation.

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## Subsequent Network 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, EDEExpress version 8.x. The Network Server installation option is only for users installing EDEExpress to a network file server for the first time. Choosing this installation option installs an empty EXPRES23.mdb (EDEExpress database file) on the network file server, overwriting any existing database.
2. Click on the **Network Workstation** installation option.
3. You are then prompted for the location of your EXPRES23.mdb during the EDEExpress 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 EDEExpress for that workstation. When the first user logs into EDEExpress, 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 EDEExpress, you must do a **Custom** workstation install to ensure the database structure is updated.

Follow the instructions for “Subsequent Network Installation.”

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## Instructions for Schools with Diskette Directories on a Server

### To Install the Software Using Diskettes

If you want to copy the installation diskettes to a file server so you can do workstation installations from the server, follow these steps.

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

In the following 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

\Install\DISK5

\Install\DISK6

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

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

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## LAN Server Compatibility

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

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

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

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

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

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

**Warning:** 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. The database is still designed for Access 97 only.

## LAN Cautions

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

Examples include:

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

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

These functions include:

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

For each Utility function listed above, as well as when you are creating or deleting the User Database, there should be no one else accessing EDEExpress.

## LAN Messages

### *Novell*

These messages notify users when a locking situation occurs:

#### **LAN Error Message**

##### **Condition**

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

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

##### **Record in use - Retry later.**

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

##### **Function in use - Retry later.**

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

### *NT*

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

### **To Maximize Throughput for File Sharing**

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

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

Both the location and the size of the paging files on the NT server are important to the functionality of the software. 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 EDEExpress 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 EDEExpress 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.

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## 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\EExpress for Windows 2002-2003** folder (or the location you specified during the Installation Process).

**Example:**

|            |  |
|------------|--|
| <APP NAME> | EExpress for Windows 2002-2003                           |
| <VERSION>  | 8.X  |
| <TYPE>     | Stand Alone Full   |
| <SUMMARY>  | New release.   |
| <TARGET>   | C:\Program Files\EDESuite\EExpress for Windows 2002-2003 |
| <DATE>     | 02-02-2002   |
| <TIME>     | 08:36:54   |

---

## Changing the EExpress Database Path

You can change the EExpress database path from within the EExpress version 8 software.

**Note to Windows NT Users:** In order to change the EExpress database path, you must have Windows NT administrator access rights.

### ***To Change the Database Path***

1. Open EExpress and select **Help, System Information**.
2. Click the Files Information tab.

3. Click the **Registry** button.
  - A Registry Viewer application displays with a split view.
  - In the left window, you will see a tree-view style window, and in the right window, you see a list-style window with two fields: **Name** and **Value**.

If you do not see the “Year23” label in the left window

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

If you do not see the “Express” label in the left window

- Single left click on the plus sign (+) next to Year23.
  - You will see a label indicating the software’s name.
  - Highlight the name of the software.
4. On the right side of the split screen, find **Database** under the **Name** field, click it and select **Edit, Edit** from the main menu.
    - A **Value** dialog box is displayed with two edit boxes.
    - One box is labeled with **Name** (which is disabled) and the other box is labeled with **Value**.
  5. Enter your new database path in the entry box next to **Value**, including the full path and database name (EXPRES23.mdb) exactly as it appears in Windows Explorer, with upper and lower case letters.
  6. Press **Enter** or click **OK**.
  7. **Exit** the Registry Viewer.
  8. Click **OK** to exit the **System Information** dialog box.
  9. **Exit** the EDEExpress software.

The next time you start EDEExpress, you connect to the new database.

You can confirm that you are connected to the new database by viewing the current database name and location in the status bar at the bottom right-hand corner of the EDEExpress Window.

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## Uninstall

To uninstall EDEExpress, click **Start, Programs** from your Windows Desktop and select EDESuite 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 EDEExpress you have installed (except for the INSTALL.log file).

If EDEExpress is installed on a LAN, the Uninstall utility deletes all EDEExpress 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 EDEExpress.

### *To Uninstall EDEExpress for Windows 2002-2003*

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

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

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

# Getting Started

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## Logging In for the First Time

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

### Startup Information Box

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

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

See the following section, Setting your Assumed School Code, for step-by-step instructions.

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

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

## User ID and Password

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

EDEExpress requires a password for each user for system security.

### ***To Access EDEExpress for the First Time and Establish Your New Password***

1. Type in the default user ID. **SYSADMIN** is the default user ID.
2. Type in the default password. **SYSADMIN** is the default password.
3. Type your **new password** in the New Password text entry box. You must change the default password by typing a new one in this field.
  - Up to eight (8) alphanumeric characters may be entered.
4. Type the **new password** again in the Verify Password field.
  - The Password and Verify Password must be the same.
5. Click **OK** to log in.
6. Use the **new password** the next time you login.

**Note:** The SYSADMIN user ID should be reserved for the systems administrator. All other users should have a unique user ID.

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

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

## Prior Year Data Dialog Box

If you have a prior year version of EDEExpress installed, EDEExpress version 8.x allows you to import most setup features from your previous year’s software, version 7.x, saving you setup time. EDEExpress allows demographic data, most setup information, and most queries to be moved forward from the prior year. Prior Year Direct Loan Disbursement Profiles that are imported will need to be updated and saved successfully before they can be used.

### ***Data That Can Be Moved Forward***

- Demographic Data
- User Data
- Global Setup Options Security User and Groups Setup, Document Tracking, User-Defined Letter Text, System, File Management and User Database
- User-Defined Queries (All Modules)
- Application Processing Setup
- Direct Loan Setup
- Pell Setup
- Packaging Setup and User Formulas

### ***Data That Will Not Be Moved Forward***

- Queries that Reference Modified/Deleted Fields, or Date Parameter
- Packaging Fund Maintenance Fund Amounts
- Estimated Disbursement Dates in Pell Setup

**Note:** Security Groups Setups will not carry forward the options each user has access to.

After logging into EDEExpress version 8.x you are prompted with the **Prior Year Data** dialog box that allows you to import your prior year user-defined queries, setup, and demographic data from EDEExpress version 7.x.

If you do not want to perform this function at this time, but may in the future, click **No** and do not check the **Don't show me this again** box.

If you do not ever want to perform this function, click **No** and check the **Don't show me this again** box.

### ***To Perform the Import of Your Prior Year User-Defined Queries and Setup***

1. Click **Yes** at the **Prior Year Data** dialog box.
2. The Import screen is displayed. In the Import Type field, select Prior Year User-Defined Queries and Setup.
3. Click **OK** at the bottom of the screen.

4. The **Prior Year Move Dialog** screen appears. To import your prior year data, check each type of user-defined query and setup data that you want to import.
5. After selecting the setups to import, click **OK** at the bottom of the screen.
6. A confirmation report is displayed indicating the success of the prior year data import.

### ***To Perform the Import of Your Prior Year Demographic Data***

1. Click **Yes** at the **Prior Year Data** dialog box.
2. The **Import** screen is displayed. In the **Import Type** field, select **Prior Year Demographic Data**.
3. Click **OK** at the bottom of the screen.
4. A confirmation report is displayed indicating the success of the prior year data import.

These imports are also available from the **Import** dialog box under the **Global** tab after you log into EDEExpress.

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## **Setting Your Assumed School Code**

The first time you use EDEExpress you see the warning “Assumed School Is Not Defined.” You must set your Federal School Code in EDEExpress as the assumed school code.

Follow the steps below to set your assumed school code.

### ***To Set Your Assumed School Code***

1. Select Tools, Setup, Global, School.
2. Click **OK** when you get the message, “No Assumed School.”
3. Click the **Retrieve** button to bring up a list of schools.
  - Select your school from the list by using the scroll bars and click **OK**.
  - Your school’s information fills in the institutional fields.

4. Click the **Assumed School** checkbox to define this as your assumed school.

**Note:** If you are a Direct Loan school, use your regular Federal School Code as your global school default code; you should not use your Direct Loan school code. Your Direct Loan school code is only used in **Tools, Setup, Direct Loan, System**.

5. Click **Save** to save the record.
6. Click **OK** twice.

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## Resetting Your User ID and Password

If you have forgotten your password, you can have your EExpress for Windows administrator give you a new one using the User Security function from the menu bar.

### *To Access the User Security Function*

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

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

All EExpress for Windows users, especially EExpress for Windows administrators, should record their user IDs and passwords and keep them in a safe place where they will be remembered.

# Getting Help

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## Basics

There are a number of ways to get help in the installation of EDEExpress:

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

These approaches are described in the succeeding sections.

## Review Installation Instructions

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

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

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

## Become Familiar with Your PC

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

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

## Contact Your System Administrator

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

## Use EDEExpress Online Help

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

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

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

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

- From the **Help** menu, choose a help command.
- Choose the **Help** button available in 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.

The Getting Started help file for 2002-2003. This file contains general information relevant to financial aid processing, but is not directly related to EDEExpress functions. It is available with the first release of EDEExpress and can be accessed from outside EDEExpress. The installation program creates an option for it on the EDESuite menu. You can access this help from the **Start** button by selecting **Programs, EDESuite, Getting Started**.

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# Technical Support

## Contact SFA Technical Support

For SFA technical support, post an e-mail (including your telephone number) with your question to:

**[ed.gov/offices/OSFAP/sfatech/listserv.html](http://ed.gov/offices/OSFAP/sfatech/listserv.html)**

Department staff or the financial aid partner responsible for the system about which you have a question will work on a response.

**Note:** You must subscribe to SFATECH in order to send and receive messages from the list. For information on how to subscribe to SFATECH go to:

**[ed.gov/offices/OSFAP/sfatech/listserv.html#subscribe](http://ed.gov/offices/OSFAP/sfatech/listserv.html#subscribe)**

## CPS/WAN Technical Support

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

**800/330-5947**

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

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

**[cpswan@ncs.com](mailto:cpswan@ncs.com)**

### ***Guidelines for Calling Technical Support***

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

- Your TG ID. (ID starting with TG followed by a 5-digit number starting with 5, 6, or 7.)
- The version of the software you are using (under Help/About EDEExpress for Windows...).

- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, type of memory management being used).
- The exact wording of any error messages you received, as they appeared on your screen.
- A detailed description of the utility or function you were running when the error occurred, and the steps you took to get to that utility or function.
- A description of any resolution steps you took prior to calling.

### ***CPS/WAN Voice Response System***

The CPS/WAN Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to enter the last five digits of your TG ID.

Example:

For TG50001, enter 50001

For TG60001, enter 60001

You are then presented with a menu of options.