

December 2001

RE: EDEExpress for Windows 2002-2003, Version 8.0

Dear EDEExpress Users:

We are pleased to announce the availability of EDEExpress for Windows 2002-2003, Version 8.0. This is the initial software version for the 2002-2003 award cycle. This letter describes general changes to EDEExpress for Windows, as well as enhancements to the following components in this version of the software:

- Global
- Application Processing
- Packaging

These enhancements will make managing your student aid data easier and provide you with more options and greater flexibility.

Note: At the time of this software distribution, the Department's Fiscal Year 2002 Appropriations have not been approved. Therefore, Version 8.0 contains the 2001-2002 Pell Payment Schedule. If the Pell Payment Schedule changes when the Department's Appropriations are approved, EDEExpress will be modified to reflect the new schedule in the next release.

Schools can begin submitting 2002-2003 data to the Central Processing System (CPS) on **January 1, 2002**.

We are including the following information in this letter:

- A list of product enhancements
- The results gathered from EDEExpress benchmark testing
- Reminders on how to back up and optimize your EDEExpress database

How to Get the Software and Documentation

We are distributing EDEExpress for Windows 2002-2003, Version 8.0 via the Internet. You can download the software and the related user documentation from the U.S. Department of Education's Student Financial Assistance Download (SFAdownload) Web site located at **SFAdownload.ed.gov**.

Instructions for downloading EDEExpress for Windows are located in the "Downloading Software/Paper Documentation" chapter of the *EDEExpress for Windows 2002-2003 Installation Guide*.

If you do not have access to the Internet, or you have trouble opening the SFAdownload Web site contact CPS/WAN Technical Support at **800/330-5947** or via e-mail at **CPSWAN@NCS.COM**.

Note: Some organizations restrict their users from downloading from FTP sites. If you have trouble downloading, try again later. If you are still unable to download, contact your technical support staff to ensure that you have full FTP download rights.

If You Have Technical Support Questions

If you have SFA technical support questions and subscribe to SFATECH, you can post a message on the SFATECH listserv. Information about subscribing to the SFATECH listserv can be found at the following URL:

<http://www.ed.gov/offices/OSFAP/SFATECH/listserv.html>

Note: Make sure you include your telephone number in your message. We will research your question and post our response to the listserv so that everyone can benefit from the information.

If you have questions regarding EDEExpress 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 business hours.

CPS/WAN Technical Support

Table of Contents

| | |
|--|----|
| EDEXPRESS FOR WINDOWS, VERSION 8.0 | 5 |
| PRODUCT ENHANCEMENTS | 5 |
| General Changes | 5 |
| Global..... | 5 |
| <i>Sources of Assistance for Schools</i> | 5 |
| <i>Access Passwords</i> | 5 |
| <i>Demographic Record</i> | 6 |
| <i>Document Tracking</i> | 6 |
| <i>Import</i> | 6 |
| <i>Installation</i> | 6 |
| <i>Letters</i> | 7 |
| <i>Multiple Entry</i> | 7 |
| <i>Navigation/Tabs</i> | 7 |
| <i>Prior Year Data</i> | 7 |
| <i>Print</i> | 8 |
| <i>Query</i> | 8 |
| <i>Save Process</i> | 8 |
| <i>Setup</i> | 8 |
| Application Processing | 9 |
| <i>Active Transaction</i> | 9 |
| <i>Export</i> | 9 |
| <i>FAFSA Tab and SAR/ISIR Tab</i> | 9 |
| <i>Hold File</i> | 9 |
| <i>Import Dialog</i> | 9 |
| <i>ISIR</i> | 9 |
| <i>Message Classes</i> | 10 |
| <i>NSLDS</i> | 10 |
| <i>Print Dialog Box</i> | 10 |
| <i>Regenerate</i> | 10 |
| <i>Reject Code</i> | 10 |
| <i>Renewal Application</i> | 11 |
| <i>SAR/ISIR Tab</i> | 11 |
| <i>Verification Worksheet Tab</i> | 11 |
| Packaging..... | 12 |
| <i>Entry</i> | 12 |
| <i>Export</i> | 12 |
| <i>Global</i> | 12 |
| <i>Print</i> | 12 |
| <i>Process</i> | 12 |
| <i>Setup</i> | 13 |

| | |
|---|----|
| EDE AND PACKAGING TECHNICAL REFERENCES | 14 |
| EDEXPRESS SUPPORTS THESE PRINTERS | 14 |
| EDEXPRESS BENCHMARKING | 15 |
| Imports | 15 |
| Reports | 16 |
| REMINDERS | 17 |
| New Hardware Requirements | 17 |
| Back Up Your Database Weekly | 17 |
| Optimize Your Database with Software Utilities | 17 |
| Run the Repair Database Utility | 18 |
| Improve Performance with the Compact Database Utility | 18 |
| Prevent Problems with the Verify Database Utility..... | 18 |

EExpress for Windows, Version 8.0

EExpress consists of four software modules:

- Application Processing
- Packaging
- Direct Loan
- Pell

Version 8.0 installs the Application Processing module, which includes all of the global setup options (for example, the security functions), and the Packaging module. The Direct Loan and Pell modules will be released in future versions of the software.

Version 8.0 does not overwrite your EExpress for Windows, Version 7.2.1 database; it creates a new database.

Product Enhancements

The following product enhancements have been incorporated into EExpress for Windows 2002-2003, Version 8.0.

General Changes

- Year indicators and date ranges have been updated for the 2002-2003 award year.
- Data fields have been modified to reflect the changes in the new 2002-2003 FAFSA.

Global

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. The document is available for downloading at the SFAdownload Web site located at **SFAdownload.ed.gov**.

Access Passwords

- The software no longer requires special access passwords if the system date has been changed to a date in the past. A warning message alerts you that the current system date is earlier than the last date that the software was accessed.

Demographic Record

- Four new record source codes have been added: Import Demo Add, Pell Regular Origination Acknowledgement, Pell Web Origination Acknowledgement, and Pell Year-to-Date.
- The Pell Verification Status field has been renamed to Verification Status Code. The valid values are V (Verified), W (Without Documentation), and Blank.

Document Tracking

- You can now assign documents to student records based on Packaging data elements.
- Document Status has been added as a filter in the Print dialog box for the List-Document Tracking by Student and List-Document Tracking by Document Code reports.
- The Year field and the Document Status column have been removed from Document Tracking Setup to create more space on the document-tracking letter.
- ISIR reject codes are included in Document Tracking Setup and perform the same way as the comment codes.

Import

- The Loan Entrance Interview Completed? field is now called Loan Entrance Interview Date. This field is imported with prior year data and converted to your computer's system date if the field contains a flag, or to blank, if the field contains no value.
- Select Records and Selection Criteria functions have been added to the Prior Year Demographic Data import process.
- You can import last year's setup definitions for App Express and Direct Loan.

Installation

- Starting with the 2002-2003 cycle, when the software is installed, all programs appear on the Start Menu under EDESuite and the cycle year; for example, "EDEXpress 2002-2003." The title of the shortcut on the desktop shows the cycle year first, then product name; for example, "2002-2003 EDEXpress for Windows."

Letters

- You can create an unlimited number of user-defined letters.
- You can assign user-defined letters to a specific module.
- While in a student record, you can print a user-defined letter from any tab, as long as the letter is assigned to the module associated with the tab or is not assigned to a specific module. You can also print letters in batch mode from the Print dialog of the module associated with that letter.
- Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope.

Multiple Entry

- The Multiple Entry Records grid has been expanded to display as many student records as possible.
- The Multiple Entry Edit report now lists the records that are included in the SSN file but cannot be updated because they do not exist in the software.

Navigation/Tabs

- EDExpress for Windows 2002-2003, Version 8.0 highlights the active tab to clearly distinguish between the active tab and the inactive tab.

Prior Year Data

- You can select individual setup profiles, as well as specific student records (where applicable), when using the Prior Year Import feature.
- The following Prior Year Setups can be brought forward:
 - Global: System, Demo Data (by student), User Database, and File Management
 - Apps: System
 - Packaging: System, User Formulas
 - Direct Loan: School, System, Disbursement Profiles, Pnote Printer, and Tolerances
 - Pell: School Default Flag
- To give you easier access to information about the Prior Year Data import, a Help button has been added to the Prior Year Data Import Dialog box. On-line Help now provides a more thorough explanation of the process.
- During the Prior Year Import process, the Entrance Interview Flag is converted to the current system date or left blank if a flag is not present.
- User data setups can be moved to the new database along with each student's corresponding student data.

Print

- All record layouts, with the exception of User-defined Formats, Import User Data and Import Demographic Data, have been removed from the software. All other record layouts are included in the technical references and are available on the SFAdownload Web site located at **SFAdownload@ed.gov**.
- A First Page button and a Last Page button are available when you print to the screen.
- A Print Setup dialog box is available from the File menu and on the Print dialog box.

Query

- You can use a new predefined query to query on the presence of an e-mail address.
- You can compare numeric fields within single records using the new Field-to-Field option.

Save Process

- The final confirmation message no longer displays after the Save process. Instead, a message in the status bar confirms that the Save process has been completed.

Setup

- The Setup menu has been redesigned to allow you to move from option to option without having to go back to the main menu. The Return to Dialog System Setup feature has been defaulted to Yes in order to facilitate this enhancement.
- You can customize Setup options, such as Report File destination (to default to Printer, File or Screen) to make the software more convenient to use.
- All 2002-2003 ED Initiated message classes known at the time of the software release are predefined in Setup.

Application Processing

Active Transaction

- Fields displayed above the grid on the ISIR Review tab have been rearranged to make the transaction activation process more intuitive.
- On-line Help has been expanded to help you better understand the Activate Transaction process.

Export

- The Select Record button is enabled for the Applications-Initial export and the Corrections export.
- All Renewal export options have been removed.

FAFSA Tab and SAR/ISIR Tab

- If the answer to “Legal resident before 1/1/97?” is Yes and/or “Are you male?” is No, the cursor will skip “Legal Residence Date” and “Register for Selective Service.”
- An EFC field labeled EFC (EExpress), which displays directly below the EFC (CPS Compute) field, has been added. This field is populated when the user clicks Process and EFC Calculation.
- You may move between pages 1, 2, and 3 on the FAFSA tab without hitting field edits until the record is saved.

Hold File

- EExpress prints the school code and e-mail addresses of the students listed within the Hold file.

Import Dialog

- An option has been added to the ISIR Data Import dialog to identify records with a Packaging, Direct Loan, or Pell record existing in the database on the import edit report.

ISIR

- EExpress prints the comment code numbers along with the comment text on the comments page of the ISIR.

Message Classes

- The following new message classes for 2002-2003 have been added:

ISIR Data Import:

- YTDNXXOP (ISIR YTD-State/Non Resident)
- YTDRXXOP (ISIR YTD-State Resident)
- FDRFXXOP (Processed FDRs)

Error Import:

- FDRUXXOP (FDR-State Agency-Not on Database)
- The YTDNXXOP, YTDRXXOP, and FDRFXXOP message classes are combined with the ISIR Data import. The FDRU can be combined with the Error import.

NSLDS

- EDEExpress prints all NSLDS information, comment codes, and text on the ISIR.
- On the loan detail, EDEExpress prints the date and amount of the last disbursement as received from NSLDS.
- Discharged loans are flagged with a new type code of T. Defaulted loans followed by discharged loans will be printed on the history page. The maximum is four loans.

Print Dialog Box

- On the List-Processed ISIRs report, the transaction preference box now defaults to "All."
- The Select Records option within Selection Criteria is enabled for the following Application Processing lists: List-Entered Application Records, List-Entered Correction Records, List-Entered Duplicate Requests, and List-Processed ISIRs.

Regenerate

- When you regenerate an application or correction batch in the 2002-2003 software, a new batch number is created and the old batch ID is removed from the batch activity database.

Reject Code

- A new record level (Reject 18) reject code informs a school that an application or renewal application with the same SSN and Name ID is already on file with the CPS.

Renewal Application

- Renewal Application functionality has been removed from EDExpress. The stand-alone Renewal Application software has been discontinued for 2002-2003 as well.

Note: RAD files will no longer be sent to schools, however, schools can use FAA Access on the Web (www.fafsa.ed.gov/FAA/faa.htm) to request that PINs be sent to their students instead of paper renewal applications. CPS will automatically send all schools an electronic file that contains a list of eligible 2002-2003 Renewal FAFSA applicants and indicates which applicants received a PIN mailer versus a paper Renewal FAFSA. You will need to open this file in a text editor, such as Wordpad or Notepad, in order to read the electronic file.

SAR/ISIR Tab

- The Pell Eligibility Flag and the NSLDS Default Indicator display on the SAR/ISIR tab.
- You may move between pages 1, 2, and 3 on the SAR/ISIR tab without hitting field edits until the record is saved.
- A FAA Information screen has been added to the View Menu. It displays processed ISIR values such as Application Receipt Date, EFC, SAR C Flag, Match Flags and Comment Codes for the transaction displayed.

Verification Worksheet Tab

- A 50-character memo field has been added for you to enter notes regarding the verification process. You may also print your notes when you print a Verification Worksheet.

Packaging

Entry

- A Description column for User-Defined Formulas is displayed on the Awards tab.
- The new Pell COA field is displayed in the Needs Analysis section of the Awards tab.
- The Budget Total has been replaced with the Pell COA in the Estimated Pell Award calculation.
- A new field, Parent's State Residency, is part of the Awards tab.
- The State Residency field has been changed to Student's State Residency on the Awards tab.
- Flyover help is available for the fund column on the Awarded Funds grid.

Export

- You can export Packaging Data using the **PKEX03IN** message class.

Global

- The Overaward Indicator field on the entry tab and reports is now titled Remaining Need < 0.
- The Remaining Need < 0 (formerly Overaward Indicator) options E (Exception) and R (Resolved) have been removed from the software.

Print

- A Print Setup option is available on the Print dialog box.
- A new report, List-Funds Forecasting, is available showing the initial offered award funds and the final accepted award funds.
- You are able to exclude all information except the student's SSN, name ID, transaction #, last name, and first name from the List-Packaged Students report.

Process

- The following fields are available via Multiple Entry:
 - Pell COA
 - Low Tuition
 - Parents' State of Legal Residence
- Aid Type R (Grant, Non-need Based) no longer considers EFC when determining remaining need.
- On-line Help explains how to handle mid-year graduates.

Setup

- The Budget setup now includes an option for Pell COA (Cost of Attendance) and is modifiable at the record level. This field is used for calculating the Pell award only.
- The User-Defined Formulas setup allows up to 12 different formulas.

EDE and Packaging Technical References

The *EDE Technical Reference* and the *Packaging Technical Reference* contain technical details such as record layouts and valid field contents. The *Packaging Technical Reference* also contains worksheets and import and export information for interfacing EDEExpress Packaging with an external mainframe system.

Both technical references can be downloaded from the SFAdownload Web site located at **SFAdownload.ed.gov**.

EDEExpress Supports These Printers

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

- HP8150
- HP4
- HP3Si
- HP5SiMX
- HP4000N
- HP4M
- HP4Si
- HP8000N
- HP4MPlus
- HP5Si

EDEExpress Benchmarking

We performed benchmarking tests on the EDEExpress for Windows, Version 8.0 software to determine how it operates in certain operating environments.

Imports

The benchmarking results for EDEExpress import files are as follows.

- These tests were all completed on a Pentium 800 with 128 MB RAM.
- Records were imported into an empty database.
- The Time Elapsed column indicates the measurement of time starting when the user clicks OK in the Import dialog box and the import process begins until the import statistics are displayed.

| Import | Operating System | Benchmarking Volume | Time Elapsed |
|---------------|-------------------------|----------------------------|---------------------|
| ISIR Data | NT 4.0 | 1000 | 36 seconds |
| ISIR Data | Windows 98 | 1000 | 43 seconds |
| ISIR Data | Windows Me | 1000 | 45 seconds |
| ISIR Data | Windows 2000 | 1000 | 35 seconds |

Reports

The benchmarking results for EDEExpress reports and lists are as follows:

- These reports were tested in Windows NT, Windows 98, Windows Me, and Windows 2000 on HP LaserJet 3 si, 4, 4000N, 4M, 4M Plus, 4 si, 5M, 5 si, 5 si MX, and 8000N printers.
- These tests were all completed on a Pentium 800 with 128 MB RAM.
- The Average Time Elapsed column indicates the measurement of time starting when the user clicks OK in the EDEExpress Print dialog box and when the operating system (Windows NT/98/Me/2000) print dialog appears.
- The Benchmarking Volume is the number of records and approximate number of pages that were printed in the test.

| Report | Operating System | Benchmarking Volume | Average Time Elapsed |
|--------------------------|-------------------------|----------------------------|-----------------------------|
| Document Tracking Letter | NT 4.0 | 5 records | 1 second |
| Document Tracking Letter | Windows 98 | 5 records | 1 second |
| Document Tracking Letter | Windows Me | 5 records | 1 second |
| Document Tracking Letter | Windows 2000 | 5 records | 1 second |
| Mailing Labels | NT 4.0 | 25 records | 1 second |
| Mailing Labels | Windows 98 | 25 records | 1 second |
| Mailing Labels | Windows Me | 25 records | 1 second |
| Mailing Labels | Windows 2000 | 25 records | 1 second |
| ISIR | NT 4.0 | 2 records | 1 second |
| ISIR | Windows 98 | 2 records | 1 second |
| ISIR | Windows Me | 2 records | 1 second |
| ISIR | Windows 2000 | 2 records | 1 second |
| Processed ISIRs | NT 4.0 | 25 records | 1 second |
| Processed ISIRs | Windows 98 | 25 records | 1 second |
| Processed ISIRs | Windows Me | 25 records | 1 second |
| Processed ISIRs | Windows 2000 | 25 records | 1 second |
| Award Letters | NT 4.0 | 2 records | 1 second |
| Award Letters | Windows 98 | 2 records | 1 second |
| Award Letters | Windows Me | 2 records | 1 second |
| Award Letters | Windows 2000 | 2 records | 1 second |
| Packaging Setup | NT 4.0 | 26 pages | 1 second |
| Packaging Setup | Windows 98 | 26 pages | 1 second |
| Packaging Setup | Windows Me | 26 pages | 1 second |
| Packaging Setup | Windows 2000 | 26 pages | 1 second |

Reminders

New Hardware Requirements

The Department of Education produced a document titled "Analyzing your SFA Computing Needs to be more Productive and Save Money" which is available on IFAP at the following URL:

<http://198.77.163.160/eannouncements/attachments/1129MinPCneeds.pdf>

We suggest you read through this document to get a better idea of your school's computing needs and what your processing requirements may be.

Back Up Your Database Weekly

You should back up your EDEExpress for Windows database file (EXPRESS23.MDB) regularly so you do not lose your data. We recommend that you back up your files at least once a week. 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. Be sure to test your backup software to verify that it can reliably restore your backups.

Optimize Your Database with Software Utilities

EDEExpress for Windows contains utilities that allow you to optimize your database to prevent 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 repairing, compacting, and verifying, see section "Run the Repair Database Utility."

Run the Repair Database Utility

The Repair Database utility resolves inconsistencies in record 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 for Windows may not detect database corruption, so if your system functions unpredictably (for example, you start getting database error messages, even something as simple as a missing flag on a record), use the Repair Database utility. Running this utility once a week 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 with the Compact Database Utility

The Compact Database utility improves the performance of EDEExpress for Windows by optimizing the database (EXPRES23.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 are removed, only that they are organized and stored more efficiently.

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 with 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.