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Installation Guide for

# Quality Assurance Program for Windows

1998-1999

U.S. Department of Education



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# Introduction

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## Preface

The 1998-99 Quality Assurance Program for Windows software is designed to calculate data Readings you will use as a basis for quality improvements at your institution. The software measures three types of Readings:

- **Summary Readings** consist of overpayments and underpayments for Pell Grants, overpayments for Campus-Based aid, overcertifications and overpayments for subsidized FFELP Loans, and overawards and overpayments for subsidized Direct Loans as well as any Pell Grants and SEOG's overpayments for graduate students.
- **Institutional Readings** consist of all types of readings on data over which an institution has control, ranging from disbursements made in the absence of Satisfactory Academic Progress to errors made in the calculation or disbursement of Title IV aid. There are three subsections for institutional readings: Pell Grants, Campus-Based Aid, and Subsidized FFELP/Direct Loans.
- **Student Application Readings** are made on data reported by the student or family, such as, the reporting of income, household size, and number of persons in college. Quality Assurance Program for Windows reports Student Application Readings for Pell Grants and Subsidized FFELP/Direct Loans.

The software also allows you to examine subsets of your sample, which you then can use to analyze your student population.

## Using This Installation Guide

Use the instructions contained in this Installation Guide to install the software on your computer or local area network (LAN). If you are installing the 1998-99 software for the first time, choose the **Full** installation option for this release of Quality Assurance Program for Windows.

This guide also provides you with hardware and software requirements, LAN compatibility issues, and how to get help.

## Help

Instead of a paper user's guide, Quality Assurance Program for Windows 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.

New for 1998-1999! Also provided with this release of Quality Assurance Program for Windows is a desk reference that describes the various menu items, gives helpful hints, and lists customer service information.

For questions regarding:

- technical assistance
- import/export problems
- ISIR/custom file layouts
- software functionality

call CPS Customer Service at:

**800/330-5947**

For all other program or policy questions, call the Department of Education at:

**202/260-4788**

See the topic *CPS Customer Service* in the online help and this Installation Guide for more information.

# System Requirements

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## Hardware and Software Requirements

The following hardware and software are required for Quality Assurance Program for Windows:

- IBM or fully IBM-compatible PC with a 486DX2 66MHz processor or better
- 16 MB total memory or more
- 300 MB of available hard disk space (depending on the functions you use and how many records you store in your database)
- 3.5" high-density floppy disk drive
- Microsoft compatible mouse
- Hewlett Packard (HP) LaserJet compatible printer and printer driver
- MS-DOS version 6.2 or higher (unless using Windows 95 or Windows NT)
- Microsoft Windows version 3.1, Microsoft Windows for Workgroups 3.11, Microsoft Windows 95, or Microsoft Windows NT 3.51 or above
- Consider a quad-speed (or better) CD-ROM drive for software tutorials and other future software distributions
- Consider a tape backup system to store your data
- Monitor and video card capable of standard VGA (800 x 600) resolution (small fonts only). Quality Assurance Program for Windows was designed in super VGA. You may use a higher resolution than super VGA at your own discretion.

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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.

EDconnect, and NET\*CONNECT are software products provided by the Title IV WAN.

**The maximum number of records that you will have on the Quality Assurance Program for Windows database is 300. The total space required for the software and 300 records is approximately 2 MB.**

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 Quality Assurance Program for Windows (with 300 records) and 5,000 Direct Loan, ISIR, NSLDS, and Packaging records using all of the software products listed is approximately 68 MB.

**Each software product requires the following space:**

Product	Size
Quality Assurance Program for Windows with 300 records	2 MB
SSCR-32 with 300 records	6 MB
EDconnect/NET*CONNECT for Windows	15 MB
EDExpress for Windows	16 MB
OPEnet	2 MB

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

Record	Size
Direct Loan	6 MB
ISIR	15 MB
NSLDS	4 MB
Packaging	2 MB

# Local Area Network (LAN) Server Compatibility

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## LAN Server Compatibility

Quality Assurance Program for Windows can be used as stand-alone or multi-user software. It can be run on the following network operating systems:

- Novell Netware 3.x and 4.x
- Microsoft Windows NT Server
- Microsoft LAN Manager

You should not run the software on peer-to-peer networks such as Artisoft LANtastic, Novell's Personal Netware, and Microsoft Windows for Workgroups. (Note: Microsoft Windows for Workgroups 3.11 can be used as a desktop operating system, but not as a network operating system.)

According to the Microsoft Knowledge Base, some anomalies have been known to occur when using Microsoft Access with the following networks: DEC Pathworks, IBM Lan Server, and Sun PC-NFS. Since Quality Assurance Program for Windows makes extensive use of Microsoft Access as a database engine, do not use these network operating systems with Quality Assurance Program for Windows.

## LAN Cautions

When multiple users are concurrently updating databases in the Quality Assurance Program for Windows 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.
- 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.

## LAN Messages

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, the user is 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, the user is 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, the user is returned to the menu bar.

## Additional LAN Instructions

1. If you are running Quality Assurance Program for Windows from a Novell file server, the NET.CFG file on all workstations should contain the following statement:

**File Handles = 120**

2. From the Netware server Console prompt, you should enter the following commands:

**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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## LAN Hardware and Software Recommendations

- IBM or fully IBM-compatible PC with a 486DX2 66MHz processor or better
- 16 MB total memory or more on each workstation
- 300 MB available hard disk space on the file server (depending on the number of records you will store in your database)
- MS-DOS version 6.2 or higher (unless using Windows 95 or Windows NT)
- Desktop Operating System: Microsoft Windows versions 3.1 or 3.11, Microsoft Windows for Workgroups 3.11, Microsoft Windows 95, or Microsoft Windows NT 3.51 or above
- Network Operating System: Novell NetWare version 3.12 or higher, Microsoft Windows NT 3.51 or above, or Microsoft LAN Manager
- 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 standard VGA (800 x 600) resolution. Quality Assurance Program for Windows was designed in super VGA. You may use a higher resolution than super VGA at your own discretion.

**Note:** For questions regarding any of the listed hardware or software requirements, please contact CPS Customer Service at 800/330-5947.



# Installation Instructions

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## Installation Process

This section of the Installation Guide provides you with step-by-step instructions for installing Quality Assurance Program for Windows. Instructions are provided for both network and stand-alone system installation.

*Depending on the type of install you are performing (network or stand-alone), all installation diskettes may not be required.*

Other topics include:

- Install Log creation
- CONFIG.SYS and NET.CFG statements
- Uninstall instructions
- How to change your Swap File settings

Follow the prompts the software provides you when installing Quality Assurance Program for Windows.

### Directory Creation

The installation process automatically creates the directory WINQAP9 for Quality Assurance Program for Windows files on your local hard disk.

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 want to use a different name for the directory.

If you are performing a network server installation, be sure to install to a LAN drive and not to a local drive.

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# Installing Quality Assurance Program for Windows on a Network

When you perform a workstation installation, the executable file for Quality Assurance Program for Windows (WINQAP9.EXE) installs to a workstation's 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 Quality Assurance Program for Windows uses the combined resources of the workstation and the file server instead of those of the file server alone.

Follow the instructions below to install Quality Assurance Program for Windows on local area networks.

## Installation Instructions

1. **First, use the Network Server installation option to install this version of the software.** This option installs only the QA database (WINQAP9.MDB) on the file server, not the QA program files.
2. **Then, do Full workstation installations on all workstations for this version of the software.** Choose the **Network Workstation** installation option, then select **Full**. The **Full** option installs the executable file (WINQAP9.EXE) in a local hard drive directory. It also establishes the workstation's ODBC (open database connectivity) connection to the QA database. The **Workstation** installation option prompts you for the location of the database installed during the Network Server installation (step 1).

If you have questions, call **CPS Customer Service** at **800/330-5947**.

## Additional Instructions

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 directory for each diskette received. If you receive three diskettes, then create three directories on the file server; if you receive five diskettes, then create five directories on the file server; if you receive seven diskettes, then create seven directories on the file server, etc. In the preceding five diskette example, you would create a directory structure like this one on your server.

\Install

\Install\DISK1

\Install\DISK2

\Install\DISK3

\Install\DISK4

\Install\DISK5

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

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

If you have questions, call **CPS Customer Service** at **800/330-5947**.

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# Installing Quality Assurance Program for Windows on a Stand-Alone System

Be sure that all Windows applications, including screen-savers, e-mail notifiers, etc. have been closed before you proceed with this setup. Microsoft ODBC (open database connectivity) Setup will fail if any of these applications are still running. You can install Quality Assurance Program for Windows using one of three options:

- **Full.** Use this option when you are installing Quality Assurance Program for Windows for the first time. **It overwrites all existing 1998-1999 Quality Assurance Program database and program files (\*.EXE files).**

**Warning: If you choose the Full Install option, the program will remove/erase ALL your existing QA database and program files (\*.EXE files).**

- **Upgrade.** Use this option only if you have already installed a full version of Quality Assurance Program for Windows for 1998-99. This option updates only program files (\*.EXE files) and leaves your current databases intact.
- **Custom.** If you have already installed a full version of Quality Assurance Program for Windows for this processing cycle, you can use this option to replace executable program files, ODBC files, HELP, and/or the QA database. This option leaves all other system settings intact.

**Note:** If you have forgotten your password, to reset the **QAPADMIN** user ID and password do a **Custom** installation selecting the **Update Database** component only. (This action will not affect your databases.) A pop up box with the option to reset **QAPADMIN** will appear. An **Upgrade** installation will also give you the option to reset **QAPADMIN**.

## Windows 3.1 or 3.11

1. Turn on your computer and start Microsoft Windows.
2. Insert Diskette #1 in the A: drive.
3. Select **File** from the Windows Program Manager menu bar.
4. Select **Run** from the File pull-down menu.
5. Type **a:setup** at the command line and click **OK**. The software is installed to the default directory C:\WINQAP9 unless you choose another location.
6. Insert diskettes in numerical order and click **OK** when prompted.

Quality Assurance Program for Windows asks you a series of questions during the installation. Each question has a default answer. If the default is correct, click **Next** in response to each question. If not, type the correct answer and click **Next**. When it is finished installing the files for Quality Assurance Program for Windows, the

installation program adds a program group and icons to your Program Manager window.

## Windows 95 or Windows NT

1. Turn on your computer and start Microsoft Windows.
2. Insert Diskette #1 in the A: drive.
3. Select **Start** from the Task bar.
4. Select **Run** from the Start pop-up menu.
5. Type **a:setup** at the command line and click **OK**. The software is installed to the default directory C:\WINQAP9 unless you choose another location.
6. Insert diskettes in numerical order and click **OK** when prompted.

Quality Assurance Program for Windows asks you a series of questions during the installation. Each question has a default answer. If the default is correct, click **Next** in response to each question. If not, type the correct answer and click **Next**.

When it is finished installing the files for Quality Assurance Program for Windows, the installation program updates your Start menu. It will not, however, create desktop icons/shortcuts or update them if they have already been created.

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## Install Log

Each time an installation is performed, an Install Log is created. The information that will be tracked is the product and version number, type and nature of the install, drive/directory, date, and time of install. This file is named INSTALL.LOG and is located in your C:\WINQAP9 directory.

**Example:**

<APP NAME>    **Quality Assurance Program for Windows**

<VERSION>    **3.x**

<TYPE> **FULL: Install everything.**

<SUMMARY>    **New release for '98-99 cycle**

<TARGET>     **C:\WINQAP9**

<DATE>        **03-19-99**

<TIME> **08-36-54**

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## CONFIG.SYS and NET.CFG

The software can modify your CONFIG.SYS file automatically. If you do not want Quality Assurance Program for Windows to modify this file, select the appropriate option and click **Next**.

To modify your CONFIG.SYS file independently at a later time, add these statements to the file:

**Files = 120**                    (or greater than 120)

**Buffers = 32**                    (or greater than 32)

If you are running Quality Assurance Program for Windows on a Novell Server, then your NET.CFG file should contain the following statement:

**File Handles = 120**            (or greater than 120)

### ***For Windows 3.1 and 3.11 Users***

For Windows 3.1 or 3.11 users, Quality Assurance Program for Windows will install the VSHARE.386 file if the file is not present. The VSHARE.386 file will be set up in the SYSTEM.INI (386 Enhanced) file's section.

<p><b>Note: Remember to reboot your computer when done.</b></p>
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## Uninstall

After you have installed Quality Assurance Program for Windows, you will see an Icon for the Uninstall utility. By double-clicking on **Uninstall**, the utility deletes all icons, the software's program group, all executable files, all DLLs, and the entire database for the version of Quality Assurance Program for Windows you have installed. If Quality Assurance Program for Windows is installed on a LAN, the Uninstall utility will only delete the Quality Assurance Program for Windows icons.

To uninstall Quality Assurance Program for Windows:

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**.

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## Changing Your Swap File Settings

Windows 3.1 or 3.11 uses swap files to improve the way your computer uses memory while you are in Windows, which in turn improves system performance. Swap files can be temporary or permanent. For maximum performance from Quality Assurance Program for Windows, your swap file setting for Windows should be set for a *permanent* swap file and use 32-bit disk access (also 32-bit file access if running Windows for Workgroups 3.11). For simplicity, users can also select a *temporary* swap file. Before you install Quality Assurance Program for Windows, you should review your swap file setting.

**To change your swap file setting to Permanent from the Windows Program Manager:**

1. Open the **Main** group or the group where your Control Panel icon is located.
2. Double-click the **Control Panel** icon.
3. Double-click the **386 Enhanced** icon.
4. Click the **Virtual Memory** button. Look at *Type* to see if your swap file is currently set to *Permanent (using BIOS)* or *Temporary (using MS-DOS)*.
5. If the setting is *Permanent (using BIOS)* and 32-bit disk access (also 32-bit file access if using Windows for Workgroups) is checked, click **OK** until you return to the Program Manager window. You are ready to install Quality Assurance Program for Windows.
6. If the setting is *Temporary (using MS-DOS)*, continue with step 7.
7. Click the **Change** button.
8. Click the **down arrow** in the box next to *Type* and select **Permanent**.
9. Check the box next to 32-bit disk access (also check 32-bit file access if using Windows for Workgroups).

10. Click **OK**.
11. Restart Windows and proceed with installing Quality Assurance Program for Windows.

**To change your swap file setting to Temporary from the Windows Program Manager:**

1. Open the **Main** group or the group where your Control Panel icon is located.
2. Double-click the **Control Panel** icon.
3. Double-click the **386 Enhanced** icon.
4. Click the **Virtual Memory** button. Look at *Type* to see if your swap file is currently set to *Permanent (using BIOS)* or *Temporary (using MS-DOS)*.
5. If the setting is *Temporary (using MS-DOS)*, click **OK** until you return to the Program Manager window. You are ready to install Quality Assurance Program for Windows.
6. If the setting is *Permanent (using BIOS)*, continue with step 7 below.
7. Click the **Change** button.
8. Click the **down arrow** in the box next to *Type* and select **Temporary**.
9. Click **OK**.
10. Restart Windows and proceed with installing Quality Assurance Program for Windows.

# Getting Started

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## Logging In for the First Time

Each time you start Quality Assurance Program for Windows, you must enter a valid user ID and password. Quality Assurance Program for Windows requires user IDs and passwords for system security.

The first time you use Quality Assurance Program for Windows, enter **QAPADMIN** for both your user ID and password. QAPADMIN is the user ID and password included with Quality Assurance Program for Windows. You will then be prompted to enter a new user ID and password.

Follow these steps to log in to Quality Assurance Program for Windows for the first time.

### To log in and establish your new user ID and password:

1. The first time you use Quality Assurance Program for Windows, enter **QAPADMIN** for both your user ID and password.
2. Press **Enter** or click **OK**.  
You will be prompted to enter a new User ID and Password.
3. Press **Enter** or click **OK**.
4. On the next screen, enter a New User ID, Password, and Verify password.
  - Up to eight (8) alphanumeric characters may be entered.
  - The Password and Verify Password must be the same.
5. Press **Enter** or click **OK**.
6. Quality Assurance Program for Windows will indicate that the updates have been saved.
7. Press **Enter** or click **OK**.

After you enter your user ID and password, a message box displays any messages, warnings, or errors.

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## Getting Help

There are a number of ways to get help:

- Reviewing installation instructions
- Becoming familiar with your PC
- Contacting your system administrator
- Using Online Help
- Calling CPS Customer Service

These approaches are described below.

### Review Installation Instructions

Review the installation instructions again. See if you perhaps left out a step. Try the installation process again.

### Become Familiar with Your PC

If you have completed the Quality Assurance Program for Windows installation, click System Information from the Help menu.

Compare this information to the required configurations listed at the beginning of this section. You may need to upgrade your equipment or change your files.

### Contact Your System Administrator

Your institution 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.

### Quality Assurance Program for Windows Online Help

Using Help is simple. You can get 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 Customer Service

If you need technical support, call CPS Customer Service at:

**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 at:

**CPS@NCS.COM**

The CPS Voice Response System has phone routing set up to assist you in designated areas. When you call 800/330-5947, you will be asked to enter the last 5 digits of your Title IV WAN User ID.

Example:

For **TG50001**, enter **50001**

For **TG60001**, enter **60001**

You will then be presented with a menu of options.

Choose the area appropriate to the information or assistance you need:

Menu Option	Description
1	<b>CPS Automated Customer Service Center</b> is an automated system through which you can check the status on batches and applications, request faxable materials and information, and obtain other needed data, such as reject, comment, and assumption code definitions.
2	<b>Application Processing</b> – Representatives assist you with installation and software questions.
3	<b>Direct Loan</b> – Representatives assist you with installation and software processing issues. Representatives also assist you with questions on the Direct Loan Technical Reference.
4	<b>Pell Payment</b> – Representatives assist you with installation and software questions.
5	<b>SSCR</b> – Representatives assist you with installation and software questions.
6	<b>Quality Assurance Program for Windows</b> – Representatives assist you with installation, software, and program questions.
7	<b>Packaging</b> – Representatives assist you with installation and software questions.
8	<b>FISAP for Windows</b> – Representatives assist you with installation, software questions, and technical issues.

When you call CPS Customer Service, you should be at your computer and prepared to provide the following information, upon request:

- The version of EDEExpress you are using (under Help/About ...).
- 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, etc.).
- The exact wording of any error messages you have received, as they appeared on your screen.
- A detailed description of the utility or function you were running when the error occurred, what module of the software you were working in (Application Processing, Direct Loan, Packaging, or Pell), and the steps you took to get to that utility or function.
- A description of any resolution steps you took prior to calling.