
Installation Guide for

Quality Analysis Tool for Windows

2000-2001

U.S. Department of Education



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Introduction

Preface

Quality Analysis Tool for Windows (QA Tool) is a new and significantly different program that replaces the Quality Assurance Program for Windows. We took what we learned from the Quality Assurance Program for Windows and what its users told us and created a streamlined software product for analyzing 1999-2000 ISIR data.

The most important difference is that the focus of the software has shifted to verification.

- QA Tool analyzes and reports data changes to the EFC and corrections to fields that help you improve your verification process, rather than analyzing awards.
- As a result, your verification process is improved and the financial aid process is easier for students.

Specific Differences

Listed below are some specific ways 2000-2001 Quality Analysis Tool for Windows differs from Quality Assurance Program for Windows.

Data Comparison

QA Tool uses *initial* and *paid on* ISIR transactions to analyze your sample. It displays the differences between the data elements in the two transactions side by side for comparison. You can view all fields or a group of selected fields. Demographic data also displays.

Data Entry and Multiple Entry

QA Tool has no manual entry or multiple entry function for student data; it uses only ISIR data that you import. Only the School Verification flags can be updated.

ENAS

QA Tool does not support ENAS functions.

Import

This function is important because you import the ISIR data from your 1999-2000 Quality Assurance Program for Windows database (if you used Quality Assurance Program for Windows), your 1999-2000 EDEExpress database (if you used EDEExpress for Windows, Version 6.x), or an ASCII file in ISIR format. The record layout is similar to one used for Quality Assurance Program for Windows, Versions 4.x.

Loans

QA Tool does not support Pell, campus-based, or multiple loans.

Non-ISIR Data

QA Tool does not support non-ISIR data, such as awards, disbursements, resources, documents, or enrollment.

Print

You can print a variety of new reports and other useful information, such as record layouts for ISIR, Full Data, and User Data exports, a list of queries, and custom reports.

Readings

QA Tool does not calculate readings.

Tabs

The software has only two tabs: Transaction Comparison and User Database. The various tabs along the lower portion of the screen in Quality Assurance Program for Windows, such as Summary, Readings, and Notepad, were removed.

Features

The features available in the former Quality Assurance Program for Windows software product that have not changed and are present in QA Tools are:

- Custom Reports
- Export
- File Management
- Import
- Print
- Query
- User Database

EDconn32

Important steps in processing financial aid information are sending and receiving data over the SAIG. To accomplish these steps, QA Tool works with the SAIG telecommunication product, EDconn32. EDconn32 enables you to send and receive data over the SAIG.

See the *Student Aid Internet Gateway EDconnect Desk Reference* for EDconn32 software instructions.

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 hardware and software requirements, instructions on how to estimate the amount of hard disk space you need on each computer, LAN compatibility issues, and information on how to get help.

See the “Installation Instructions” section in this guide for additional installation instructions.

Help

Instead of a paper user's guide, QA Tool 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.

For questions regarding:

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

call CPS Customer Service at:

800/330-5947

TDD/TYY: 800/511-5806

For all other program or policy questions, call the following contacts at the Performance and Accountability Improvement Branch:

<u>Contact</u>	<u>Phone</u>	<u>E-mail</u>
Holly Langer-Evans	617/223-9603	holly_langer-evans@ed.gov
Francine Reeves	404/562-6289	francine_reeves@ed.gov
Michael Cagle	206/287-1882	michael_cagle@ed.gov

See the topic "CPS Customer Service" in the online Help and this installation guide for more information.

System Requirements

Hardware and Software Requirements

The following hardware and software components are required for QA Tool:

- IBM or fully IBM-compatible PC with a Pentium 200 MHz processor or better.
- 64 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).
- 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.
- Windows 95 keyboard (for example, IBM Enhanced 101 or 102 Keyboard).
- Microsoft compatible mouse.
- Laser printer capable of printing on standard paper (8 ½" x 11").
- 32-bit operating system (Microsoft Windows 95, Microsoft Windows 98, Microsoft Windows 2000, or Microsoft Windows NT 4.0).

- Monitor and video card capable of Super Video Graphics Adapter (SVGA) (800 x 600) resolution (small fonts only). QA Tool 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. A connection to the Internet is necessary to access the Information for Financial Aid Professionals Web site, www.ifap.ed.gov, and the SFAdownload Web site, <http://SFAdownload.ed.gov>.

Optional Items to Consider

The following items are recommended as additional tools for managing your financial aid data:

- 12X CD-ROM drive with sound board for other future software distributions
- 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

Estimating Hard Disk Space

The following information gives you an estimate of how much hard disk space is required for each Department of Education (ED) student financial aid 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 76 MB.

Each software product requires the following space:

Product	Size
EDconn32 for Windows	15 MB
EDExpress for Windows	16 MB
FISAP for Windows	4 MB
Quality Analysis Tool for Windows with 300 records	4 MB
Renewal Applications for Windows	2 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:

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

Local Area Network (LAN) Server Compatibility

LAN Server Compatibility

QA Tool 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
- Microsoft Window 2000 Server

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

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

Note: Although Windows 2000 is supported, Access 2000 is NOT supported. Irreparable damage will be caused to your database if it is opened in Access 2000 and converted to the new version. The database is still designated for Access 97 only.

LAN Cautions

When multiple users are concurrently updating databases in the QA Tool 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

During each above Utility function there should be no one else accessing QA Tool.

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:

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.

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 be generally higher than Microsoft recommends. If at all possible, move the paging files from the drive where the QA Tool 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 directory path is case sensitive.

The financial aid group must own the folder, as well as all files in the database directory, on your NT server.

All users must have Change (to delete, create, execute, read, and write) or higher permissions to access both the QA Tool database and downloaded folder, as well as the files in each of those folders.

Additional LAN Instructions

If you are using a NetWare product, enter the following command at the NetWare Server Console prompt:

Set Maximum Record Locks Per Connection = 10000

This line should also be added to the AUTOEXEC.ncf file on the NetWare server.

LAN Hardware and Software Recommendations

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

- IBM or fully IBM-compatible PC with a Pentium 200 MHz processor or better.
- 64 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).
- *Desktop Operating System:* Microsoft Windows 95, Microsoft Windows 98, Microsoft Windows 2000, or Microsoft Windows NT 4.x.
- *Network Operating System:* Novell NetWare versions 3.12 or above or 4.11 or above, 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). QA Tool 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 QA Tool.

Note: For questions regarding any of the above listed hardware or software requirements, contact CPS Customer Service at 800/330-5947 or via e-mail at cps@ncs.com.

Installation Instructions

Installation Process

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

Instructions are provided for both single-user and network system installation. Depending on the type of install you are performing (single-user or network), not all installation diskettes/diskette files may be required.

Other topics include:

- Downloading software and documentation from the SFAdownload Web site
- Creating the Install Log
- Changing the database path from the QA Tool software application
- Uninstalling the software

Directory Creation

The installation process automatically creates the directory:

C:\Program Files\EDESuite\Quality Analysis Tool 2000-2001

for QA Tool 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 use a different name for the directory.

Caution: If you change the directory location and name, you must remember and use them with each QA Tool software update you receive.

Program Folder

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

SFAdownload

QA Tool is available on the SFAdownload Web site in two formats. You can download the entire software in one file, QATool10.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.

Note: If you do not have access to the Internet to download the software or if you have trouble opening the SFAdownload Web site, contact Title IV WAN Customer Service at 800/615-1189, or via e-mail at T4WAN@ncs.com.

Once the software download is complete, be sure all Windows applications, including screen-savers, e-mail notifiers, are closed. Then follow the prompts provided by the software when installing QA Tool.

Installation Steps at a Glance

Step	Action	Reference
1	Download the software from the SFAdownload.ed.gov Web site.	Read “Downloading Software and Paper Documentation from the SFAdownload Web site” for instructions or request diskettes from Title IV WAN Customer Service at 800/615-1189.
2	Install the software.	Read “To Install the Software” for instructions.
3	Download all supporting paper documentation from the SFAdownload.ed.gov Web site.	Read “Downloading Paper Documentation from the Web” for instructions or request documents from Title IV WAN Customer Service at 800/615-1189.

Downloading Software and Paper Documentation from the SFAdownload Web Site

You can download both software and paper documents from the Internet using the SFAdownload Web site, <http://SFAdownload.ed.gov>. The SFAdownload Web site was created to help you access financial aid tools (for example, software and paper documents) for easier and more efficient use of QA Tool.

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 kb modem is recommended.

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

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

Getting Help

Some organizations restrict their users from downloading from FTP sites. If you have 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. If you do not have access to the Internet or have trouble opening the SFAdownload Web site, contact Title IV WAN Customer Service at 800/615-1189.

Downloading Software from the Web

QA Tool and its related documentation are distributed via the Internet using the Student Financial Assistance (SFA) Download Web site, <http://SFAdownload.ed.gov>. It is available on the SFAdownload Web site in two formats. You can download the entire software in one file (QATool10.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 address:
<http://SFAdownload.ed.gov>.
2. Follow the instructions provided and click the **Continue** button. You are taken to a "Privacy on Our Web Sites" Web page.
3. Click on any of the links (or scroll down) to read information about Non-personal Information, Information from E-mails, Information collected from interactive forms, or Privacy of other records.
4. Click the **Continue** button to access the Web site containing the software you want to download. A brief description of the software is provided.
5. Click **2000-2001 Quality Analysis Tool for Windows** to the left of this description. You are taken to the downloading site. Title IV WAN Customer Service provides technical support via phone and e-mail.
6. Click the **Full Download** link to download the program that allows you to do the full installment. A **Save As...** dialog box appears.
7. Choose the location on your hard drive to save the file, then click the **Save** button. The length of time it takes to download the software depends largely on the speed of your Internet connection.
8. Once the file is downloaded to your hard drive, go to that location and double click **QATool10.exe** to extract the file and install the software.

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 address:
http://SFAdownload.ed.gov.
2. Follow the instructions provided and click the **Continue** button. You are taken to a "Privacy on Our Web Sites" Web page.
3. Click any of the links (or scroll down) to read information about Non-personal Information, Information from E-mails, Information collected from interactive forms, or Privacy of other records.
4. Click the **Continue** button to access the Web site containing the software you want to download. A brief description of the software is provided.
5. Click **2000-2001 Quality Analysis Tool for Windows** to the left of this description. You are taken to the downloading site. Title IV WAN Customer Service provides technical support via phone and e-mail.
6. 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.
7. Click **Disk 2**. When the **Save As...** dialog box appears again, save **Disk 2** to the same location as you saved Disk 1.
8. Click on each succeeding disk until they are all saved to the same location on your hard disk.
9. Once the software disk files are downloaded to your hard disk, go to that location, double-click on **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.

See "To Install the Software" for additional instructions.

To Install the Software

Downloading the software from the SFAdownload Web site does not install it. After downloading the software to your network or hard drive, you must install it.

Be sure all Windows applications, including screen-savers, e-mail notifiers, are closed.

1. If you downloaded the QATool10.exe file from the SFAdownload Web site, go to the location of that downloaded file. If you received installation diskettes in the mail from the U.S. Department of Education, see the “Installation Steps (Diskette)” section.
2. Double-click on the file to open and/or install it. The file decompresses into a temporary directory (usually "c:\temp") and continues the installation process.
3. QA Tool asks 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.
 - 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 directory where the software is located.

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.

4. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.
5. You must shut down and restart your computer for the installation process to be complete.

See “Installing QA Tool on a Single-User System” and “Installing QA Tool on a Network” for more information.

Downloading Paper Documentation from the Web

You can download the paper documentation from the Internet in either Adobe PDF or Microsoft Word format. The following types of paper documentation for QA Tool are available:

- Installation Guides
- Cover Letters

Each document has the date they were 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 address:
<http://SFAdownload.ed.gov>
2. Follow the instructions provided and click the **Continue** button.
You are taken to a "Privacy on Our Web Sites" Web page.
3. Click on any of the links (or scroll down) to read information about:
 - Non-personal Information,
 - Information from E-mails,
 - Information collected from interactive forms, or
 - Privacy of other records.
4. Click the **Continue** button to access the Web site containing the document(s) you want to download.
A brief description of the documentation's software is provided.
5. Click **2000-2001 Quality Analysis Tool for Windows** to the left of this description. You are taken to the download site.

Title IV WAN Customer Service provides technical support via phone and e-mail.

6. 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 it to disk**, choose a location to save the file and press the **Save** button.

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

Installing QA Tool on a Single-User System

ED can mail diskettes to schools who do not have access to the Internet or have trouble opening the SFAdownload Web site to download QA Tool. Call Title IV WAN Customer Service to request diskettes.

Installation Options

You can install the software using one of two options:

- **Full.** Use this option when you are installing QA Tool for the first time and want all QA Tool software components.

Warning for Subsequent Installations: Use caution when using the Full install option. The program will overwrite/remove/erase your existing QA Tool database (QAT01.mdb) and all program files including (QAT32_01.exe) as well as any annotations you may have made to Help.

- **Custom.** Use a Custom install in one of two ways.

If you have already installed a full version of QA Tool, you can use this option to add a particular file or files; for example, executable (*.exe) files, database (*.mdb) files, and help files (*.hlp). This option leaves all other database and system settings intact (unless you select *.mdb files).

Note: To upgrade, choose Custom install and select all files except your existing QA Tool v1 database files (*.mdb). This is the Custom default selection.

Follow the prompts provided by the software when installing QA Tool.

Installation Steps (Diskette)

Be sure that all Windows applications, including screen-savers, e-mail notifiers, have been closed before you proceed with this setup.

To Install the Software on Your PC

1. Turn on your PC 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 Open entry field and click **OK**. The software is installed to the default directory **C:\Program Files\EDESuite\Quality Analysis Tool 2000-2001**, unless you choose another location.
6. When prompted, insert each diskette in numerical order and click **OK**.

QA Tool asks you a series of questions during the installation. 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 is correct, click **Next** in response to each question.

Or

If not, select the correct answer and click **Next**.

7. When the installation program is finished installing the files for QA Tool, 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.

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. This 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.

Installing QA Tool on a Network

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

- If you are installing the initial QA Tool, do a full install and follow the steps provided in the **First Time Installation** section.
- If you are installing QA Tool after you have created data in the database, follow the instructions provided in the **Subsequent Installation** section.

When you perform a workstation installation, the executable file for QA Tool (QAT32_01.exe) and all other program files are installed to a workstation's local hard drive.

The installation modifies all QA Tool 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 QA Tool 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 QA Tool on local area networks.

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

First Time Installation

To Install the Software on A Network for the First Time

1. First, use the Network Server installation option to install only the QA Tool database (QAT01.mdb) on the file server, not the QA Tool program files.
2. Enter the Network server location where you want to install QA Tool v1 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, then select **Full**.

The Full option installs all program files, including the executable file (QAT32_01.exe) in a local hard drive directory.

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\Quality Analysis Tool 2000-2001**, or some other local designation.

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

Subsequent Installation

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

1. **Do not** use the Network Server installation option for this version of the software.

The Network Server installation option is only for users installing QA Tool v1 to a network file server for the first time. Choosing this installation option installs an empty QAT01.mdb (QA Tool database file) on the network file server, overwriting any existing database.

2. Choose the **Network Workstation** installation option.
3. You are then prompted for the location of your QAT01.mdb during the QA Tool 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 procedure occurs when the software is accessed the next time.

For example, if you are adding a workstation to your work environment, you do a Full network workstation install of the current version of QA Tool for that workstation. When the first user logs into QA Tool, the update runs. Subsequent installs will not update the database again.

You do not have to upgrade incrementally on that one station.

5. Follow the prompts provided by the Setup program.

If you have questions, contact CPS Customer Service at 800/330-5947 or via e-mail at cps@ncs.com.

To Install Subsequent and Future Releases

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

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

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

Instructions for Schools with Diskettes

To Install the Software Using Diskette Directories on a Server

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.

For example, if you receive four diskettes, then create four directories on the file server; if you receive six diskettes, then create six directories on the file server; if you receive nine diskettes, then create nine directories on the file server, etc.

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

Example:

\Install

\Install\DISK1

\Install\DISK2

\Install\DISK3

\Install\DISK4

\Install\DISK5

\Install\DISK6

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 Tool 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, contact CPS Customer Service at 800/330-5947.

Install Log

Each time an installation is performed, an Install Log is created. The tracked information includes 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:\Program Files\EDESuite\Quality Analysis Tool 2000-2001** directory (or the location you specified during the Installation Process).

Example:

<APP NAME>	QA Tool for Windows v1
<VERSION>	1.X
<TYPE>	Stand Alone Full
<SUMMARY>	New release
<TARGET>	C:\Program Files\EDESuite\Quality Analysis Tool 2000-2001
<DATE>	03-02-2001
<TIME>	08:36:54

Changing the QA Tool Database Path

You can change the QA Tool database path from within the QA Tool v1 software.

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

To Change the Database Path

1. Open QA Tool 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 is a tree-view style window, and in the right window is a list-style window with two fields: **Name** and **Value**.

If you do not see the “Year01” label in the left window

- Single left click on the plus sign (+) next to EDESUITE.
- A label indicating the software’s year cycle under EDESUITE appears.

If you do not see the “Quality Analysis Tool” label in the left window

- Single left click on the plus sign (+) next to Year01.
 - A label indicating the software’s name appears.
 - Highlight the name of the software.
4. On the right side of the split screen, find **Database** under the **Name** field, click on 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 (QAT01.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 software.

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

You can confirm this by viewing the current database name and location in the status bar in the bottom right-hand corner of the software window.

Uninstall

To uninstall QA Tool, 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 QA Tool you installed (except for the INSTALL.log file).

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

To Uninstall Quality Analysis Tool 2000-2001

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**.
4. Click **OK**.

QA Tool 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

When You Start QA Tool

QA Tool first helps you locate your EDEExpress database or your Quality Assurance Program for Windows database so you can import ISIR data into the software.

QA Tool can find the database on a local or network drive, or you can enter the location.

If you are using ISIR data from:

- EDEExpress**
 - Click **OK** at the first prompt, “If you are an EDEExpress user, the following wizard will help you...”
 - The default name for the database (unless you have renamed it) is **expres90.mdb**.
 - When you find the database, the Startup Information dialog box appears.

- QAP**
 - Click **Cancel** at the first prompt.
 - Click **OK** at the second prompt, “If you are a QAP user, the following wizard will help you...”
 - The default name for the database is **qap90.mdb**. When you find the database, the Startup Information dialog box appears.

- ASCII file**
 - Click **Cancel** at the first prompt.
 - Click **Cancel** at the second prompt.
 - The Startup Information dialog box appears.

When you read the information in the Startup Information dialog box and click OK, the Login dialog box appears and prompts you to enter your user ID and password.

See the next section, “Logging in for the First Time.”

Logging In for the First Time

The first time you start QA Tool, you will need to become familiar with the Startup Information box, how to enter a user ID and password, and how to create a new password. Instructions for these tasks are provided within this section.

Startup Information Box

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

To View and Close the Startup Information Box

1. The first time you access QA Tool, 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 QA Tool, you must enter a valid user ID and password.

QA Tool requires passwords for system security.

To Access QA Tool for the First Time and Establish Your New Password

1. Type **SYSADMIN** for both your user ID and password.
Note: SYSADMIN is the user ID and password included with QA Tool.
2. Press **Enter** or click **OK**.
You are prompted to type a new password.

3. Press **Enter** or click **OK**.
4. Type a New Password and re-enter this password in the **Verify Password** field.
 - 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. Once a user ID and password are established, make a note of them and keep them in a safe place.

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

Resetting Your User ID and Password

If you have forgotten your password, you can have your QA Tool 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. Then, select **Global, Security Users**.

If you are the QA Tool for Windows administrator and you have forgotten your password, call CPS Customer Service at 800/330-5947 for help with resetting the default user ID and password to SYSADMIN.

All QA Tool for Windows users, especially QA Tool for Windows administrators, should record their user IDs and passwords and keep them in a safe place.

Steps in the QA Tools Process

Step 1: Setting Up the Software

You must use the **System** option under **Tools, Setup** to define general system information before you can import and analyze data. Other setup options include file management and user database.

You may also want to create some custom formats to help you extract the specific data you need.

Security functions are also available under Setup. These options allow the QA Tool administrator to create user IDs and select the functions that each user ID can access.

System Setup

From the main menu bar select:

- **Tools, Setup, System**
- **Tools, Setup, File Management**
- **Tools, Setup, User Database**

Custom Formats Setup

From the main menu bar select:

- **Tools, Custom Formats, Custom Reports**
- **Tools, Custom Formats, Selected Fields**
- **Tools, Custom Formats, Field Increments**
- **Tools, Custom Formats, EFC Ranges**

Security Setup

From the main menu bar select:

- **Tools, Setup, Security Users**

Step 2: Importing Data

After you have defined your system settings, the next step is to import your data.

Import Data

From the main menu bar select:

- **File, Import**

Step 3: Validating Data

Data Validation is a process that deletes unmatched records from the database.

When you have imported your data, you must validate it before you can analyze it.

Run the Data Validation process **after you import** data and **before you analyze** the data.

You must run the process before you print reports.

Validate Data

From the main menu bar select:

- **Process, Data Validation**

Step 4: Analyzing Data

QA Tool allows you to compare the Initial and Paid On transactions side by side on the Transaction Comparison tab.

You can also view data in user-defined fields on the User Database tab.

In the Print function, you will find reports that compile the data in a variety of ways, as well as Custom Reports that include only the data you specify.

Analyze Data

From an open record click:

- **Transaction Comparison tab**

Note: You can choose to see all fields, or you can choose a specific group of fields using **Selected Fields Codes** that you define in **Setup, Custom Formats, Selected Fields**.

Print Reports

From the main menu bar select:

- **File, Print**

Step 5: Submitting the Final Data File

When you have run the Data Validation process and added verification information for each student, you can upload your database directly to the QAP Web site at:

<http://www.ed.gov/offices/OSFAP/QAP>

Getting Help

Basics

If you need help in installing QA Tool:

- Review installation instructions
- Become familiar with your PC
- Contact your system administrator
- Use QA Tool online Help
- Call or e-mail CPS Customer Service

These approaches are described below.

Review Installation Instructions

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

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

If you still have difficulty, contact CPS Customer Service at 800/330-5947 or via e-mail at cps@ncs.com.

Become Familiar with Your PC

Once you successfully complete the QA Tool 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 your system's configuration.

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.

QA Tool Online Help

Instead of a paper user's guide, QA Tool 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.

Customer Service

Title IV WAN Customer Service

If you do not have access to the Internet or have trouble opening the SFAdownload Web site, contact Title IV WAN Customer Service at:

800/615-1189

Representatives are available to assist you between 7 a.m. and 10 p.m. (CT), Monday through Friday, excluding holidays.

You may also send your inquiries via the Internet to Title IV WAN at:

T4WAN@ncs.com

SFA Technical Support

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

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

Department staff or contractors for the system about which you have a question will see your posting and begin working on a response.

Note: You must have a subscription to SFATECH in order to send and receive messages from the list.

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 can also send your inquiries via the Internet to CPS at:

cps@ncs.com

Guidelines for Calling Customer Service

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

- Your TG ID.
- The version of the software you are using (under Help/About Quality Analysis Tool...).
- 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 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 Voice Response System

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

Example:

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

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

You are presented with a menu of options.

Choose the area appropriate to the information or assistance you need. See the table on the next page for a listing of menu options with their descriptions.

CPS Voice Response System

Menu Option	Description of Menu Options
1	CPS Automated Customer Service Center – Choose this option to reach the automated system through which you can check the status of batches and applications, request faxable materials and information, and obtain other data, such as reject, comment, and assumption code definitions.
2	Application Processing/Renewal Applications – for assistance with the Application Processing module of EDEExpress for Windows or for help with Renewal Applications for Windows. You can also check the status of batches sent to the CPS for processing, FAFSA and correction results and rejects, EDE certification testing, and installation questions.
3	Direct Loan – for assistance with the Direct Loan module of EDEExpress for Windows, including installation questions. Representatives can also assist you with Direct Loan Technical Reference questions.
4	Pell Payment – for assistance with the Pell module of EDEExpress for Windows, including installation questions.
5	SSCR – for assistance installing or using the SSCR program.
6	Quality Analysis Tool for Windows – for assistance with installing or using the QA Tool for Windows stand-alone program.
7	Packaging – for assistance with the Packaging module of EDEExpress for Windows, including installation questions.
8	FISAP for Windows – for assistance installing or using the stand-alone FISAP for Windows program.
9	Return of Title IV Funds for Windows – for assistance installing or using the Return of Title IV Funds for Windows software stand-alone program.