
Installation Guide for

Direct Loan Tools for Windows

Release 4.0

U.S. Department of Education



F E D E R A L
S T U D E N T A I D

TABLE OF CONTENTS

INTRODUCTION	3
Preface.....	3
DL Tools Features.....	4
Imports	4
Reports	4
Access 2002	5
DL Tools Release 4.0 and Prior DL Tools Versions	6
EDconnect.....	8
Using this Installation Guide	9
INSTALLATION INSTRUCTIONS	10
Installation Process	10
Folder Creation	11
FSAdownload Web Site.....	11
Installation Steps at a Glance.....	12
Downloading Documentation and Software from the FSAdownload Web Site	13
Sample Download Times	13
Getting Help.....	13
Downloading Documentation from the FSAdownload Web Site.....	14
Downloading Software from the FSAdownload Web Site.....	15
Installing the Software on a Single-User System	17
Installation Options.....	18
Installing Subsequent Releases.....	19
Windows Installation Log.....	20
Changing the DL Tools Database Path.....	21
To Change the Database Path	21
Uninstall.....	23
To Uninstall DL Tools	23

GETTING STARTED	24
Logging In for the First Time	24
User ID and Password.....	24
Resetting Your User ID and Password	26
To Access the Security Users Function	26
 SYSTEM REQUIREMENTS	 27
Hardware and Software Requirements	27
LAN Hardware and Software Recommendations.....	29
Recommended Items to Consider	30
Estimating Hard Disk Space	31
 LOCAL AREA NETWORK (LAN) INFORMATION.....	 32
Installing the Software on a Network	32
Installation Options.....	32
Installation Instructions.....	34
First Time Network Installation.....	35
Subsequent Network Installation	36
Instructions for Schools with Diskette Directories on a Server	37
LAN Server Compatibility.....	38
LAN Cautions	38
LAN Messages.....	39
Additional LAN Instructions	41
 GETTING HELP	 42
Basics	42
Review Installation Instructions	42
Become Familiar with Your PC.....	43
Contact Your System Administrator.....	43
Use DL Tools Online Help	43
Technical Support.....	44
Review Sources of Assistance for Schools.....	45

Introduction

Preface

Direct Loan Tools for Windows (DL Tools) is a multi-year Windows based application designed to provide the following functionality related to all Direct Loan schools' software:

- Rebuild your Direct Loan origination and disbursement records in EDEExpress using an automated process.
- Compare the School Account Statement (SAS) report loan/disbursement data to loans and actual disbursements recorded in EDEExpress or an external file, and/or compare the SAS report cash data to the DL Tools Cash database.
- Print the SAS in a readable format.
- Track cash receipts (drawdowns) and Returns of Excess Cash (2002-2003 and 2003-2004) and Refunds of Cash (2004-2005) for Direct Loan.

DL Tools processes data for multiple cycles. Release 4.0 contains Rebuild, Cash Management, and Compare functionalities for the 2002-2003, 2003-2004, and 2004-2005 cycles.

All Direct Loan schools can use the Compare and Cash Management functionalities. The Rebuild process is for schools to rebuild an EDEExpress database in the Direct Loan module. Non-EDEExpress users have the option of exporting data from a rebuilt EDEExpress database to recreate other needed non-EDEExpress loans or databases. For information on exporting from EDEExpress to an external system and creating File Formats, see Volume V of the *2004-2005 COD Technical Reference*.

DL Tools Features

Imports

You can import the following data files:

- Rebuild

When selecting the Rebuild import type, you have three options to choose:

- Compare Only
 - Update All
 - Update Selected Records
- SAS
 - Loan Detail External Add
 - Disbursement Detail External Add
 - Cash Detail External Add

Reports

The following reports are available in DL Tools. To print some reports, you must have a connection to the Direct Loan database of EDEXpress.

- Cash Report
- Cash Detail Comparison
- Loan Detail Comparison – Loan Level
- Disbursement Detail Comparison
- SAS Cash Detail
- SAS Loan and Disbursement Detail
- Disbursement Measurement Tool report

Access 2002

Past DL Tools software releases have used databases built on a Microsoft Access 97 framework. For DL Tools for Windows, Release 4.0 and subsequent releases, we will be using a Microsoft Access 2002 database framework. Note the following:

- Access 2002 software databases will run on all currently supported Microsoft Windows operating systems, which include Windows 98, Windows NT, Windows 2000, Windows Me, and Windows XP.
- You do NOT need to have any version of Microsoft Access (97 or 2002) installed on your PC to run current or future releases of DL Tools.
- You will not be able to open or view the DL Tools for Windows, Release 4.0, database or other future software releases using Microsoft Access 97. Microsoft Access 2002 databases are incompatible with Microsoft Access 97.

The Department continues to strongly discourage users from viewing and/or manipulating any EDESuite software database using Microsoft Access. Making changes to the software database (using any version of Microsoft Access) can potentially cause damage to the database structure and proper software functionality and limit our ability to support problems you might encounter as a result.

If you choose to access any Department software database using Microsoft Access, ensure you are viewing a copy of the database file and not your live, production database file. Also, ensure you have a safe, reliable back-up of your software databases created prior to using Microsoft Access to access live or back-up copies of your software databases.

Important Installation Note: If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install DL Tools. If you are not an Administrator, you will receive a warning when you try to install DL Tools. Once an Administrator has installed DL Tools, you can run DL Tools for Windows as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

DL Tools Release 4.0 and Prior DL Tools Versions

Important Installation Information

With DL Tools conversion from an Access 97 framework to an Access 2002 framework, DL Tools for Windows, Release 4.0 involves a different installation process than other Department software releases, such as EDEExpress for Windows. Unlike these other software products, you must perform the **Full** installation option if you wish to upgrade from the last official release (Version 3.1) to Release 4.0. This **Full** (rather than Custom) installation is atypical and is only needed one time upon your initial installation of Release 4.0 to accommodate the copying of data from the prior version to the Release 4.0 database.

See the sections “Installing the Software on a Single-User system” or “Installing the Software on a Network” in this guide for more information on the installation process, dependent on your planned environment for Release 4.0.

The following tables explain the different steps you must take to properly install DL Tools for Windows, Release 4.0 on your school’s system, dependent on whether or not you need to carry DL Tools data and cash records forward from prior releases of DL Tools.

If you need to carry forward your DL Tools data/cash records:

Carry Forward DL Tools Data/Cash Records to Release 4.0	
Last working version of DL Tools on your system?	Action Required
DL Tools Version 3.1	1. Perform Full Installation of DL Tools Release 4.0
DL Tools Version 3.0	1. Perform Custom Installation of DL Tools Version 3.1 and reboot 2. Access DL Tools software to allow database update to run 3. Perform Full Installation of DL Tools Release 4.0
DL Tools Version 2.0	Are you sure you require 2002-2003 data/cash? If yes: 1. Perform Custom Installation of DL Tools Version 3.1 and reboot 2. Access DL Tools software to allow database update to run 3. Perform Full Installation of DL Tools Release 4.0 If no: 1. Back-up and store your Version 2.0 .mdb elsewhere, then delete the Version 2.0 .mdb and .exe files from the program directory (typically C:/Program Files/ EDESuite/ DL Tools) 2. Perform Full Installation of DL Tools Release 4.0

If you need to carry forward your DL Tools data/cash records:

Carry Forward DL Tools Data/Cash Records to Release 4.0 (Continued)	
Last working version of DL Tools on your system?	Action Required
DL Tools Version 1.0	<p>Are you sure you require 2001-2002 data/cash? If yes OR no:</p> <ol style="list-style-type: none"> 1. Back-up and store your Version 1.0 .mdb elsewhere, then delete the Version 1.0 .mdb and .exe files from the program directory (typically C:/Program Files/EDESuite/DL Tools) 2. Perform Full Installation of DL Tools Release 4.0

If you do not need to carry forward your DL Tools data/cash records:

Do Not Need to Carry Forward DL Tools Data/Cash Records to Release 4.0	
Last working version of DL Tools on your system?	Action Required
DL Tools Version 3.1	<ol style="list-style-type: none"> 1. Back-up and store your Version 3.1 .mdb elsewhere, then delete the Version 3.1 .mdb and .exe files from the program directory (typically C:/Program Files/EDESuite/DL Tools) 2. Perform Full Installation of DL Tools Release 4.0
DL Tools Version 3.0	<ol style="list-style-type: none"> 1. Back-up and store your Version 3.0 .mdb elsewhere, then delete the Version 3.0 .mdb and .exe files from the program directory (typically C:/Program Files/EDESuite/DL Tools) 2. Perform Full Installation of DL Tools Release 4.0
DL Tools Version 2.0	<ol style="list-style-type: none"> 1. Back-up and store your Version 2.0 .mdb elsewhere, then delete the Version 2.0 .mdb and .exe files from the program directory (typically C:/Program Files/EDESuite/DL Tools) 2. Perform Full Installation of DL Tools Release 4.0
DL Tools Version 1.0	<ol style="list-style-type: none"> 1. Back-up and store your Version 1.0 .mdb elsewhere, then delete the Version 1.0 .mdb and .exe files from the program directory (typically C:/Program Files/EDESuite/DL Tools) 2. Perform Full Installation of DL Tools Release 4.0

EDconnect

The Student Aid Internet Gateway (SAIG) is the Department's information highway, linking members of the financial aid community with Federal Student Aid (FSA) and the Title IV Application Systems. FSA provides the EDconnect software to make it possible to send and receive data through the SAIG.

You can download the *SAIG Desk Reference for EDconnect* and *EDconnect Installation Guide* from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at fsadownload.ed.gov.

Using this Installation Guide

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

In this guide, you will find information on hardware and software requirements, estimating the amount of hard disk space you will need on each computer, LAN compatibility issues, and how to get help.

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

Installation Instructions

Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing DL Tools on a single-user system.

We provide instructions for network system installations in the “Local Area Network (LAN) Information” section of this guide.

Other topics included in this section are:

- Default folder creation with installation
- FSAdownload Web site
- Downloading documentation and software from the FSAdownload Web site
- Installing the software
- Installation log
- Changing the database path for DL Tools
- Uninstalling the software

Folder Creation

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

C:\Program Files\EDESuite\DL Tools for Windows

The installation program assumes that the C: drive is your local hard disk, but you can change the drive letter if necessary. Also, you can use a different name for the folder.

Caution: You can change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each DL Tools software update you receive for enhancements to be loaded properly.

FSAdownload Web Site

You can download the DL Tools software in two formats from the FSAdownload Web site located at fsadownload.ed.gov. You can download the entire software in one file, called DLTools4X.exe (where 4X is the release number) or you can download the software in separate installments, which you can copy to a network drive, CD, or zip disk. You cannot use floppy disks because they do not have enough storage space. See “Downloading Software from the FSAdownload Web Site” in this guide for more details.

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

Installation Steps at a Glance

Step	Action	Reference
1	Download all supporting documentation from the FSA Web site at fsadownload.ed.gov .	Read “Downloading Documentation from the FSAdownload Web Site” for instructions.
2	Download the software from the FSA Web site at fsadownload.ed.gov .	Read “Downloading Software from the FSAdownload Web Site” for instructions.
3	Install the software.	Read the “Installing the Software on a Single-User System” section for instructions.

Downloading Documentation and Software from the FSAdownload Web Site

You can download FSA software from the Internet on the Department's Federal Student Aid Download (FSAdownload) Web site located at fsadownload.ed.gov. This site also houses FSA documentation such as the DL Tools Cover Letter and the *2004-2005 COD Technical Reference, Volume VI (DL Tools)* for easier and more efficient use of DL Tools.

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 a direct connection to the Internet, we recommend a 56 kbps modem at a minimum.

The table below shows approximate download times for various file sizes and connection speeds. The actual times vary depending on the type and quality of your Internet connection.

Download Speed	1 Megabyte	5 Megabytes	10 Megabytes
33.6 kbps	5 min.	25 min.	51 min.
56 kbps (53 kbps)	3 min.	16 min.	32 min.
768 kbps or higher (typical for cable modems and DSL)	15 sec. or less	1 min., 15 sec or less	2 min., 30 sec or less
1.5 mbps or higher (typical for T1 lines)	7.5 sec. or less	37 sec. or less	1 min., 15 sec. or less

Getting Help

Some organizations restrict their users from downloading files from File Transfer Protocol (FTP) sites.

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

Downloading Documentation from the FSAdownload Web Site

You can download FSA documentation from the Internet in Adobe PDF (Portable Document Format) format.

The following types of documentation are available to download for DL Tools:

- Cover Letter
- Installation Guide
- 2004-2005 COD Technical Reference, Volume VI (DL Tools)

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

To Download Documentation

1. Go to the address field located at the top of your browser's screen and type fsadownload.ed.gov. You may need to press the **Enter** key or click the **Go** button.
2. Click on the **Software and Associated Documents** link.
3. Click **DL Tools 2004-2005 Release X** (where X is the release number) to the left of this description. You are taken to the download site.
4. Choose the type of documentation you want to download by clicking the appropriate **PDF Format** link associated with the file.
5. If you would like to save a copy of the document to your system click **File, Save As** from the browser menu bar. Select a location on your computer, and then click the **Save** button to save the file. If **Save As** is not available, you can also click the diskette button to select a location to save the file to your computer. The Web site is designed to give the file a default name; however, you can choose another name for the file.
6. Once the document is downloaded, go to the saved location and double click on the file to open and print it.

Downloading Software from the FSAdownload Web Site

We distribute DL Tools and its related documentation through the Internet using the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, fsadownload.ed.gov. The software is available in two formats. You can download the entire program in one file (DLTools4X.exe [where 4X is the release number]), 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 (Uniform Resource Locators) field located at the top of your browser's screen and type fsadownload.ed.gov.
2. Click the **Software and Associated Documents** link.
3. Click the **DL Tools 2004-2005 Release X** (where X is the release number) link. You are taken to the download site.
4. Click the **Full Download** link in the software section to download the program as a single file. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.
5. Select the download location and click **Save**.

Note: You can save the file to your hard drive, network drive, CD, or zip disk. You cannot use floppy disks because they do not have enough storage space.

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

6. Once the file is downloaded, go to the saved location and double click **DLTools4X.exe** (where 4X is the release number) to extract the file and install the software.

Note: See "Installing the Software on a Single-User System" or "Installing the Software on a Network."

To Download the Software in Separate Installments

1. Go to the URL field located at the top of your browser's screen and type fsadownload.ed.gov. You may need to press the **Enter** key or click the **Go** button.
2. Click on the **Software** link on the left-hand side of the screen.
3. Click the **DL Tools 2004-2005 Release X** (where X is the release number) link. You are taken to the download site.
4. Click the **Disk 1** link in the software section to download the program as a single file. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.
5. Select the download location and click **Save**.

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

6. After the download of Disk 1 is finished, click **Disk 2**. Save Disk 2 to the same location as Disk 1.
7. Click each succeeding disk until they have all been saved to the same location on your computer.
8. Once the software disk files are downloaded to your computer, go to that location, double-click **disk1.exe**, and unpack it to the same folder where the other disks were downloaded. Disk 1 is a self-extracting zip file. Then double-click on **setup.exe** to install the software.

Note: See “Installing the Software on a Single-User System” or “Installing the Software on a Network.”

Installing the Software on a Single-User System

Downloading the software from fsadownload.ed.gov does not install it. After downloading the software to your computer, you must install it. For installing the software on a LAN, see “Installing the Software on a Network” in this guide.

Important Installation Note: If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install DL Tools. If you are not an Administrator, you will receive a warning when you try to install DL Tools. Once an Administrator has installed DL Tools, you can run DL Tools for Windows as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school’s technical department if you receive a warning that an Administrator must install the DL Tools software.

Installation Options

You can install the software to a standalone PC using one of two options:

1. **Stand Alone Full.** Use this option when you are installing DL Tools for Windows, Release 4.0, to a single, non-networked PC for the first time, or if you are upgrading from DL Tools Version 3.1 to Release 4.0.

Important Installation Note: DL Tools for Windows, Release 4.0 is an upgrade to version 3.1. *If you did not upgrade from DL Tools Version 3.0 to Version 3.1, you must do so prior to upgrading to Release 4.0.* Version 3.1 is available for download from the FSAdownload Web site, located at fsadownload.ed.gov.

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

2. **Stand Alone Custom.** Use a Custom installation in one of two ways on a single non-networked database. If you have previously installed a module the module will not appear in the Select Components dialog box, it will automatically be installed.
 - If you have already installed a full release of DL Tools, you can use this option to add a particular file or files; for example, executable (*.exe) files, database (*.mdb) files, and help (*.hlp) files. This option leaves all other database and system settings intact (unless you select *.mdb files).
 - To upgrade the software, choose the Custom installation option and select all the files except your existing database files (*.mdb).

Note: For DL Tools for Windows, Release 4.0, Full installation is the default selection.

Note: Following the Full installation option of Release 4.0, all data from your Version 3.1 database will be copied into the DL Tools Release 4.0 Access 2002 database. This occurs the first time you access the Release 4.0 software following your install. Your DL Tools Version 3.1 database will *not* be deleted or modified during this process.

Steps to Install

1. Be sure all Windows applications, including screen-savers and e-mail notifiers, are closed.
2. If you downloaded the DLTools4X.exe (where 4X is the release number) file from the FSAdownload Web site, go to the location of that downloaded file.
3. Double-click the file to open and install it. The file decompresses itself into a temporary folder (usually “c:\temp”) and continues the installation from there.
4. DL Tools asks you a series of questions during the installation. These questions verify the location of the software on your hard drive. Each question has a default answer.

Note: You must click **Yes** if you get a message asking if you would like to overwrite a read-only file when installing the software.

- If the default answer is correct, click **Next** to go to the next screen.
 - You can change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each DL Tools software update you receive for enhancements to be loaded properly.
5. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.
 6. When the installation program is finished installing the DL Tools files, it updates your Start menu. However, it does not create desktop icons or shortcuts, and it does not update them if they were previously created. You are prompted to reboot the system to complete the installation.

Installing Subsequent Releases

When you install a release of the software that is an update to a version of the same year, a special process updates the database. The update process occurs the first time the software is initialized after installing the software upgrade. It runs only once, whether on a stand-alone or networked database. If there are no updates to the database, this update will not occur.

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

Windows Installation Log

Each time you perform an installation, an installation log is created in the Windows directory of the workstation (for example, c:\winnt) and is named DL Tools<release number>.log. The Windows installation log is updated during each installation and contains a detailed record of all files affected during the installation of the application.

The information tracked in the Installation Log is the Installation directory, Windows Directory, Windows System Directory, if a CD-ROM is available, screen resolution, disk space available, boot drive, install engine, extended memory, information about files before installation and information about files after installation. This information can be helpful to users and to CPS/SAIG Technical Support in researching software issues that can occur.

Note: In past versions of DL Tools for Windows, users received a prompt to “view the Install Log” at the conclusion of the installation process. The installation log referred to by this prompt was a less detailed file than the Windows installation log, and has been removed for DL Tools for Windows. You will not receive a prompt to review the Windows installation log at the conclusion of your installation of DL Tools for Windows, although the log file is created and can be viewed at any time.

Changing the DL Tools Database Path

You can change the DL Tools database path from within the DL Tools software.

Note to Windows NT Users: To change the DL Tools database path, you must have Windows NT administrator access rights.

To Change the Database Path

1. Open DL Tools and select **Help, System Information**.
2. Click the **Files Information** tab.
3. Click the **Registry** button.
 - A Registry Viewer application displays with a split view.
 - In the left window, you see a tree-view style window, and in the right window, you see a list-style window with two fields: **Name** and **Value**.
 - Select DL Tools under Year45.
If you do not see the “Year45” label in the left window:
 - Single left click on the + (plus sign) next to EDESuite.
 - You will see a label indicating the software’s year cycle under EDESuite.
If you do not see the “Express” label in the left window:
 - Single left click on the + (plus sign) next to Year45.
 - You will see a label indicating the software’s name.
 - Highlight the name of the software.
4. On the right side of the split screen, find **Database** under the **Name** field, click it and select **Edit, Edit** from the main menu.
 - A **New Registry Value** dialog box displays with two edit boxes.
 - One box has a label of **Name** (which is disabled) and the other box has a label of **Value**.
5. Enter your new database path in the entry box next to **Value**. Include the full path and database name (DLT.mdb) exactly as it appears in Windows Explorer, with uppercase and lowercase letters.

6. Press **Enter** or click **OK**.
7. A message appears indicating that the registry value is saved. Click **OK**.
8. Exit the **Registry Viewer** by going to **File, Exit**.
9. Click **OK** to exit the System Information dialog box.
10. **Exit** the DL Tools software.

The next time you start DL Tools, you will connect to the database using the new database path. You can confirm your connection to the new database by viewing the current database name and location in the status bar at the lower right-hand corner of the DL Tools window.

Uninstall

To uninstall DL Tools, click **Start, Programs** from your Windows Desktop and select **EDESuite, DL Tools for Windows** to see an icon for the Uninstall utility.

Choosing Uninstall deletes all icons created during the installation of the software from the start menu, the software's program group, all executable files, all Dynamic Link Library (DLL) files, and the entire database for the release of DL Tools you have installed.

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

Note to Windows NT Users: To uninstall, you must have the same or greater Windows NT access rights as the person who originally installed DL Tools.

To Uninstall DL Tools

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**.

DL Tools 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 before performing a Custom installation.

Getting Started

Logging In for the First Time

The first time you start DL Tools, the Startup Information box displays. You need to become familiar with the Startup Information dialog box, how to enter a user ID and password, how to create a new password, and how to establish your school as the assumed school used by DL Tools. We provide instructions for these tasks in this section.

User ID and Password

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

DL Tools requires a unique user ID and password for each user for system security.

To Access DL Tools for the First Time and Establish Your New Password

1. Type in the default user ID, **SYSADMIN**.
2. Type in the default password, **SYSADMIN**.
3. Type your **new password** in the New Password text entry box. You must change the default password by typing a new one in this field.
 - You can enter up to eight alphanumeric characters.
4. Type the **new password** again in the Verify Password field.
 - The New Password and Verify Password must be the same.
5. Click **OK** to log in.

Note: The SYSADMIN user ID should be reserved for system administrator functions. All users should have a unique user ID and password for logging into the software.

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

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

Resetting Your User ID and Password

If you have forgotten your password, you can have your DL Tools administrator give you a new one using the User Security function.

To Access the Security Users Function

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

If you are the DL Tools administrator and you have forgotten your password, call CPS/SAIG Technical Support for help with resetting the password for the default SYSADMIN user ID.

All DL Tools users, especially DL Tools administrators, should record their user IDs and passwords and keep them in a safe place.

System Requirements

Hardware and Software Requirements

The following hardware and software components are required for DL Tools:

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better
- 128 MB total memory or more
- 20 GB hard drive
- A connection to the Internet (analog modem, cable modem, DSL, T1, etc.)

Note: A connection to the Internet is necessary to access the Information for Financial Aid Professionals Web site located at ifap.ed.gov, and the FSAdownload Web site located at fsadownload.ed.gov.

- Dedicated phone line if you connect to the Internet through a modem
- 3.5"/1.44 MB high-density floppy disk drive, including 3.5" high-density double-sided diskettes
- 24x or faster CD-ROM drive
- A sound card
- Windows-compatible keyboard (for example, IBM enhanced 101 or 102 keyboard)
- Microsoft compatible mouse
- Laser printer capable of printing on standard paper (8 1/2" x 11")

- 32-bit operating system (Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x, Microsoft ME, or Microsoft Windows XP)

Important Note: If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install DL Tools. If you are not an Administrator, you will receive a warning when you try to install DL Tools. Once an Administrator has installed DL Tools, you can run DL Tools for Windows as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues.

- Super Video Graphics Adapter (SVGA) monitor and video card capable of 800 x 600 resolution (small fonts only) or higher

Note: DL Tools is designed to be viewed with 800 x 600 resolution. You can use a resolution higher than this at your own discretion.

- Microsoft Internet Explorer version 5.X or higher

LAN Hardware and Software Recommendations

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

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better
- 128 MB total memory or more on each workstation
- 20 GB hard drive available hard disk space on the file server and 600 MB available on the network drive. (This depends on the number of records you will store in your database.)
- Desktop Operating System: Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x, Microsoft ME, or Microsoft Windows XP

Important Note: If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install DL Tools. If you are not an Administrator, you will receive a warning when you try to install DL Tools. Once an Administrator has installed DL Tools, you can run DL Tools for Windows as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues.

- Network Operating System: Novell NetWare versions 3.12 or above or 4.11 or above, Windows 2000 Server, Windows 2000 Advanced Server or Microsoft Windows NT 4.0

Note: Novell NetWare versions 3.12 and 4.11 are separate products.

- 16 megabit/sec transfer rate on the network for token ring, 10 megabit/sec transfer rate on the network for Ethernet, or the maximum transfer rate your network topology supports
- Super Video Graphics Adapter (SVGA) monitor and video card capable of 800 x 600 resolution (small fonts only) or higher

Note: The DL Tools software is designed to be viewed with 800 x 600 resolution. You can use a resolution higher than this at your own discretion.

Refer to "Systems Requirements" for a complete listing of the general hardware and software required for DL Tools.

Recommended Items to Consider

We strongly encourage you to use the following additional tools to assist you in managing and protecting your financial aid data:

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

Estimating Hard Disk Space

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

To find out the approximate total space required, add together the amounts shown for each ED software product and the types of records you are using. You should also take into account other software products installed on your PC. For example, the total space required for 5,000 ISIR, National Student Loan Data System (NSLDS), Packaging, Pell, and Direct Loan records using all of the software products listed is approximately 119 MB.

Each software product requires the following space:

Product	Size
EDExpress for Windows	16 MB
EDconnect for Windows	15 MB
DL Tools for Windows	5 MB
Student Status Confirmation Reporting (SSCR)-32 with 300 records	6 MB

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

Record	Size
ISIR	16 MB
NSLDS	7 MB
Packaging	3 MB*
Pell	2 MB**
Direct Loan	49 MB***

* Includes only ISIR data imported into Packaging, for example, no budgets added, no records packaged, etc.

** Includes two anticipated disbursements per origination record

*** Includes origination records only; no disbursements

Local Area Network (LAN) Information

Installing the Software on a Network

Installation Options

You can install the software to a LAN using one of three options:

1. **Network Server.** Use this option when you are installing the DL Tools for Windows, Release 4.0, database to a network server for the first time or if you are upgrading from DL Tools Version 3.1 to Release 4.0. The Network Server installation should always be completed prior to the Workstation Full installation.

Important Installation Note: DL Tools for Windows, Release 4.0 is an upgrade to version 3.1. *If you did not upgrade from DL Tools Version 3.0 to Version 3.1, you must do so prior to upgrading to Release 4.0.* Version 3.1 is available for download from the FSAdownload Web site, located at fsadownload.ed.gov.

Warning for Subsequent Installations: Use caution when using the Network Server installation option. The program overwrites, removes, and erases your existing DL Tools database (DLT.mdb).

2. **Workstation Full.** Use this option when you are installing DL Tools for Windows Release 4.0 on a workstation used to access a server-based copy of the software for the first time or if you are upgrading from DL Tools Version 3.1 to Release 4.0. You must run the Network Server installation prior to running the Workstation Full installation on your workstation(s).

Important Installation Note: DL Tools for Windows, Release 4.0 is an upgrade to version 3.1. *If you did not upgrade from DL Tools Version 3.0 to Version 3.1, you must do so prior to upgrading to Release 4.0.* Version 3.1 is available for download from the FSAdownload Web site, located at fsadownload.ed.gov.

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

3. **Workstation Custom.** Use a Custom installation in one of two ways to install components of the software to a workstation that will be used to access a server-based copy of the database. If you have previously installed a module the module will not appear in the Select Components dialog box, it will automatically be installed.
 - If you have already installed a Workstation Full release of DL Tools, you can use this option to add a particular file or files; for example, executable (*.exe) files and help (*.hlp) files. This option leaves all other database and system settings intact.
 - To upgrade the software, choose Workstation Custom installation and select all files except your existing database files (*.mdb). In DL Tools Release 4.0, Stand-Alone Full installation is the default selection.

Note: All data from your Version 3.1 database will be copied into the DL Tools Release 4.0 Access 2002 database. This occurs the first time you access the Release 4.0 software following completion of your Network Server and Workstation Full installations. Your DL Tools Version 3.1 database will *not* be deleted or modified during this process.

Important Installation Note: If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install DL Tools. If you are not an Administrator, you will receive a warning when you try to install DL Tools. Once an Administrator has installed DL Tools, you can run DL Tools for Windows as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school's technical department if you receive a warning that the software must be installed by an Administrator when you try to install DL Tools.

Installation Instructions

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

- If you are installing DL Tools for the first time, do a full installation and follow the steps provided in “First Time Network Installation.”
- If you are installing DL Tools after you have created data in the database, follow the instructions provided in “Subsequent Network Installation.”

When you perform a workstation installation, the executable file for DL Tools (**DLT.exe**) and all other program files are installed to a workstation’s local hard drive. **Do not** install the program files to your server.

The installation modifies all DL Tools program group icons in your Windows Start Menu folder 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 DL Tools uses the combined resources of the workstation and the file server instead of those of the file server alone.

Follow the instructions on the next page to install DL Tools to a LAN.

Note: The DL Tools software can be installed in “safe mode” but cannot be run in safe mode.

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

First Time Network Installation

To Install the Software on a Network for the First Time

1. Select the Network Server installation option to install only the DL Tools for Windows database (**DLT.mdb**) on the file server, not the DL Tools program files.
2. Enter the network server location where you want to install DL Tools for Windows database files.

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

3. Follow the prompts provided by the **Setup** program.
4. Perform a **Workstation Full** installation on *all* workstations that will access the server-based copy of the database for this release of the software. The Workstation Full option installs all program files, including the executable file (DLT.exe) in a local hard drive folder.

The Workstation Full 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 during a Network Workstation installation:

- The software first prompts you to enter the location of the database on the server. This question is asking 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\EDSuite\DL Tools for Windows**, or another local designation.

Subsequent Network Installation

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

1. **Do not** use the Network Server installation option for a subsequent service release network installation of the software. The Network Server installation option is only for users installing DL Tools for Windows to a network file server for the first time. Choosing this installation option installs an empty DL Tools database file (DLT.mdb) on the network file server, overwriting any existing database.

If you do select the Network Server installation option for a subsequent network installation of the software, the installation program alerts you that DL Tools for Windows has already been installed in the specified directory and asks if you want to overwrite the existing release. Select **No**.

2. Click on the **Workstation Custom** installation option.
3. You are prompted to select the components you want to install.
4. You are then prompted for the location of your DL Tools for Windows database file (DLT.mdb) during the DL Tools Network Workstation installation.
5. If this is a subsequent release of the software, the database is updated only once, after all workstation installations are complete. This action occurs when the software is accessed for the first time after the upgrade. When the first user logs into DL Tools, the update runs. Subsequent installations will not update the database again.

Note: You should upgrade all workstations with the latest release before you open the software to obtain the database update message. If you fail to do this, any workstation not updated receives a database mismatch error message if a user tries to run DL Tools.

6. Follow the prompts provided by the Setup program.

Note: If you are adding a workstation to your network environment, perform a **Workstation Full** installation of the current release of DL Tools for that workstation.

To Install Subsequent Releases

For subsequent releases of DL Tools for Windows posted by the Department, you must do a **Workstation Custom** installation to ensure the database structure is updated but not overwritten. Make sure the Database option is *not* selected on the Select Components screen during the Custom workstation installation.

Follow the instructions for “Subsequent Network Installation.”

Instructions for Schools with Diskette Directories on a Server

To Install the Software Using Diskettes

If you want to copy the installation diskettes to a file server so you can do workstation installations from the server, use the following steps:

Create a disk folder for each diskette folder downloaded. For example, if you download six diskettes, then create six directories on the file server as displayed below:

\Install

\Install\DISK1

\Install\DISK2

\Install\DISK3

\Install\DISK4

\Install\DISK5

\Install\DISK6

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

1. Copy the contents of each disk into its corresponding folder on the server.
2. You can now install DL Tools from the file server by running **setup.exe** from the DISK1 folder on the server instead of carrying the CD or zip disk to each workstation.

LAN Server Compatibility

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

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

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

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

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

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

LAN Cautions

Schools with DL Tools for Windows and EDEExpress for Windows installed in a network environment with multiple users concurrently updating the databases in the software may experience record locking messages when that 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. For example, concurrent users will not be able to import a Cash Detail External Add file while cash records are being manually entered.
- When performing a Rebuild on an EDEExpress database using DL Tools, the student records in EDEExpress being recreated will be locked until the Rebuild process is complete.
- The database is locked while the Repair and Compact Database utility is running.

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.

Windows NT

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

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** button.

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

Both the location and the size of the paging files on the NT server are important to the functionality of the software. The size of the paging files on the server should generally be higher than what Microsoft recommends. If possible, move the paging files from the drive where the DL Tools software is located, even if it means putting them on the system drive.

If your NT server partition, where the database is located, is an NT File System (NTFS), remember that the folder path is case-sensitive.

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

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

Windows 2000 or XP

Windows NT has only two security groups, Users and Administrators. People assigned to the Users group in Windows NT can install and run most software. Microsoft added an additional security group to Windows 2000/XP, the Power Users group. Users in the Power Users group have roughly the same security privileges as Users in Windows NT. The Users group in Windows 2000/XP is designed to be limited and has a greatly reduced set of privileges.

If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install DL Tools. If you are not an Administrator, the installer warns you that you do not have sufficient rights to install the software. Once an Administrator has installed DL Tools, you can run DL Tools for Windows as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or “domain”) as well as on your workstation. There are no workarounds for these Windows rights issues.

Going to microsoft.com and performing a search for "file protection" will provide Microsoft articles explaining the technical details of Windows 2000/XP file protection.

Additional LAN Instructions

If you are using a NetWare product, enter the following commands from the NetWare Server Console prompt:

Set Maximum Record Locks Per Connection = 10000

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

Getting Help

Basics

There are a number of ways to get help with the installation of DL Tools:

- Review installation instructions.
- Become familiar with your PC.
- Contact your system administrator.
- Use DL Tools online Help.
- Contact Technical Support.
- Review Sources of Assistance for Schools.

These approaches are described in the succeeding sections.

Review Installation Instructions

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

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

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

Become Familiar with Your PC

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

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

Contact Your System Administrator

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

Use DL Tools Online Help

Instead of a paper user's guide, DL Tools 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 most 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.

Technical Support

Contact FSA Technical Support

FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's FSA systems, software, and mainframe products. For more information about FSATECH, including how to subscribe, visit the FSA Schools Portal Listservs & Mailing Lists:

ed.gov/offices/FSA/services/fsatechsubscribe.html

For FSA technical support, post an e-mail (including your TG number and all pertinent contact information) with your question. You will receive a response from FSA staff or the financial aid partner responsible for the system which you have a question about.

Note: You must subscribe to FSATECH in order to send and receive messages from the list.

CPS/SAIG Technical Support

CPS/SAIG Technical Support can assist you with any questions regarding:

- Technical assistance
- Software functionality
- ISIR/custom file layouts
- EDconnect functionality

Call CPS/SAIG Technical Support at:

800/330-5947

TDD/TYY: 800/511-5806

or e-mail your inquiries to CPS/SAIG Technical Support at:

CPSSAIG@pearson.com

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

Guidelines for Calling Technical Support

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

- Your TG ID (TG followed by a 5-digit number).
- The release of the software you are using (under Help/About DL Tools for Windows).
- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, and type of memory management being used).
- The exact wording of any error messages you received, as they appeared on your screen.
- A detailed description of the utility or function you were running when the error occurred, and the steps you took to get to that utility or function.
- A description of any resolution steps you took prior to calling.

CPS/SAIG Voice Response System

The CPS/SAIG Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to **enter 1** for an English-speaking operator or **enter 2** for a Spanish-speaking operator.

Review Sources of Assistance for Schools

Sources of Assistance for Schools is a document that contains helpful contact information for all FSA programs, including frequently used help lines, e-mail addresses, and Web sites. You can download the *Sources of Assistance for Schools* from the FSAdownload Web site located at fsadownload.ed.gov.