

March 2003

RE: EDEExpress for Windows 2003-2004, Version 9.1

Dear EDEExpress Users:

We are pleased to announce the availability of EDEExpress for Windows 2003-2004, Version 9.1. This software version expands EDEExpress to include both the Direct Loan and Pell Grant modules for the 2003-2004 award cycle as well as incorporate other changes to the software.

This letter describes general changes to EDEExpress for Windows and enhancements to the Direct Loan and Pell components of the software, bringing ease and flexibility to your management of Direct Loan and Pell processing for 2003-2004.

Included in this letter are the following items:

- A list of Direct Loan and Pell enhancements, including changes made as a result of EDEExpress users becoming Full Participants in the COD system in 2003-2004
- The results gathered from EDEExpress benchmark testing
- Reminders on how to back up and optimize your EDEExpress database

Common Origination and Disbursement

All schools participating in Title IV Student Financial Assistance must use the Common Origination and Disbursement (COD) System for 2003-2004 to process data for the Federal Direct Loan Program and the Federal Pell Grant Program.

School participants will use one of two processing models.

The two models are:

- Full Participation
- Phase-In Participation

The difference between the two models is driven by the nature of the data transmissions between the school and the COD System. If you use EDEExpress to export records, to be transmitted to COD, you are considered a Full Participant in 2003-2004 (vs. Phase-In Participants as EDEExpress users were in 2002-2003).

EDEExpress users will be full participants for Direct Loan/Pell Payment in 2003-2004 and will send and receive Origination and Disbursement data to and from COD using the Common Record XML format. Your school is not required to convert to the XML data format since EDEExpress is converting your data, but you will need to modify your processes to accommodate the new fields and edits that are being implemented due to COD. You must notify COD that your school will be a Full Participant by calling COD School Relations Center at 1-800-474-7268.

How to Get the Software and Documentation

We are distributing EDEExpress for Windows 2003-2004, Version 9.1 via the Internet. You can download the software and the related user documentation from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at FSAdownload.ed.gov.

Instructions for downloading EDEExpress for Windows are located in the "Downloading Paper Documentation and Software from the FSAdownload Web Site" chapter of the *2003-2004 Installation Guide for EDEExpress for Windows*.

If you do not have access to the Internet, or you have trouble opening the FSAdownload Web site, contact CPS/WAN Technical Support at **800/330-5947; TDD/TTY 800/511-5806** or via e-mail at cpswan@ncs.com.

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

If You Have Technical Support Questions

You can also post questions regarding EDEExpress for Windows on our e-mail listserv, FSATECH. 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: FSATECH Web site at:

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

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

If you have questions regarding EDEExpress for Windows, such as installation issues, software problem resolution, software functionality, and technical assistance, you can call CPS/WAN Technical Support. You can reach them Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947; TDD/TTY 800/511-5806**. You can also e-mail inquiries, comments, or suggestions 24 hours a day to cpswan@ncs.com. A representative will respond within 24 business hours.

CPS/WAN Technical Support

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EExpress for Windows, Version 9.1

EExpress consists of five software modules:

- Global
- Application Processing
- Packaging
- Direct Loan
- Pell Grant

Version 9.1 installs the Direct Loan and the Pell modules and updates Version 9.0.

General Changes that Apply to Both Direct Loan and Pell Modules

- Entity IDs are entered in Setup in three different places (source, Reporting Campus, and Attended Campus). Entity IDs are a subset of the Routing IDs (RIDs), formerly known as Common School IDs (CSIDs).
 - When you exchange Pell and DL XML Common Records with COD:
 - Batches are now renamed Documents.
 - Acknowledgements are now renamed Responses.
 - Files in Flat file format (non-XML) (i.e. Pell Data Requests, ESOA, Year-to-Date, External Import files) are still called Batches. COD returns an Acknowledgement for each Batch.
 - Disbursement Release Indicator (DRI) (formerly Payment Trigger in the 2002-2003 Technical References) for actual disbursements cannot be set to true more than 30/7/0* days in advance as follows:
 - Is based on your school's Funding Method as identified in Setup and
 - Applies to both Direct Loan and Pell Payment.
- *30 days only applies to Pell.
- New Pell Disbursement Profiles are optional. Direct Loan Disbursement Profiles are still required.

- The Disbursement Release Indicator (DRI) and Disbursement Profile Codes are available under Multiple Entry for Pell.
 - Note:** Direct Loan Multiple Entry is already set up to *only* add actual disbursements; therefore, the DRI is not needed in this module. The meaning of ‘U’ in “Disbursement Type” Multiple Entry changes from Use Anticipated Disbursement to Update DRI to True.
- External Add/Change Import remains in a flat file format.
 - You do **not** have to change your current technology in order to participate if using these functions. However, any new fields added must be included in the flat file format.
- Pell Year-to-Date reports and Pending Disbursement Year-to-Date reports will be available in a future release of 9.x.
- Pell and Direct Loan have only one Export Type and message class for Origination/Edit-Only, Disbursement, and Change records: COMRECIN. You have the option of exporting:
 - Pell only records.
 - Direct Loan only records.
 - All records (Direct Loan & Pell) ready to be sent to COD.
 - Selection Criteria are available for both Pell and Direct Loan modules.
- Pell and Direct Loan have only one Import Type and message class for Origination/Edit-Only, Disbursement, and Change record Receipts and Responses: COMRECOP.
 - Import Edit reports divide the XML response data blocks by transaction type for both Pell and Direct Loan (to keep the same look and feel you currently receive).
 - You can see COMRECOP document types in the Document Activity database.
- From the view menu of the Demo tab in EDExpress, you can check the COD Accepted Student Identifier of a student record. This allows you to compare COD’s Accepted Student Identifier to data that CPS has on file in cases where COD rejects records based on changes to current SSN, current Date of Birth, or current Last name.

Changes that Apply to Direct Loan

- Direct Loan Tab
 - Removed Loan Amount Requested Field from PLUS.
 - Removed Accepted Note ID field.
 - Changed all Batch ID or Batch # field labels to Document ID.
 - Changed all Promissory Note Status field labels to MPN Status.
 - Added CPS Transaction Number field.
 - Enabled Disclosure Statement Print Indicator Field for PLUS Loans.
- Direct Loan Disbursement Tab
 - Removed Disbursement Confirmed flag.
 - Removed D and U as valid values from the Action Type field.
 - Changed Anticipated Disbursement grid to Edit-Only Disbursement grid.
 - Moved the First Disbursement flag from the Action Fields to the Edit-Only Disbursement grid.
 - Disbursement Release Indicator (DRI) field was added to the Edit-Only Disbursements grid. Schools can create Edit-Only Disbursements at any time.
 - Values are moved from an Edit-Only Disbursement record to the Actual Disbursement grid when the DRI is selected (set to True).
 - An Edit-Only Disbursement is disabled when the Disbursement Release Indicator (DRI) is selected (set to True).
 - For Direct Loan, the disbursement sequence #1s for all disbursements will be in sync for the Edit-Only and Actual Disbursement sections on the Disbursement grids.

Changes that Apply to Pell

- Pell Setup
 - Disbursement Profile codes are new for Pell.
 - Schools can define Pell Disbursement Profile codes to create disbursements and disbursement dates for groups of students quickly and efficiently.
 - Use of the Pell Disbursement Profile codes is optional.
 - When a Disbursement Profile code is entered on the Pell (Origination) tab and it is saved, the question “Select record ready to send to Pell Processor?” is prompted. When answering Yes, the disbursement tab is activated, the disbursement dates are populated, and the award amount is split evenly between them.
- Pell Tab
 - The new verification code of S imports from the Demo tab to the Pell tab.
 - Estimated Disbursement Dates for Pell Payment have been removed from the Pell Tab and added to Pell Disbursement Profile (see above).
- Pell Disbursement Tab
 - Pell disbursements now use sequence numbers to track changes to a disbursement (similar to Direct Loan).
 - A COD system-generated disbursement will appear on the associated disbursement with a sequence number between 66 and 90.
 - A Pell award may have a maximum of 20 disbursements. However, using sequence numbers, an individual disbursement can be changed up to 65 times.
 - Disbursement Release Indicator (DRI) field was added to the Disbursement grid. The DRI can be checked (set to True) or unchecked (set to False) based on the record’s disbursement dates and your Funding Method. Schools can create and send Edit-Only Disbursements (DRI = False) to COD anytime.
- A COD Response can be imported into EDEExpress for corrections made to Pell records on the COD Website. For a Response to be imported, the student record must currently exist on the school’s EDEExpress database. The imported sequence numbers will range from 66 to 90

EDExpress Software Updates

EDExpress, Version 9.1 provides the following additional changes to the software.

Global

- Demographic records that are created either by manually or by entering a Quick Correction, now updates the Verification Status Code upon import of the ISIR when "Update Demographic Data?" is checked.
- Blank values no longer translate into zeroes when imported through the Prior Year Import process.
- When changes to the setup options "Single/Multiple (Default Print)" and "Return to Dialog" are made, the changes appear on the print dialog box the next time it is opened without having to exit and re-enter the software.

Application Processing

- The assumptions edits for parents'/student's AGI performed to determine the Simplified Needs Test have been updated to include the check for blank type of tax return with a tax return status of filed or will file.
- End of Entry Edit 4015 is checking for the correct AGI of less than 15,000.
- When entering corrections, the software counts each transaction corrected as an individual record and updates the trailer count appropriately.
- All NSLDS data in the database is displayed and printed.

Packaging

- Offer Award Letters can now be printed from the tab or globally with a Packaging Status of "O".

Pell

- The software allows for all disbursements entered to equal the award amount.

EExpress Supports These Printers

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

- HP8150DN
- HP4000N
- HP8000N
- HP4
- HP4M
- HP4MPlus
- HP4Si
- HP4Si
- HP5Si
- HP5SiMX

EExpress Benchmarking

We performed benchmarking tests on the EExpress for Windows, Version 9.1 software to determine how it operates in certain operating environments.

Imports

The benchmarking results for EExpress import files are as follows.

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

Application Processing

Import	Operating System	Benchmarking Volume	Time Elapsed
ISIR Data	NT 4.0	1000 records	35 seconds
ISIR Data	Windows 98	1000 records	42 seconds
ISIR Data	Windows Me	1000 records	42 seconds
ISIR Data	Windows 2000	1000 records	34 seconds
ISIR Data	Windows XP	1000 records	36 seconds

Direct Loan

Import	Operating System	Benchmarking Volume	Time Elapsed
External Add	NT 4.0	1000 records	1 min, 5 seconds
External Add	Windows 98	1000 records	1 min, 3 seconds
External Add	Windows Me	1000 records	1 min, 1 second
External Add	Windows 2000	1000 records	58 seconds
External Add	Windows XP	1000 records	1 min, 2 seconds
ISIR Import	NT 4.0	1000 records	1 min, 24 seconds
ISIR Import	Windows 98	1000 records	1 min, 23 seconds
ISIR Import	Windows Me	1000 records	1 min, 20 seconds
ISIR Import	Windows 2000	1000 records	1 min, 15 seconds
ISIR Import	Windows XP	1000 records	1 min, 18 seconds

Pell

Import	Operating System	Benchmarking Volume	Time Elapsed
Pell YTD Data	NT 4.0	2041 records	7 seconds
Pell YTD Data	Windows 98	2041 records	8 seconds
Pell YTD Data	Windows Me	2041 records	7 seconds
Pell YTD Data	Windows 2000	2041 records	5 seconds
Pell YTD Data	Windows XP	2041 records	7 seconds
Origination Data - ISIRs	NT 4.0	1000 records	7 seconds
Origination Data - ISIRs	Windows 98	1000 records	8 seconds
Origination Data - ISIRs	Windows Me	1000 records	7 seconds
Origination Data - ISIRs	Windows 2000	1000 records	6 seconds
Origination Data - ISIRs	Windows XP	1000 records	7 seconds

Reports

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

- These reports were tested in Windows NT, Windows 98, Windows Me, Windows 2000 and Windows XP on HP LaserJet IIISi, 4, 4 si, and 8150DN printers.
- These tests were all completed on a Pentium 800 with 128 MB RAM.
- The Average Time Elapsed column indicates the length of time starting when the user clicks OK in the EDEExpress Print dialog box and when the operating system (Windows NT/98/Me/2000/XP) print dialog appears.
- The Benchmarking Volume is the number of records and approximate number of pages that were printed in the test.

Global, Application Processing, and Packaging

Report	Operating System	Benchmarking Volume	Average Time Elapsed
Document Tracking Letter	NT 4.0	5 records	1 second
Document Tracking Letter	Windows 98	5 records	1 second
Document Tracking Letter	Windows Me	5 records	1 second
Document Tracking Letter	Windows 2000	5 records	1 second
Document Tracking Letter	Windows XP	5 records	1 second
Mailing Labels	NT 4.0	25 records	1 second
Mailing Labels	Windows 98	25 records	1 second
Mailing Labels	Windows Me	25 records	1 second
Mailing Labels	Windows 2000	25 records	1 second
Mailing Labels	Windows XP	25 records	1 second
ISIR	NT 4.0	2 records	1 second
ISIR	Windows 98	2 records	1 second
ISIR	Windows Me	2 records	1 second
ISIR	Windows 2000	2 records	1 second
ISIR	Windows XP	2 records	1 second
Processed ISIRs	NT 4.0	25 records	1 second
Processed ISIRs	Windows 98	25 records	1 second
Processed ISIRs	Windows Me	25 records	1 second
Processed ISIRs	Windows 2000	25 records	1 second
Processed ISIRs	Windows XP	25 records	1 second

Global, Application Processing, and Packaging (Continued)

Report	Operating System	Benchmarking Volume	Average Time Elapsed
Award Letters	NT 4.0	2 records	1 second
Award Letters	Windows 98	2 records	1 second
Award Letters	Windows Me	2 records	1 second
Award Letters	Windows 2000	2 records	1 second
Award Letters	Windows XP	2 records	1 second
Packaging Setup	NT 4.0	26 pages	1 second
Packaging Setup	Windows 98	26 pages	1 second
Packaging Setup	Windows Me	26 pages	1 second
Packaging Setup	Windows 2000	26 pages	1 second
Packaging Setup	Windows XP	26 pages	1 second

Direct Loan

Report	Operating System	Benchmarking Volume	Average Time Elapsed
List – Anticipated Disbursement	NT 4.0	5 records/8 pages	1 second
List – Anticipated Disbursement	Windows 98	5 records/8 pages	1 second
List – Anticipated Disbursement	Windows Me	5 records/8 pages	1 second
List – Anticipated Disbursement	Windows 2000	5 records/8 pages	1 second
List – Anticipated Disbursement	Windows XP	5 records/8 pages	1 second
MPN – Sub/Unsub	NT 4.0	2 notes/4 pages	1 second
MPN – Sub/Unsub	Windows 98	2 notes/4 pages	1 second
MPN – Sub/Unsub	Windows Me	2 notes/4 pages	1 second
MPN – Sub/Unsub	Windows 2000	2 notes/4 pages	1 second
MPN – Sub/Unsub	Windows XP	2 notes/4 pages	1 second
MPN - PLUS	NT 4.0	2 notes/4 pages	1 second
MPN – PLUS	Windows 98	2 notes/4 pages	1 second
MPN – PLUS	Windows Me	2 notes/4 pages	1 second
MPN – PLUS	Windows 2000	2 notes/4 pages	1 second
MPN – PLUS	Windows XP	2 notes/4 pages	1 second

Pell

Report	Operating System	Benchmarking Volume	Average Time Elapsed
Pell Origination Record	NT 4.0	3 records/6 pages	1 second
Pell Origination Record	Windows 98	3 records/6 pages	1 second
Pell Origination Record	Windows Me	3 records/6 pages	1 second
Pell Origination Record	Windows 2000	3 records/6 pages	1 second
Pell Origination Record	Windows XP	3 records/6 pages	1 second
Pell Disbursement List	NT 4.0	41 records/7 pages	1 second
Pell Disbursement List	Windows 98	41 records/7 pages	1 second
Pell Disbursement List	Windows Me	41 records/7 pages	1 second
Pell Disbursement List	Windows 2000	41 records/7 pages	1 second
Pell Disbursement List	Windows XP	41 records/7 pages	1 second

Reminders

New Hardware Requirements

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

<http://www.ifap.ed.gov/eannouncements/1129pcneeds.html>

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

Back Up Your Database Weekly

You should back up your EDExpress for Windows database file (EXPRES34.MDB) regularly so you do not lose your data. We recommend that you back up your files at least once a week. You should also back up your data before and after you run utilities as a precautionary measure.

EDExpress for Windows does not include a backup utility. You must use your own backup software. Be sure to test your backup software to verify that it can reliably restore your backups.

Optimize Your Database with Software Utilities

EDExpress for Windows contains utilities that allow you to optimize your database to prevent problems. We recommend that you repair, compact, and verify your database once a week. Once all three are successful, back up the database. See section "Back Up Your Database Weekly."

Run the database utilities in the following order:

- Repair Database
- Compact Database
- Verify Database
- Repair Database
- Compact Database

For specific information regarding repairing, compacting, and verifying, see "Run the Repair Database Utility."

Run the Repair Database Utility

The Repair Database utility resolves inconsistencies in record storage. Events such as a power outage or a LAN failure can corrupt your database if it occurs while EDExpress for Windows updates your records.

EDExpress for Windows may not detect database corruption, so if your system functions unpredictably (for example, you start getting database error messages, even something as simple as a missing flag on a record), use the Repair Database utility. Running this utility once a week helps to prevent database problems.

Warning: Before using this utility, be sure you have space on your hard drive that is at least equal to three times the current size of the database.

Improve Performance with the Compact Database Utility

The Compact Database utility improves the performance of EDExpress for Windows by optimizing the database (EXPRES34.MDB) file and reclaiming space on your computer's hard drive. As you add, modify, or delete records in EDExpress for Windows, the database file can become fragmented.

Running this utility weekly makes the database files smaller and improves system performance. It can also significantly reduce the size of your database. This does not mean that records are removed, only that they are organized and stored more efficiently.

Warning: Before using this utility, be sure you have hard drive space available at least equal to three times the current size of the database.

Prevent Problems with the Verify Database Utility

The Verify Database function checks for data relationship integrity in your database. If EDExpress for Windows crashes or abnormally halts processing, a record may be missing one of its associated records. Verify Database recreates the missing record.

Running this function weekly helps to prevent problems.

Warning: Before using this utility, be sure you have hard drive space available that is at least equal to three times the current size of the database.