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Installation Guide for

# EDExpress for Windows

**2001-2002**

U.S. Department of Education



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# Introduction

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## Preface

EDEExpress is a fully integrated software package provided by the U.S. Department of Education (ED) in an easy-to-use Windows format. EDEExpress offers several modules for processing Title IV financial aid, Direct Loan, and Pell data:

- Application Processing – For entering and editing initial applications, renewal applications, and corrections.
- Packaging – For packaging financial aid awards for your students.
- Direct Loan – For originating loans, printing promissory notes, and submitting disbursement records.
- Pell – For processing Federal Pell Grant data.

The first 2001 – 2002 EDEExpress for Windows software release, Version 7.0, contains the Global, Application Processing, and Packaging modules. Subsequent software releases will contain the other EDEExpress software modules (Direct Loan and Pell).

See the “What’s New for 2001-2002” pull-down menu item under **Help** for a comprehensive list of product enhancements.

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# EExpress Features

## Integrated PC Software Package

EExpress is a fully integrated PC software package that allows you to create and manage a database of financial aid records. Cross-module functions include:

- Generating batches for transmission
- Loading files to your database
- Preparing external files for transmission
- Querying student database
- Generating and printing reports
- Printing award letters
- Creating user-defined fields
- Maintaining the Title IV WAN institution database
- Setting passwords and controlling user access
- Maintaining application databases
- Tracking the receipt of student documents
- Using online help for instructions on all software functions

## Demographic Record

EExpress is organized around a feature called the demographic record. Each student in your database has a demographic record that stores the student's address, telephone number, Social Security Number (SSN), and other demographic information.

When you enter or edit a student record, you start from the demographic record screen and access the student's other financial aid records from there; for example, the Free Application for Federal Student Aid (FAFSA) and the Institutional Student Information Record (ISIR).

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## EDconn32

Important steps in processing financial aid information are sending and receiving data over the Student Aid Internet Gateway (SAIG).

To accomplish these steps, EDEExpress works with the SAIG telecommunication product, EDconn32, formerly EDconnect. EDconn32 enables you to send and receive data over the SAIG.

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

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

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

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# Help

## Online Help

Instead of a paper user's guide, EDEExpress 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 and the "EDEExpress Online Help" section in this Installation Guide for more information.

## CPS Customer Service

For questions regarding:

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

call CPS Customer Service at:

**800/330-5947**

**TDD/TYY: 800/511-5806**

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

# System Requirements

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## Hardware and Software Requirements

The following hardware and software components are required for EDEExpress:

- 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). EDEExpress 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](http://www.ifap.ed.gov), and the SFAdownload Web site, <http://SFAdownload.ed.gov>.

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## Optional Items to Consider

The following items are recommended as additional tools to assist you in 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

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## Estimating Hard Disk Space

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

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:

<b>Product</b>	<b>Size</b>
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 Applicatons 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:

<b>Record</b>	<b>Size</b>
Direct Loan	6 MB
ISIR	15 MB
NSLDS	4 MB
Packaging	2 MB

# Local Area Network (LAN) Server Compatibility

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## LAN Server Compatibility

EDEExpress 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

**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, and Sun PC-NFS. Since EDEExpress makes extensive use of Microsoft Access as a database engine, do not use these network operating systems with EDEExpress.

**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 designed for Access 97 only.

## LAN Cautions

When multiple users are concurrently updating databases in the EDExpress 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
- Database Verification

For each Utility function listed above, as well as when you are creating or deleting the User Database, there should be no one else accessing EDExpress.

## 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 Maximize Throughput for File Sharing***

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 EDEExpress 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 EDEExpress database and downloaded folder, as well as the files in each of those folders.

### **Additional LAN Instructions**

If you are using a NetWare product, please 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.

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## LAN Hardware and Software Recommendations

The following hardware and software components are recommended for running EDEExpress 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). EDEExpress 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 EDEExpress.

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

# Installation Instructions

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## Installation Process

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

Instructions are provided for both single-user and network system installation.

Depending on the type of installation you are performing (single-user or network), not all installation diskette files (or diskettes) may be required.

**Note:** If you do not have access to the Internet to download the software or if you have trouble opening the SFAdownload Web site, call Title IV WAN Customer Service at 800/615-1189, or via e-mail at [t4wan@ncs.com](mailto:t4wan@ncs.com).

Other topics include:

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

## Directory Creation

The installation process automatically creates the directory:

**C:\Program Files\EDESuite\EDExpress for Windows 2001-2002\**

for EDExpress 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 EDExpress software update you receive.

## Program Folder

The default program folder used in EDExpress is called EDESUITE. You may also change this name.

## SFAdownload

EDExpress is available on the SFAdownload Web site in two formats. You can download the entire software in one file, called EDExpress70.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, call 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 and e-mail notifiers, have been closed. Then follow the prompts provided by the software when installing EDExpress.

## 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.

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## 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 EDEExpress.

### 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.

<b>Modem Speed</b>	<b>1 Megabyte</b>	<b>5 Megabytes</b>	<b>10 Megabytes</b>
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 are having 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.

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## Downloading Software from the Web

EExpress 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 (EExpress70.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 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 **EExpress 2001-2002** to the left of this description. You are taken to the download site. Technical support for this site is provided by Title IV WAN Customer Service, via phone at 800/615-1189 and e-mail at [t4wan@ncs.com](mailto:t4wan@ncs.com).
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 where you want to save the file, then press 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 **EExpress70.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 **EExpress 2001-2002** to the left of this description. You are taken to the download site. Technical support for this site is provided by Title IV WAN Customer Service, 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 each succeeding disk until they have all been 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 **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, and e-mail notifiers, are closed.

1. If you downloaded the EDEExpress70.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 the file to open and/or install it. The file decompresses itself into a temporary directory (usually “c:\temp”) and continues the install from there.
3. EDEExpress asks you 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.

**Note:** You must click **Yes** if you get a message asking if you’d 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 answer, if you want. If you do, make sure you know the directory where the software is located.
4. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.
  5. When the installation program is finished installing the files for EDEExpress, 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.

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

## 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. The 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.

**Note:** See “Installation Options” and “Subsequent Installations” for more information about installing subsequent releases.

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## 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 are available to download for EDEExpress:

- Cover Letters
- Installation Guides
- Technical References

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 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 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 **EDEExpress 2001-2002** to the left of this description. You are taken to the download site.

Technical support for this site is provided by Title IV WAN Customer Service, via phone at 800/615-1189 and e-mail at [t4wan@ncs.com](mailto:t4wan@ncs.com).

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.

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## Installing EDEExpress on a Single-User System

EDEExpress consists of four software modules. They are:

- Application Processing
- Packaging
- Direct Loan
- Pell

The first software module listed, Application Processing, automatically installs during the installation process. In addition to application processing functionality, this module contains all of the basic global setup options (for example, security functions) for all modules. You need to complete these setup options prior to processing your Title IV financial aid data with EDEExpress.

The first EDEExpress software release, Version 7.0, is shipped with Application Processing and Packaging modules. Subsequent software releases will contain the other EDEExpress software modules (first Direct Loan, then Pell).

**Note:** ED can mail diskettes to schools who do not have access to the Internet or have trouble opening the SFADownload Web site to download EDEExpress for Windows. Call Title IV WAN Customer Service at 800/615-1189 to request diskettes.

### Installation Options

You can install the software using one of two options:

1. **Full.** Use this option when you are installing EDEExpress for 2001-2002 for the first time and want all available EDEExpress software modules installed.

**Warning for Subsequent Installations:** Use caution when using the Full installation option. The program overwrites, removes, and erases your existing EDEExpress database (EXPRES12.mdb) and all program files including (EXPRES12.exe), as well as any annotations you may have made to Help.

2. **Custom.** Use a Custom installation in one of two ways.
  - If you have already installed a full version of EDEExpress, 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).
  - To upgrade the software, choose Custom installation and select all files except your existing database files (\*.mdb); for example, EDEExpress V 7.x. This is the Custom default selection.

Follow the prompts provided by the software when installing EDEExpress.

## Installation Steps (Diskette)

Be sure that all Windows applications, including screen-savers and e-mail notifiers are 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\EDSuite\EDExpress for Windows 2001-2002**, unless you choose another location.

6. When prompted, insert each diskette in numerical order and click **OK**.

EDEExpress 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 want 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 EDEExpress, 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. The 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.

**Note:** See “Installation Options” and “Subsequent Installations” for more information about installing subsequent releases.

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## Installing EDEExpress on a Network

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

- If you are installing the initial EDEExpress, do a full installation and follow the steps provided in the “First Time Installation” section.
- If you are installing EDEExpress 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 EDEExpress (EXPRES12.exe) and all other program files are installed to a workstation’s local hard drive.

The installation modifies all EDEExpress 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 EDEExpress 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 EDEExpress on local area networks.

**Note:** Be sure that all Windows applications, including screen-savers and 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 EDEExpress database (EXPRES12.mdb) on the file server, not the EDEExpress program files.
2. Enter the Network server location where you want to install EDEExpress for Windows, Version 7.0 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, and then select **Full**.

The Full option installs all program files, including the executable file (EXPRES12.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\EDSuite\EDExpress for Windows 2001-2002**, 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; for example, EDEExpress V 7.x. The Network Server installation option is only for users installing EDEExpress to a network file server for the first time. Choosing this installation option installs an empty EXPRESS10.mdb (EDEExpress 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 EXPRES12.mdb during the EDEExpress 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 action occurs when the software is accessed the next time. For example, if you are adding a workstation to your work environment, you perform a **Full** network workstation installation of the current version of EDEExpress for that workstation. When the first user logs into EDEExpress, the update runs. Subsequent installations will not update the database again.
5. Follow the prompts provided by the Setup program.

If you have questions, call CPS Customer Service at 800/330-5947 or via e-mail at [cps@ncs.com](mailto:cps@ncs.com).

### ***To Install Subsequent and Future Releases***

For this version and all other future releases of EDEExpress, 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, call CPS Customer Service at 800/330-5947.

## 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, 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 EDEExpress from the file server by running **SETUP.exe** from the DISK1 directory on the server instead of carrying the diskettes to each workstation.

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

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## Install Log

Each time an installation is performed, an Install Log is created. The information tracked is the product and version number, type and nature of the install, drive/directory, date, and time of install. This file is named INSTALL.log and is located in your **C:\Program Files\EDESuite\EDExpress for Windows 2001-2002** directory (or the location you specified during the Installation Process).

### Example:

<APP NAME>	EDEExpress for Windows 2001-2002
<VERSION>	7.X
<TYPE>	Stand Alone Full
<SUMMARY>	New release
<TARGET>	C:\Program Files\EDESuite\EDExpress for Windows 2001-2002
<DATE>	02-02-2001
<TIME>	08:36:54

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## Changing the EDEExpress Database Path

You can change the EDEExpress database path from within the EDEExpress V 7 software.

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

### ***To Change the Database Path***

1. Open EDEExpress 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 will see a tree-view style window, and in the right window, you see a list-style window with two fields: **Name** and **Value**.

### **If you do not see the “Year12” 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 Year12.
  - 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 **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 (EXPRES12.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 EDEExpress software.

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

You can confirm that you are connected to the new database by viewing the current database name and location in the status bar at the bottom right-hand corner of the EDEExpress Window.

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# Uninstall

To uninstall EDEExpress, 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 EDEExpress you have installed (except for the INSTALL.log file).

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

## ***To Uninstall EDEExpress for Windows 2001-2002***

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**.

EDEExpress 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

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## Logging In for the First Time

The first time you start EDEExpress, you will need to become familiar with the Startup Information 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 EDEExpress. Instructions for all of these tasks are provided within this section.

### Startup Information Box

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

The first time you log in to EDEExpress, one of these messages alerts you to establish your Assumed School Code.

See the following section, Setting your Assumed School Code, for step-by-step instructions.

### *To View and Close the Startup Information Box*

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

EDEExpress requires passwords for system security.

### ***To Access EDEExpress for the First Time and Establish Your New Password***

1. Type **SYSADMIN** for both your user ID and password.  
SYSADMIN is the user ID and password included with EDEExpress.
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 the password is established, make a note of it and keep it in a safe place.

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

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

## Prior Year Data Dialog Box

EDEExpress V 7.x allows you to import most setup features from your previous year's software, V 6.x, saving you setup time. EDEExpress allows demographic data, some setup information, and most queries to be moved forward from the prior year.

### ***Can Move Forward***

- Demographic Data
- Security Groups Setup
- User-Defined Queries (All Modules)
- Pell Setup
- Packaging Setup

### ***Cannot Move Forward***

- Queries that Reference Modified/Deleted Fields, User Database, or Date Parameter
- Packaging Fund Maintenance Fund Amounts
- Estimated Disbursement Dates in Pell Setup

After logging into EDEExpress V 7.x you are prompted with the **Prior Year Data** dialog box that allows you to import your prior year user-defined queries, setup, and demographic data from EDEExpress V 6.x.

If you do not want to perform this function at this time, but may in the future, click **No** and do not check the **Don't show me this again** box.

If you do not ever want to perform this function, click **No** and check the **Don't show me this again** box.

### ***To Perform the Import of Your Prior Year User-Defined Queries and Setup***

1. Click **Yes** at the **Prior Year Data** dialog box.
2. The **Import** screen is displayed. In the **Import Type** field, select **Prior Year User-Defined Queries and Setup**.
3. Click **OK** at the bottom of the screen.

4. The **Prior Year Move Dialog** screen appears. To import your prior year data, check each type of user-defined query and setup data that you want to import.
5. After selecting the setups to import, click **OK** at the bottom of the screen.
6. A confirmation report is displayed indicating the success of the prior year data import.

### ***To Perform the Import of Your Prior Year Demographic Data***

1. Click **Yes** at the **Prior Year Data** dialog box.
2. The **Import** screen is displayed. In the **Import Type** field, select **Prior Year Demographic Data**.
3. Click **OK** at the bottom of the screen.
4. A confirmation report is displayed indicating the success of the prior year data import.

These imports are also available from the **Import** dialog box under the **Global** tab after you log into EDEExpress.

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## Setting Your Assumed Institution Code

The first time you use EDEExpress you see the warning “Assumed School Is Not Defined.”

You must set your Federal School Code in EDEExpress as the assumed school code.

Follow the steps below to set your assumed school code.

### ***To Set Your Assumed School Code***

1. Select **Tools, Setup, Global, School**.
2. Click **OK** when you get the message, “No Assumed School.”
3. Click the **Retrieve** button to bring up a list of schools.
  - Select your school from the list by using the scroll bars, and click **OK**.
  - Your school’s information fills in the institutional fields.
4. Click the **Assumed School** checkbox to define this as your assumed school.

**Note:** If you are a Direct Loan school, use your regular Federal School Code as your global school default code; you should not use your Direct Loan school code. Your Direct Loan school code is only used in **Tools, Setup, Direct Loan, System**.

5. Click **Save** to save the record.
6. Click **OK** twice.

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## Resetting Your User ID and Password

If you have forgotten your password, you can have your EDEExpress 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 **Setup, Global, Security Users**.

If you're the EDEExpress for Windows administrator and you've forgotten your password, call CPS Customer Service at 800/330-5947 for help with resetting the default user ID and password to SYSADMIN.

All EDEExpress for Windows users, especially EDEExpress for Windows administrators, should record their user IDs and passwords and keep them in a safe place where they will be remembered.

# Getting Help

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## Basics

There are a number of ways to get help in the installation of EDEExpress:

- Review installation instructions.
- Become familiar with your PC.
- Contact your system administrator.
- Use EDEExpress online Help.
- Customer Service.

These approaches are described below.

### **Review Installation Instructions**

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

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

If you are still having difficulty, call CPS Customer Service at 800/330-5947 or e-mail at [cps@ncs.com](mailto:cps@ncs.com).

## Become Familiar with Your PC

Once you have successfully completed the EDEExpress 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 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 EDEExpress Online Help

Instead of a paper user's guide, EDEExpress 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.

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## 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:

**800/615-1189**

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

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

**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 work on a response.

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

### **CPS Customer Service**

If you need technical support, call CPS Customer Service:

**800/330-5947**

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

You may also send your inquiries via the Internet to CPS:

**cps@ncs.com**

### ***Guidelines for Calling Customer Service***

When you call CPS Customer Service at 800/330-5947, you must be at your PC and prepared to provide the following information:

- Your TG ID.
- The version of the software you are using (under Help/About EDEExpress 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, 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 Voice Response System***

The CPS Voice Response System has phone routing 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 Options

**Note:** For EDEExpress assistance, choose options 2, 3, 4, or 7.

Menu Option	Description of Menu Options
1	<b>CPS Automated Customer Service Center</b> is an 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	<b>Application Processing/Renewal Applications</b> – 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	<b>Direct Loan</b> – 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	<b>Pell Payment</b> – for assistance with the Pell module of EDEExpress for Windows, including installation questions.
5	<b>SSCR</b> – for assistance installing or using the SSCR program.
6	<b>Quality Analysis Tool for Windows</b> – for assistance with installing or using the QA Tool for Windows stand-alone program.
7	<b>Packaging</b> – for assistance with the Packaging module of EDEExpress for Windows, including installation questions.
8	<b>FISAP for Windows</b> – for assistance installing or using the stand-alone FISAP for Windows program.
9	<b>Return of Title IV Funds for Windows</b> – for assistance installing or using the Return of Title IV Funds for Windows software stand-alone program.