

June 1999

Dear EDEExpress Users:

We are pleased to release EDEExpress for Windows Version 5.3. This version expands EDEExpress to include Pell Disbursement processing for the 1999-2000 award cycle. This new version makes it easier to manage your student financial aid data and gives you more processing options and greater flexibility.

We have enclosed the following items in this letter:

- Procedures for installing the upgraded version,
- Set of important reminders,
- List of enhancements to the Pell module,
- List of issues from Version 5.2 that we fixed, and
- Results gathered from EDEExpress benchmark testing.

## What You Should Do

1. Review the information attached to this letter, and
2. Use the attached instructions to install Version 5.3 on your computer.

## Status of the Recipient Financial Management System (RFMS)

To provide you better service, we developed the RFMS system for the Federal Pell Grant Program. We completed the development phase and are now conducting a comprehensive test of the system and its interchanges with our trading partners. We will accept disbursement records **July 1, 1999**. Please don't submit batches of disbursement records for the Federal Pell Grant Program until that date.

## If You Need Further Information

The EDEExpress Customer Service staff of the Central Processing System (CPS) can handle all of your EDEExpress for Windows questions regarding:

- Installation issues,
- Software problem resolution,
- Software functionality, and
- Technical assistance.

You can reach them Monday – Friday, 7:00 a.m. – 7:00 p.m. (Central Time), at **800/330-5947**. You may also email inquiries, comments, or suggestions 24 hours a day to **CPS@NCS.COM**. A representative will respond within 24 hours.

Sincerely,

CPS Customer Service

Enclosures

# EDEExpress for Windows, Version 5.3

The Department is pleased to announce the release of 1999-2000 EDEExpress for Windows, Version 5.3. This version contains the Pell module (Disbursements) for the 1999-2000 cycle. By using Version 5.3, Pell users can export disbursement/special disbursement data to RFMS and import processed disbursement acknowledgements from RFMS (message classes PGDR00IN, PGDA00OP, PGSP00IN, and PGSD00OP). Also, Pell users can export data requests and institution data, and import acknowledgements, data files, and reports sent from RFMS.

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# Upgrade Installation

Version 5.3 is an upgrade to Version 5.2. You must continue to have Windows 95, NT, or 98 as your PC operating system to run this version. You must also be in compliance with the system requirements outlined in Action Letter #2 (October 1997).

To upgrade from Version 5.2 to Version 5.3, you must perform three procedures:

1. Back up your Version 5.2 database.
2. Install Version 5.3.
3. Perform a database update.

## Installing to a Stand-alone Computer

To upgrade from Version 5.2 to Version 5.3 on a stand-alone computer or workstation:

1. Back up your Version 5.2 database.
2. Select the custom install option during your stand-alone or workstation installation, and
3. Mark the checkbox for Pell and any other modules you use (so module fixes can also be installed). Do NOT mark the "Database" checkbox unless you are performing a first-time installation or want to overwrite your Version 5.2 database. (Remember, if you choose to overwrite your Version 5.2 database, all data previously entered is lost.)
4. After you upgrade from Version 5.2 to 5.3, reboot your PC. Then log on to EDEExpress to allow the software to perform a one-time-only update of your EDEExpress database. **For this reason, we strongly recommend you perform a full backup of your Version 5.2 database prior to installing Version 5.3.**

## Installing to a Network

If you are running EDEExpress in a network environment,

1. Back up your Version 5.2 database.
2. Complete ALL of your workstation installations on all relevant production PCs. Reboot each PC after you have finished installation.
3. Access EDEExpress from ONE designated workstation. EDEExpress performs a one-time-only update of your EDEExpress database. **For this reason, we strongly recommend you perform a full backup of your Version 5.2 database prior to installing Version 5.3.**

## Warning

You must perform your upgrades in version number order. If you have not yet updated from Version 5.1 to 5.2, please do so by using the above directions prior to upgrading to Version 5.3. Remember, you MUST access the EDEExpress software and allow EDEExpress to perform the database update between each version upgrade as directed above.

For further information regarding the EDEExpress installation process, please consult the *EDEExpress Installation Guide* sent with Version 5.0.

# Reminders

## Back Up Your Database Weekly

Before you upgrade your EDEExpress to Version 5.3, you must back up your database so that you don't lose your data.

You should back up your EDEExpress database file, EXPRES90.MDB, regularly. We recommend that you back up your files at least weekly.

EDEExpress for Windows does not include a backup utility. You must use your own backup software. You should test your backup software to verify its reliability to successfully restore your backups.

## Software Utilities

The EDEExpress for Windows software contains database utilities that allow you to optimize your database if you encounter problems. We recommend that you repair, compact, and verify your database once a week. If all three are successful, back up the database (see section above).

Run the database utilities in the following order:

1. Repair database.
2. Compact database.
3. Verify database.

For specific information regarding repair, compact, and verify, see the appropriate section below.

## Repair Database

The repair database utility resolves inconsistencies (also called a database corruption) in records storage. Events such as a power outage or a LAN failure can corrupt your database if it occurs while EDEExpress for Windows updates your records.

EDEExpress may not detect database corruption, so if your system behaves unpredictably (for example, you start getting database error messages), use the Repair Database Utility.

Running this utility weekly 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 the current size of the database.

## Compact Database

The compact database utility improves the performance of EDEExpress for Windows by optimizing the database (EXPRES90.MDB) file and reclaiming space on your computer's hard drive. As you add, modify, or delete records in EDEExpress for Windows, the database file can become fragmented.

Running this utility weekly makes the database files smaller and improves system performance.

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

## **Verify Database**

The verify database function checks for data relationship integrity in your database. If EDEExpress 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. Before using this utility, be sure you have hard drive space available at least equal to the current size of the database.

## Pell Module in EDEExpress, Version 5.3

EDEExpress for Windows, Version 5.3 activates Pell Disbursement functionality for providing the submitted amount, disbursement date, and special disbursements information to RFMS. In Version 5.2, we disabled the Pell Disbursement tab and the multiple entry option for the submitted amount and the disbursement date.

EDEExpress 5.3 allows you to submit data requests for:

- An Electronic Statement of Account (ESOA),
- A Batch Replacement,
- A Year To Date file for reconciling records in your database, and
- Multiple Reporting Response to identify students with origination and disbursement records at other universities.

RFMS sends system-generated files to notify you about:

- Students with a Verification W status, and
- Students who may not receive an award because of a potential overaward.
- Students who may not receive an award because of a concurrent enrollment at another university.

### Pell References on the Internet

The latest information about the Federal Pell Grant Program is available on the Internet at <http://www.ifap.ed.gov>. On this Web site we include:

- The latest information regarding RFMS and the 1999-2000 Federal Pell Grant process.
  - Look under Bookshelf, Pell Grant Process.
- Pell Payment Schedules
  - Look under Bookshelf, Dear Colleague Letters, By Dear Colleague Letter Type, By Type: P Documents, P-99-2 (JAN).

### Pell References in EDEExpress

- Pell Payment Schedules are located in Tools, Browse, Global, Payment Schedule.
- Information about EDEExpress Pell is located in Help, What's New for 1999-2000, What's New in Pell.

## Pell Enhancements

We made the following product enhancements to EDEExpress for Windows Version 5.3:

### Setup

We added Pell Security into the EDEExpress Global Security Groups Level.

You define your Reporting and Attended Campus profiles under Institution Setup.

The only defaulted values that populate new Pell Origination records are those associated with the campus flagged as the default institution in the Pell Institution Setup.

You can't delete a default institution unless you mark another institution as the default institution. A warning message displays if you delete the last and only institution record not flagged as a default institution.

We added a new field, Institution Disbursement Option, to the Institution Setup screen.

- The field indicates whether the Reporting Campus institution has Advanced or Just-In-Time funding.
- The option for Advanced or Just-In-Time cannot be blank; you must enter information here. Schools under Cash Monitoring and Reimbursement should choose '1' (Advanced) for the Institutional Disbursement Option on the Pell Setup screen.

We added a new command button under the Misc. Info section labeled "More Setup." On this screen you can add up to 15 Estimated Disbursement Dates.

You can enter up to 10 Costs of Attendance for a Reporting/Attended ID; however, you must have at least one Cost of Attendance.

We removed the following fields from the Institution Setup screen:

- Entity Number
- User-defined fields
- Number of Payments
- Payment Frequency
- Time Period
- Months in Which Payment Will Be Made
- All Months' fields

We replaced the Number of Payment Months field with the Number of Payment Periods in Student's School Year field.

We lengthened the Zip Code field in Institution Setup to allow the four-character extension.

## **Entry**

We divided the Pell module into two tabs: Origination and Disbursement.

- You use the Pell Origination tab to add information that establishes the student's Pell eligibility.
- You use the now-activated Pell Disbursements tab to define Disbursement records and send them to RFMS.

EDEExpress uses the Pell Payment Schedule to determine the award amount (Total Payment Ceiling) based on the student's enrollment status, EFC, and COA. (See #5 for the Low Tuition Alternate Schedule.)

The government increased the maximum Pell award to \$3125 and the maximum EFC to 2925.

EDEExpress uses Formula 5, Academic Calendar 6 for the half-time schedule. For Formula 5, Academic Calendar 1-4, if the student is enrolled at least half-time, EDEExpress uses the half-time schedule. Otherwise, EDEExpress uses the less than half-time schedule.

The low tuition and fees flag range is 1 = 0, 2 = 1-106, 3 = 107 – 212.

- However, if you select one of these flags in entry, EDEExpress does not calculate the low tuition and fees award amount (Total Payment Ceiling). You must view the low tuition and fees table in the help text and manually enter the correct award amount in the 'Award Amount for the entire school year:' field.
- The Total Payment Ceiling does not display if a low tuition and fees flag is selected.

Scheduled Award (RFMS) remains empty on the Entry screen until you import an origination acknowledgement. EDEExpress displays the amount sent from RFMS.

The Secondary EFC Code can have three different values:

- O – Pell previously based on secondary EFC and now based on original EFC,
- S – based on secondary EFC, and
- BLANK if secondary EFC is not used.

If the estimated disbursement dates are not in your disbursement setup, you must fill in the information on the entry screen for the student record.

We added an estimated disbursement date grid with 15 possible date fields. The Estimated Disbursement Date and Disbursement Date range is 06/21/1999 – 09/30/2005.

We disabled the EFC and the Secondary EFC after you import ISIR data into Pell.

The software automatically defaults to the associated EFC value, Secondary EFC, Pell Verification Status, and Institution Verification from the ISIR. If you change the transaction number on a saved or acknowledged origination record, you must export a new origination record with the new transaction number to RFMS.

You can add a manual transfer record for the student to prevent overawarding that student, if you have a Financial Aid Transcript or NSLDS data and know a student has received a Pell award from another school.

When you create a manual transfer record via the Transfer dialog box, you must add the scheduled award, total amount of disbursements, and enrollment date.

You move through Pell origination and multiple transfer records for a given student SSN by using the scroll bar.

Using the Pell Disbursement tab, you can:

- Enter disbursement records for a student by adding records,
- Submit positive or negative amounts and enter in dollars and cents, and
- View the submitted, accepted, and Year-to-Date disbursement amounts.

When you add a Special Disbursement record, EDEExpress prefills some data fields on the Special Disbursements tab from information you entered on the Origination tab.

We changed the Origination/Disbursement status code used to indicate a rejected record. It is now “E” (Error), instead of “R” (Rejected).

We added two new fields to the Disbursement tab’s Multiple Entry function: Disbursement Submit Date and Disbursement Submitted Amount.

Required fields display in either yellow or gray with a yellow border depending on your computer’s color palette setting. If the color palette is set for high (higher than 256) or true color, the required fields display in yellow. If the color palette is set for 256, the required fields display in gray with a yellow border.

We added a record level view: View/ED Flags displays the Department of Education flags regarding Verification W, Concurrent Enrollment, and Potential Overaward Payments.

We added two fields to the View menu of an open Pell record: Eligibility Used and Processed Edits/Comments.

We added a warning message display if Award Amount for the Entire School Year is zero (0).

You cannot update Pell origination records to a "ready to send" status while the enrollment status is blank on the record. You also cannot update your Pell origination records to “ready to send” status through multiple entry.

## Edits

We added Edits 1520 and 1530.

- If Institution Disbursement Option from Setup is Just-In-Time and the current date is greater than five days before the disbursement date, EDEExpress displays an error message.
- If Institution Disbursement Option from Setup is Advanced and the current date is greater than 30 days before the disbursement date, EDEExpress displays an error message.

We added Edits 1104, 1105, 1106, and 1107.

- If Credit/Clock hour fields are used, then both fields must be filled or both must be blank. The same rule applies to Weeks of Instructional Time.

We added Edit 1535.

- Enrollment status is required for Payment Methodologies 1, 2, 3, and 5.

We modified Edit 1102.

- For Payment Methodologies 2, 3, 4, and 5, the valid range for Weeks in Program Academic Year is 30-78.

We replaced Edit 1510 with Edit 1450.

- Total Disbursement Amount Exceeds Award Amount for Entire School Year.

We removed Edit 1103 because it is a duplicate of Edit 1006.

We removed Edit 1500 that checked whether the disbursement date is more than 10 (N) days prior to the estimated disbursement date.

## Import

You can select the External Disbursement Add Import option.

You can create Origination through manual entry, ISIR import, or importing external origination data. Only one transaction imports per attended campus.

EDEExpress does not overwrite existing Pell origination records when importing ISIRs into Pell.

The most recent information imports into EDEExpress unless a transaction number is selected when importing ISIRs into Pell.

We removed the following import layouts:

- Payment Data-ISIRs
- Payment Data-External
- ISIR Data ASCII file
- Processed Pell Payment Data
- Batch Replacement
- SPS Data
- ED Initiated Potential Overaward
- Pell Verification W Data

We modified the processed date range on Import/Origination Data. ISIRs now import if you enter one target date for start and end range. For example, you no longer have to enter a range of 1/9/1999 as start date and 1/11/1999 as end date to import records with a processed date of 1/10/1999.

We replaced any references to Student ID with Origination ID where it is applicable. The Origination ID is a unique identifier that includes the following fields:

SSN	001010001-999999999
Name Code	XX
Year Indicator	2000
Valid Attended PELL ID	999999
Orig Sequence Number	00

## **RFMS Import**

New fields come from RFMS on the trailer record attached to Acknowledgement files. Totals print at the end of acknowledgement import edit reports.

- Number of Records Accepted and Corrected
- Number of Records Rejected

New Acknowledgement records are available in Version 5.3:

- You import disbursement/special disbursement acknowledgement records (message class PGDA00OP and PGSD00OP).
- The Import Edit report for the acknowledgement records displays the status code noting the processed results by RFMS.

The disbursement acknowledgement edit messages include Verification W data RFMS messages.

We added New Acknowledgement records in Version 5.3:

- Institution Data Acknowledgement and Data Request Acknowledgement records (message classes PGIA00OP, and PGRA00OP).
- EDEExpress prints an import edit report with processed results by RFMS.

An Import Statistics dialog box displays instead of the system printing an import edit report when you import an Electronic Statement of Account (ESOA) (message class PGAS00OP).

You can import Multiple Reporting Response (MRR) records from RFMS (message class PGMR00OP).

The PGTX00OP message class contains ED comments in a preformatted report.

We added new options to the Year-to-Date (YTD) Import dialog box. These include Compare & Print Exceptions Update (with option to select records), Print All, and Database Rebuild.

The YTD import (message class PGYR00OP) prints a report with Origination, Disbursement, and Summary information.

## **Export**

You can export origination data, disbursement data, institution data, and data requests (message classes PGOA00OP, PGDR00OP, PGRQ00IN).

EDEExpress updates the batch activity database with the appropriate information when exporting records.

You can make multiple data requests simultaneously. The software includes checkboxes for Data Request Types:

- Batch Replacement
- Multiple Reporting Response
- Electronic Statement of Account

- Year-to-Date records

We added a dropdown combo box that displays six Multiple Reporting Response types: OA, OS, OI, DA, DS, and DI.

We added a separate export options for Disbursements and Special Disbursements.

The Reporting/Attended Campus IDs marked as default institution in the Pell Institution Setup displays in the Export dialog box.

## **Print Reports and Lists**

We added additional record layout selections to the Print dialog box.

We added the following new reports:

- Origination Record
- Origination List: Default sort order is Reporting Campus/Attended Campus, Origination ID, and Name
- Disbursement List: Default sort order is Reporting Campus/Attended Campus, Origination ID, and Name
- Students by Payment Period
- 

We renamed the following reports:

- Transfer Data: Previously called Transfer Overaward Report
- List - Batch Activity: Formerly called Status of Batches
- 
- We carried over the following reports:
- Edits/Comment by Student
- ESOA
- Batch Summary
- SSN/Name Difference
- Record Layouts – All Pell Records

## **EDEXpress Printing**

We tested the following printers that are supported in Windows NT 4.0, Windows 95, and Windows 98:

- |                      |                     |
|----------------------|---------------------|
| • HP LaserJet IIIsi  |                     |
| • HP LaserJet 4      | • HP LaserJet 5M    |
| • HP LaserJet 4000N  | • HP LaserJet 5si   |
| • HP LaserJet 4M     | • HP LaserJet 5siMX |
| • HP LaserJet 4Mplus | • HP LaserJet 6MP   |
| • HP LaserJet 4si    |                     |

## Issues Fixed in EDEExpress, Version 5.3

We fixed the following configuration management issues per software module in EDEExpress for Windows Version 5.3.

### Global

- #1712 We added a Cancel button to the Database Verification dialog.
- #1743 The Update User ID fields are now available when creating a query.
- #1750 We corrected “Parent’s Amt from Wrksht #3” to read “Parent’s Worksheet B Results” in Application processing, EDEExpress query field listing.
- #1752 Documents deleted on the Docs tab no longer display on the tab.
- #1767 If you enter invalid field content into a field on the User Data tab and then try to exit the tab, the software will either allow you to remain on the tab to update the invalid content or to exit the tab with a “Changes Not Saved” message.
- #1786 We corrected the value help for Student and Parent Income Tax Form Filed in App Express query.
- #1796 The software no longer prevents you from opening a student record if you use the Docs tab.
- #1882 EDEExpress Version 5.3 stores any blank values on the ISIR as blanks within the database, allowing you to query ISIR fields for null values.
- #1914 System information prints a list of all loaded DLL modules.
- #1918 In previous versions, some of you experienced problems using EDEExpress and the FISAP software on the same workstation. We modified EDEExpress so that this problem no longer occurs.
- #1922 Documents marked “Required for Packaging” are no longer added to any student records that have a Packaging Status of H (Hand Packaged) or M (Manually Adjusted Package).
- #1940 The Packaging Ready Date on the Awards tab updates with the current date when all documents marked “Required for Packaging” for a student are set to Received or Waived.
- #1965 We removed references to the Referential Integrity Executable from the Help text.

### Application Processing

- #1675 You can choose any of the Parents’ Net Worth fields (Business, Investment, or Farm) when creating a user-defined format. The fields no longer appear twice on the printed record layout under differing labels.
- #1691 The software now prints assumed values instead of the entered values for Parents’ Assumed EIC, Assumed Student’s Worksheet B, and most financial fields when printing ISIRs.

- #1724 When printing ISIRs for a student with a Year in College of 6 (5<sup>th</sup> year/other undergraduate), the value no longer prints “3<sup>rd</sup> YR/OTHER.” When you enter a Year in College of 5 (4<sup>th</sup> year/senior) the software no longer prints “4<sup>th</sup> YR/SENIOR.”
- #1746 The software no longer changes a last name correction to blank on the SAR/ISIR tab after saving a DEMO correction for a student record with an ISIR on file .
- #1753 The software prints yes or no for values for the ISIR field “Have Driver’s License?” instead of 1 or 2.
- #1755 The software prints yes or no values for the ISIR field “Selective Service Registration Flag” instead of 1 or 2.
- #1756 The Student’s Date of Marital Status uses the date format MMCCYY.
- #1757 The software has been modified to print a leading “A” in front of the Alien Registration Number.
- #1774 If you process Renewal FAFSAs in EDEExpress for multiple institution codes, the records no longer reject due to a conflict between the first college choice on the student's RAD record and your setup's assumed institution.
- #1785 In EDEExpress, if when exporting corrections you manually change the institution code you are exporting for, the software no longer generates a "No records selected" message, even if you have created corrections for the concerned institution code.
- #1794 The import report for EDEExpress batch error files (such as SARE00OP and EAPR99OP) correctly displays the number of records in the import file in the "Total Records Accepted" field, and a zero value for "Total Records in Error."
- #1806 The Date of Legal Residence prints only if the student or parent answers "Yes" to the "Resident before 1/1/1994?" question.
- #1808 In the Process/Quick Correction option, a record lock no longer occurs if you click the Enter key after entering your corrections.
- #1827 You can now enter a negative value in Quick Correction for the fields "Father's Income Earned from Work" and "Mother's Income Earned from Work."
- #1828 The correction flags "#" and highlight flags "h" are printing on the correct lines when printing ISIRs.
- #1834 You no longer receive the error message "Report: Failed to open report record set. Reason: Syntax error in JOIN expression" when printing a List - Processed ISIRs report by entering multiple SSNs or by using an external SSN file.
- #1875 Queries using the parental field for "Residents before 1/1/1994?" now work correctly.
- #1910 Quick Correction now offers "4" ("Widowed") as a valid response to question #76 (Parental Marital Status).
- #1955 Assumed Worksheet Field B will populate and print the correct value for the amount for student and parent.

## Packaging

- #1609      Importing funds to a record at a Packaging Status of P (Packaged) will change the Packaging Status to M (Manually Adjusted Package) and update the last modified by date.
- #1610      If you start a batch package process and no records are ready to be packaged, the software displays a message of “No Records Selected” instead of a message of “No Current Record.”
- #1686      When printing Packaged Students by Fund Code, you can now print a list by a single Fund Code. The list also prints with a correct report header.
- #1788      If a record has not been saved to the database, the Awarded Funds dialog is disabled. You must save a new Packaging record before adding funds manually.
- #1792      Previously, if you set up multiple Aid Type G funds (Grants) in a methodology and packaged from within the student record, the software would in some cases not award the correct amount of grant aid. We corrected the software so that grant aid is properly awarded.
- #1813      We redesigned Multiple Entry to eliminate the software-generated error messages which occurred in previous versions when too many records were updated through Packaging Multiple Entry without using selection criteria.
- #1837      The software now automatically removes all awarded funds from the student record when the Packaging Results flag on the Awards tab is set to D.
- #1852      Values for Remaining Need are displayed correctly on the Packaging Record printout.
- #1858      Values for Enrollment Status are displayed correctly on the Packaging Record printout.
- #1860      All terms on the Award Letter will be properly aligned.
- #1865      A change to a student’s Academic Year Profile does not blank out all values in the Enrollment Status grid.
- #1902      EDEExpress 5.3 awards aid for all terms that a student is enrolled and is noted on the student’s record.

## Direct Loan

- #1714      An accepted promissory note status cannot be overwritten by a pending or rejected promissory note status. For example, if you attempt to import promissory note acknowledgements out of order, once the promissory note status is accepted, it cannot be overwritten by a pending or rejected status.
- #1716      The Disbursement Measurement Tools report was modified to list each borrower’s disbursements sorted by disbursement number and then by disbursement sequence number.

- #1717 &  
#1720 Several changes have been made to List Disbursements. Summary totals are now correct, “Q” transactions are included and the report title is correct. In addition, the actual disbursements are listed by disbursement sequence number.
- A separate Anticipated Disbursement List report gives you the option of printing either a list of anticipated disbursements with no corresponding actual disbursements or a list of anticipated disbursements with corresponding actual disbursements. To display records without corresponding actual disbursements, you select “Pending Actual Disbursements.”
- # 1771 When you select “F1” in Print Dialog, you receive Direct Loan help.
- #1862 &  
#1929 If actual disbursements exist for a loan, you cannot change the loan period code including External Import of a change record. Actual disbursements include actual disbursements adjusted to \$0.
- #1870 Actual disbursement date edits take into account any processed adjusted disbursement date transactions (“Q” transactions).
- For example: You enter an actual first disbursement with a transaction date of 09/01/1999. Then, a “Q” transaction is processed for the same actual disbursement with a new transaction date of 08/15/1999. You can now process a second disbursement for this loan with a transaction date of 08/30/1999.
- #1871 When you print promissory notes within Print Dialog, the pick list of loan records no longer include loans marked inactive within EDEExpress.
- #1892 When you print the promissory note manifest under the Export function, the system updates loan records and the Batch Activity Database with the Manifest Batch ID. Note: This Manifest Batch ID does correspond to the LOC generated Batch ID imported on a Promissory Note Acknowledgement.
- #1915 The system administrator can set a level of security to provide a “browse only” option. The “browse only” option does not allow a user to update a loan record.
- #1919 To accommodate the Origination Fee Reduction for Direct Subsidized and Unsubsidized Loans with a first disbursement on or after August 15, 1999, the loan percentages for Stafford and PLUS loans are now processed separately. You can select the origination fee percentage at both the default and loan record level.
- At the default level, you set an origination fee for Stafford and PLUS loans by entering Direct Loan Setup. Enter the correct fee percentage for your Stafford loans in the Stafford Fee field. You must also set the correct fee for PLUS loans using the PLUS Fee field.
- To set the origination fee for an individual loan, a new field, Fee Percentage, is located on the Loan Tab in the lower right hand corner. This option is available when the loan status is “N” or when you have adjusted a loan to \$0.
- #1930 You can now add additional anticipated disbursements to a loan record through the Import External Change process.
- #1946 You can now print the List – Actual Disbursement Report for a single student.

## **Pell**

- #1937 When updating a record using multiple entry, the software will not check for required fields before the record is updated.
- #1938 When entering a target processed date range in Import Origination Data – ISIRs, you can now enter a specific date.
- #1939 The software now defaults the system date into the begin and end date range fields on the print dialog box for the List - Batch Activity Report.
- #1972 When creating a query using the RFMS status, the software now allows you to enter the rejected status “E.”
- #1979 In Setup, you can enter a zero or a value in the cost of attendance fields.
- #1980 When importing a rejected Pell batch, the software renames the file to .bk and prints the import edit report.

# EExpress Benchmarking Tests

Benchmarking tests on Version 5.3 have been performed to measure its performance in varying processing environments.

## Imports Benchmarking Tests

The table below reports the benchmarking results for EExpress import files. We tested the Import process during normal working hours using different operating systems, PC platforms, and import files (all files had approximately 400 records). We conducted these tests on a Pentium 200 with 64 MB RAM. For the network tests, the EExpress software was on the workstation and the database was on the server. The server used is a production server with approximately 200 simultaneous users. From previous benchmarking activities, we have not seen a performance difference between the Novell 3.12 environment and the NT server environment. Thus, we list only the Novell network environment below. The Time Elapsed column indicates the measurement of time starting when you click OK in the Import dialog box and the import process begins.

Component	Operating System	BM Volume	Time Elapsed	Network
Pell – ISIR Import Add	WIN 95	1000 records	36 sec	N/A
Pell – ISIR Import Add	NT 4.0	1000 records	9 min 10 sec	Novell
Pell – ISIR Import Add	NT 4.0	1000 records	30 sec	N/A
Pell – ISIR Import Add	WIN 98	1000 records	39 sec	N/A

## Reports Benchmarking Tests

The table below reports the benchmarking results for EExpress reports and lists. We tested these reports in Windows NT, Windows 95, and Windows 98 on HP LaserJet III, 4, 4000N, 4M, 4M Plus, 4Si, 5M, 5Si, 5Si MX, and 6 MP printers. We conducted these tests on a Pentium 200 with 64 MB RAM. The Time Elapsed column indicates the measurement of time starting when you click OK in the EExpress Print dialog box and when the operating system (Windows NT/95/98) print dialog appears. The BM Volume is the number of records and approximate number of pages that were printed in the test.

Component	BM Volume	Operating System	Time Elapsed
Pell Disbursement List	Report	NT 4.0	2 seconds
Pell Disbursement List	Report	Win 95	2 seconds
Pell Disbursement List	Report	Win98	2 seconds
Pell Origination Record	Report	NT 4.0	2 seconds
Pell Origination Record	Report	Win95	2 seconds
Pell Origination Record	Report	Win98	2 seconds