
Installation Guide for

EDExpress for Windows

1999-2000

U.S. Department of Education



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Introduction

Preface

Thank you for selecting EDEExpress for Windows as your financial aid software package.

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

- Application Processing – Enter and edit initial applications, renewal applications, and corrections.
- Packaging – Package financial aid awards for your students.
- Direct Loan – Originate loans and print promissory notes.
- Pell – Process Federal Pell Grant data.

The first EDEExpress software release, Version 5.0, will be shipped with Application Processing and Packaging. Subsequent software releases will contain the other EDEExpress software modules (Direct Loan and Pell).

New for 1999-2000

EDEExpress has many improvements and changes. The improvements and changes related to the installation process include:

- EDEExpress is now a 32-bit application.
 - The 32-bit installation process only runs on Windows 95, Windows 98, or Windows NT (version 4.0) operating systems.
 - You should have, at a minimum, an IBM-compatible PC with a Pentium 200 MHz or better processor. Refer to the Hardware and Software Requirements section of this guide for additional information.
 - You will no longer need to modify your AUTOEXEC.BAT, CONFIG.SYS, and/or SWAP file settings.

- Selecting a Custom install allows you to install selected EDEExpress modules. You have the choice of installing Packaging, Direct Loan, and/or Pell. Be sure to read the Installation Process section carefully.
- After you have installed EDEExpress, you will see a new query icon for direct access to Query help. Enhanced query functions include pre-defined queries, ability to modify existing queries, and value help specific to the selected query field.

Refer to the What's New for 1999-2000 pull-down menu item under Help for a comprehensive list of product enhancements.

Along with the EDEExpress software package, you will find companion desk and technical references. Use the desk references to find step-by-step instructions for using the various functions of EDEExpress. Use the technical references to find record layout and technical information for building your own system.

EDEExpress Features

Integrated PC Software Package

EDEExpress 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 limiting user access
- Maintaining application databases
- Tracking the receipt of a student's documents
- Using online help for instructions on all software functions

Demographic Record

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

EDconnect

Important steps in processing financial aid information are sending and receiving data over the Title IV Wide Area Network (WAN). To accomplish these steps, EDEExpress works with the Title IV WAN telecommunication product EDconnect. EDconnect lets you send and receive data over the Title IV WAN. See the *EDconnect for Windows Desk Reference* for EDconnect software instructions.

Using This Installation Guide

Use the instructions contained in this Installation Guide to install the software on your computer or Local Area Network (LAN).

This guide also provides 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.

Help

Instead of a paper user's guide, EDEExpress has online help. General help is available from the menu bar, field help is available by pressing the F1 key, and help buttons are available on most screens. On the Application Menu Bar under the Help option, see the topic Using Help in the online help for more information.

System Requirements

Hardware and Software Requirements

The following hardware and software 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.
- 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, or Microsoft Windows NT 4.0).
- Monitor and video card capable of 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.

Optional Items to Consider

The following items are provided as additional tools to assist you in managing your financial aid data. Refer to Action Letter #2, dated October 1997 as well as Part VI of the Federal Register dated September 19, 1997.

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

- Internet Service Provider (ISP). An Internet service provider is necessary to access the “Info for Financial Aid Professionals” website (www.ifap.ed.gov). It is also necessary for submission of the Application for Approval to Participate in Federal Student Aid Programs (recertification, reinstatement, and changes).
- Netscape Navigator 3.0 or 3.01 (domestic) or web browser. This item is currently necessary in order to use FAFSA on the Web.
- Backup system (for example, a tape backup system) to store your data.

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.

EDconnect and NET*CONNECT are software products provided by the Title IV WAN.

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 70 MB.

Each software product requires the following space:

Product	Size
EDconnect for Windows	15 MB
EDExpress	16 MB
FISAP for Windows	4 MB
Quality Assurance Program for Windows with 300 records	2 MB
SSCR-32 with 300 records	6 MB

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

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

Local Area Network (LAN) Server Compatibility

LAN Server Compatibility

EDEExpress can be used as stand-alone or multi-user software. It can be run on the following network operating systems:

- Novell NetWare 3.x and 4.x
- Microsoft Windows NT Server

Users 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.

LAN Cautions

When multiple users are concurrently updating databases in the EDEExpress 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)
- Import ISIR Data
- Import RAD Data
- Repair Database
- Compact Database
- Database Verification

For each Utility function listed above, as well as RAD and ISIR delete functions, there should be no one else accessing EDEExpress.

LAN Messages

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, the user is 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, the user is 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, the user is returned to the menu bar.

Additional LAN Instructions

From the NetWare Server Console prompt, you should enter the following commands:

Set Maximum Record Locks Per Connection = 10000

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

LAN Hardware and Software Recommendations

The following hardware and software 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, or Microsoft Windows NT 4.0.
- *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 listed hardware or software requirements, please contact CPS Customer Service at 800/330-5947.

Installation Instructions

Installation Process

This section of the Installation Guide provides you with step-by-step instructions for installing EDEExpress. Instructions are provided for both stand-alone and network system installation.

Other topics include:

- Install Log creation
- Uninstall instructions
- Changing the database path from the EDEExpress application

Depending on the type of install you are performing (stand-alone or network), all installation diskettes may not be required.

Follow the prompts provided by the software when installing EDEExpress.

Directory Creation

The installation process automatically creates the directory:

C:\PROGRAM FILES\EDESUITE\EDEExpress for Windows

for EDEExpress 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 EDEExpress software update you may receive.*

If you are installing on a LAN, be sure to install to a LAN drive and not to a local drive.

Program Folder

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

Installing EExpress on a Stand-Alone System

EExpress consists of four software modules. They are:

- Application Processing
- Packaging
- Direct Loan
- Pell

The first software module listed, Application Processing, is automatically installed during the installation process. In addition to application processing functionality, this module contains all of the basic “global” setup options (for example, security) for all modules that you need to complete prior to processing your Title IV financial aid data with EExpress.

The first EExpress software release, Version 5.0, will be shipped with Application Processing and Packaging. Subsequent software releases will contain the other EExpress software modules (Direct Loan and Pell).

Installation Options

You can install EExpress using one of two options:

- **Full.** Use this option when you are installing EExpress for the 1999-2000 award year for the first time and want all EExpress software modules installed. See the Full Versus Custom Install section on the next page for more information.

Warning: Use caution when using the Full install option. The program will overwrite/remove/erase ALL your existing EExpress database (*.MDB) and program (*.EXE) files as well as any annotations you may have made to help.

- **Custom.** Use a Custom install in one of two ways.
 - If you have already installed a full version of EExpress, 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).
 - If you only want to install certain EExpress software modules other than the Application Processing module (*whether or not this is the first time you are installing the software*), use this option to select any or all of the remaining EExpress modules: Packaging, Direct Loan, and/or Pell.

Follow the prompts provided by the software when installing EExpress.

Full versus Custom Install

By selecting a Full install, you will be installing all available software modules (Application Processing, Packaging, Direct Loan, and Pell). Selecting a Custom install allows you to install selected EDEExpress modules. You have the choice of installing Packaging, Direct Loan, and/or Pell.

Reminder: The first EDEExpress software release, Version 5.0, will be shipped with Application Processing and Packaging. Subsequent software releases will contain the other EDEExpress software modules (Direct Loan and Pell).

Installation Steps

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

1. Turn on your computer 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 command line and click **OK**.

The software is installed to the default directory C:\PROGRAM FILES\EDESUITE\EDEExpress for Windows, unless you choose another location.

6. Insert diskettes in numerical order and click **OK** when prompted.

Follow the prompts provided by the software.

EDEExpress asks you a series of questions during the installation. Each question has a default answer.

If the default is correct, click **Next** in response to each question.

Or

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

When it is finished installing the files for EDEExpress, the installation program updates your Start menu. It will not, however, create desktop icons/shortcuts or update them if they have already been created.

Installing EDEExpress on a Network

When you perform a workstation installation, the executable file for EDEExpress (EXPRES90.EXE) installs 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 below to install EDEExpress on local area networks.

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

Instructions for Schools that Already Have EDEExpress Installed on a Network File Server

1. **Do not use the Network Server installation option for this version of the software.** The **Network Server** installation option is only for users installing EDEExpress to a network file server for the first time. Choosing this installation option installs an empty EXPRES90.MDB (EDEExpress database files) on the network file server, overwriting any existing database. Full and Custom are no longer choices for installation type in a network server installation.
2. **Do Full workstation installations on all workstations for this version of the software.** Choose the Network Workstation installation option, then select **Full**. The Full option installs the executable file (EXPRES90.EXE) in a local hard drive directory. The Workstation installation option prompts you for the location of the database installed during the EDEExpress Network Server installation.

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

Instructions for Schools that Are Installing EDEExpress on a Network for the First Time

1. **First, use the Network Server installation option to install this version of the software.** This option installs only the EDEExpress database (EXPRES90.MDB) on the file server, not the EDEExpress program files.
2. **Then, do Full workstation installations on all workstations for this version of the software.** Choose the Network Workstation installation option, then select **Full**. The Full option installs the executable file (EXPRES90.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 1).

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

Instructions for All Schools

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 eight diskettes, then create eight directories on the file server, etc. In the preceding eight diskette 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

\Install\DISK7

\Install\DISK8

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 EExpress 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.

Install Log

Each time an installation is performed, an Install Log is created. The information that will be 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\EDEExpress for Windows directory (or the location you specified during the Installation Process).

Example:

<APP NAME>	EDEExpress for Windows
<VERSION>	5.X
<TYPE>	Stand Alone Full
<SUMMARY>	New release
<TARGET>	C:\PROGRAM FILES\EDESUITE\EDEExpress for Windows
<DATE>	02-02-1999
<TIME>	08-36-54

Changing the EDEExpress Database Path

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

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

1. Open EDEExpress and select **Help, System Information**.
2. Click the **Files Information** tab.
3. Click the **Registry** button.

A Registry Viewer application is displayed with a split view. In the left window, you will see a tree-view style window, and in the right window, you will see a list-style window with two fields: Name and Value.
4. From the left window, single left click on the plus sign (+) next to EDESuite.
5. You will see a label indicating the software's year cycle under EDESuite. Single left click on the plus sign (+) next to Year90.
6. You will then see a label indicating the software's name. Single left click on the plus sign (+) next to Express.
7. Next you will see a listing of labels indicating the software's module. Single left click on the plus sign (+) next to module you want.
8. From the right window, find Database under the Name field, and right single click it.

9. From the pop-up window, select **Edit**.

You can also access this function by selecting **Edit, Edit**. (Make sure the List-style window has the focus before you do so; this action should be highlighted from Step #8 above.)

A Value dialog is displayed with two edit boxes. One box is labeled with Name (which is disabled), and the other box is labeled with Value.

10. Enter your new Database path in the entry box next to Value.
11. Press **Enter** or click **OK**.
12. Exit the Registry Viewer.
13. Click **OK** to exit the System Information box.
14. Exit the EDEExpress software.
15. The next time you start EDEExpress, you will be connected to the new Database.

Uninstall

After you have installed EDEExpress, you will see an icon for the Uninstall utility.

By double clicking on Uninstall, the utility 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 will delete all EDEExpress files and icons.

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**:

1. Double-click on the Uninstall icon.
2. A prompt asks if you are sure that you want to completely remove the application and all of its components.
3. Click the Yes button.
4. Click **OK**.
5. Click **OK**.

Note: EDEExpress may also ask you additional questions during the uninstall process. Click either **Yes** or **No** in response to these questions.

Getting Started

Logging In for the First Time

The first time you *start* EDEExpress, you will 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 Institution Code. See the following section, Setting your Assumed Institution Code, for step by step instructions. Click **Close** or press **Enter** to close the Startup Information box.

Each time you start EDEExpress, you must enter a valid user ID and password. EDEExpress requires user IDs and passwords for system security.

The first time you use EDEExpress, enter **SYSADMIN** for both your user ID and password. SYSADMIN is the password included with EDEExpress. You will then be prompted to enter a new password.

Follow the steps below to log in to EDEExpress for the first time and establish your new user ID and password.

To log in and establish your new user ID and password:

1. The first time you use EDEExpress, 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 will be prompted to type a New Password.
3. Press **Enter** or click **OK**.
4. Type a New Password and Verify Password.
 - Up to eight (8) alphanumeric characters may be entered.
 - The Password and Verify Password must be the same.
5. Press **Enter** or click **OK**.

After you enter your new password, set up your Assumed Institution Code. See the following section, Setting Your Assumed Institution Code, for step by step instructions.

Resetting Your User ID and Password

If you forget your password, you can reset the SYSADMIN user ID and password by performing the following steps:

1. Turn on your computer and start Microsoft Windows.
2. Insert the “last” EDEExpress installation disk.
3. Select **Start** from the Task bar.
4. Select **Run** from the Start pop-up menu.
5. Type **A:RESETPW.EXE** at the command line and click **OK**.
6. At the Reset Password box that appears, click the **Reset Password** checkbox.
7. Click **OK**.

This action will not affect your databases. See the previous section, Logging in for the First Time, for instructions on how to log in and establish your new user ID and password.

Call CPS Customer Service at 800/330-5947 for assistance.

<p>Note to Windows NT Users: In order to reset your user ID and password using the steps described above, you must have Windows NT administrator access rights.</p>
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Setting Your Assumed Institution Code

The first time you use EExpress you will see the warning: ***Assumed Institution Is Not Defined***. You will next need to set your Title IV institution code in EExpress as the assumed institution code.

Follow the steps below to set your assumed institution code.

To set your assumed institution code:

1. Select **Tools, Setup, App Express, System**.
2. Click the **Assumed Institution field** and type in your institution code. Proceed with Step 7.
3. If you do not know your institution code, click the ellipsis button to the right of the field.
4. Click **Code, Name, or State** to sort the institution record list. To sort the institution list by state, click the **down** arrow to select the state code from a list or type the code in the box.
5. Click **OK** to retrieve the institution code list. Use the **scroll bars** to locate your institution in the list.

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

6. Click on your institution, then click **OK** to select it. EExpress displays the record for your institution in the **Assumed Institution** field.
7. Click **OK**.
8. Click **Yes** to save the record.
9. Click **OK**.

Getting Help

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

- Review installation instructions
- Become familiar with your PC
- Contact your system administrator
- Use EDEExpress Online Help
- Call CPS Customer Service

These approaches are described below.

Review Installation Instructions

If you have problems installing EDEExpress, review the installation instructions again. See if you left out a step. Try the installation process again.

Become Familiar with Your PC

If you have 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 change your files.

Contact Your System Administrator

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

EDEExpress Online Help

Using Help is simple. You can get 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.

CPS Customer Service

If you need technical support, call CPS Customer Service at:

800/330-5947

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

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

CPS@NCS.COM

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

Example:

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

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

You will then be presented with a menu of options.

Choose the area appropriate to the information or assistance you need:

Menu Option	Description
1	CPS Automated Customer Service Center is an automated system through which you can check the status on batches and applications, request faxable materials and information, and obtain other needed data, such as reject, comment, and assumption code definitions.
2	Application Processing – Representatives assist you with installation and software questions.
3	Direct Loan – Representatives assist you with installation and software processing issues. Representatives also assist you with questions on the Direct Loan Technical Reference.
4	Pell Payment – Representatives assist you with installation and software questions.
5	SSCR – Representatives assist you with installation and software questions.
6	Quality Assurance Program for Windows – Representatives assist you with installation, software, and program questions.
7	Packaging – Representatives assist you with installation and software questions.
8	FISAP for Windows – Representatives assist you with installation, software questions, and technical issues.

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

- The version of EDEExpress you are using (under Help/About ...).
- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, type of memory management being used, etc.).
- The exact wording of any error messages you have received, as they appeared on your screen.
- A detailed description of the utility or function you were running when the error occurred, what module of the software you were working in (Application Processing, Direct Loan, Packaging, or Pell), and the steps you took to get to that utility or function.
- A description of any resolution steps you took prior to calling.