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Installation Guide for

# Quality Analysis Tool for Windows

2002-2003

U.S. Department of Education



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# Introduction

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## Preface

The Quality Analysis Tool for Windows 2002-2003 (QA Tool) software focuses on *initial* and *paid on* ISIR data. These two transactions are presented side by side for you to see and compare the fields that were corrected. Using Estimated Family Contribution (EFC) ranges and increments of change, you can analyze a specific student population to determine which fields were corrected most often and how those changes affected the students' EFCs.

See the “What’s New for 2002-2003” pull-down menu item under **Help** for a comprehensive list of product enhancements.

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## QA Tool Features

The features of QA Tool are:

- Custom Reports
- Export
- File Management
- Import
- Print
- Query
- User Database

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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 instructions.

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## Help

### Online Help

Instead of a paper user’s guide, QA Tool has online Help.

General help is available from the menu bar and field help is available by pressing the F1 key.

See the “Use QA Tool Online Help” section in this Installation Guide and the “Using Help” topic in the online Help for more information.

## CPS/WAN Technical Support

For questions regarding technical assistance, software functionality, and ISIR/custom file layouts call CPS/WAN Technical Support at:

**800/330-5947**

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

or e-mail CPS/WAN Technical Support at:

**[cpswan@ncs.com](mailto:cpswan@ncs.com)**

For all other program or policy questions, call one of the following contacts from the Quality Assurance Program:

<u>Contact/Regions</u>	<u>Phone</u>	<u>E-mail</u>
Holly Langer-Evans/1,2,5	617/223-9603	<a href="mailto:holly.langer-evans@ed.gov">holly.langer-evans@ed.gov</a>
Francine Reeves/3,4,6,7	404/562-6289	<a href="mailto:francine.reeves@ed.gov">francine.reeves@ed.gov</a>
Michael Cagle/8,9,10	206/615-2586	<a href="mailto:michael.cagle@ed.gov">michael.cagle@ed.gov</a>

See the topic “CPS/WAN Technical Support” in the online Help for more information.

## Sources of Assistance for Schools

*Sources of Assistance for Schools* is a new document that contains helpful contact information for all Student Financial Assistance programs, including frequently called help lines, e-mail addresses, and Web sites. You can download the *Sources of Assistance for Schools* from the SFAdownload Web site located at **[SFAdownload.ed.gov](http://SFAdownload.ed.gov)**.

# System Requirements

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## Single-User System Hardware and Software Requirements

The following hardware and software components are required for QA Tool:

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better
- 128 MB total memory or more
- 20 GB hard drive
- 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
- 24x CD-ROM drive with sound board
- Windows 95 keyboard (for example, IBM enhanced 101 or 102 keyboard)
- Microsoft compatible mouse
- Laser printer capable of printing on standard paper (8 1/2" x 11")
- 32-bit operating system (Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x or Microsoft ME). **Note:** Windows 2000 users must have power user permissions
- SVGA monitor and video card capable of Super Video Graphics Adapter (SVGA) (800 x 600) resolution (small fonts only) or higher. QA Tool 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 that supports 56K modem connection or higher. A connection to the Internet is necessary to access the Information for Financial Aid Professionals Web site located at [www.ifap.ed.gov](http://www.ifap.ed.gov), and the SFAdownload Web site located at [SFAdownload.ed.gov](http://SFAdownload.ed.gov).
- Microsoft Internet Explorer version 4.01, Service Pack 2 or higher, or Netscape Navigator Version 4.73 or higher.

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## LAN Hardware and Software Recommendations

The following hardware and software components are recommended for running QA Tool in a LAN environment:

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

**Note:** Windows 2000 users must have power user permissions.

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

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

- 16 megabit/sec transfer rate on the network for token ring, 10 megabit/sec transfer rate on the network for Ethernet, or the maximum transfer rate your network topology supports.
- Monitor and video card capable of SVGA (800 x 600) resolution (Small fonts only.)

**Note:** QA Tool 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 QA Tool.

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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:

- 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 79 MB.

Each software product requires the following space:

<b>Product</b>	<b>Size</b>
DL Tools for Windows	5 MB
EDconnect for Windows	15 MB
EDExpress for Windows	16 MB
FISAP for Windows	4 MB
Quality Analysis Tool for Windows with 300 records	4 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

# 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 QA Tool.

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 files may be required.

Other topics include:

- Downloading paper documentation and software from the SFAdownload Web site located at **SFAdownload.ed.gov**
- Creating the Install Log
- Changing the database path from the QA Tool software application
- Uninstalling the software

## Folder Creation

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

**C:\Program Files\EDESuite\Quality Analysis Tool 2002-2003**

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 folder.

**Caution:** If you change the folder location and name, you must change them with each QA Tool software update you receive.

## Program Folder

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

## SFAdownload Web site

You can download the QA Tool software, in two formats, from the SFAdownload Web site located at **SFAdownload.ed.gov**. You can download the entire software in one file, called **QATool20.exe**, or you can download the software in separate installments, which can then be copied to a network drive or diskettes. See the “Downloading Paper Documentation and Software from the SFAdownload Web Site” section for more details.

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

**Warning:** 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.

## Installation Steps at a Glance

Step	Action	Reference
1	Download the QA Tool software, from the SFAdownload Web site located at <b>SFAdownload.ed.gov</b> .	Read “Downloading Paper Documentation and Software from the SFAdownload Web site” for instructions.
2	Install the software.	Read “To Install the Software” for instructions.
3	Download supporting paper documentation from the SFAdownload Web site located at <b>SFAdownload.ed.gov</b> .	Read “Downloading Paper Documentation from the SFAdownload Web site” for instructions.

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## Downloading Paper Documentation and Software from the SFAdownload Web Site

You can download the software and the related user documentation from the SFAdownload Web site located at **SFAdownload.ed.gov**. This site was created to help you access financial aid tools (for example, software and paper documents) for easier and more efficient use of QA Tool.

### 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 kbps 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 kbps	18 min.	1 hour, 28 min.	2 hours, 58 min.
14.4 kbps	12 min.	59 min.	1 hour, 58 min.
28.8 kbps	6 min.	30 min.	59 min.
33.6 kbps	5 min.	25 min.	51 min.
56 kbps (53 kbps)	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.

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## Downloading Paper Documentation from the SFADownload Web Site

You can download the paper documentation, in either Adobe PDF or Microsoft Word format, from the SFADownload Web site located at **SFADownload.ed.gov**.

The following types of paper documentation are available to download for QA Tool:

- Cover Letters
- Installation Guides
- Technical References
- Desk 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 located at **SFADownload.ed.gov**.
2. Click on **References and Documentation** button on the left-hand side of the screen.
3. Click **QA Tool 2002-2003** to the left of this description. You are taken to the download site.
4. Scroll down to Service release or Full version documentation
5. 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 As**, choose a location to save the file, and press the **Save** button.

6. 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.
7. Once the paper document has been downloaded on your hard disk, go to the location and double click on the file to open and/or print it.

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## Downloading Software from the Web

You can download the QA Tool software and the related user documentation from the SFAdownload Web site located at **SFAdownload.ed.gov**. The software is available in two formats. You can download the entire software package in one file (QATool20.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 located at **SFAdownload.ed.gov**
2. Click on **Software** button on the left-hand side of the screen.
3. Click **QA Tool 2002-2003** to the left of this description. You are taken to the download site.
4. Click the **Full Download** link to download the program that allows you to do the full installment. A **Save As...** dialog box appears.
5. 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.
6. Once the file is downloaded to your hard drive, go to that location and double click **QATool20.exe** to extract the file and install the software.

**Note:** 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 located at **SFAdownload.ed.gov**.
2. Click on **Software** button on the left-hand side of the screen.
3. Click **QA Tool 2002-2003** to the left of this description. You are taken to the download site.

4. 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.

5. Click **Disk 2**. When the **Save As...** dialog box appears again, save **Disk 2** to the same location as you saved Disk 1.
6. Click each succeeding disk until they have all been saved to the same location on your hard disk.
7. 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.

**Note:** See “To Install the Software” for additional instructions.

# Installing the Software on a Single-User System

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## Installation

Downloading the software from the SFAdownload Web site located at **SFAdownload.ed.gov** does not install it. After downloading the software to your hard drive, you must install it. For installing the software on LAN, see "Installing the Software on a Network" section in this guide.

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## Installation Options

You can install the software using one of two options:

1. **Full.** Use this option when you are installing QA Tool for Windows 2002-2003 for the first time.

**Warning for Subsequent Installations:** Use caution when using the Full installation option. The program overwrites, removes, and erases your existing QA Tool database (QAT23.mdb) and all program files including (QAT32\_23.exe), as well as any annotations you may have made to online Help.

2. **Custom.** Use a Custom installation in one of two ways.
  - If you have already installed a full version of 2002-2003 QA Tool, you can use this option to add a particular file or files; for example, executable (\*.exe) files, database (\*.mdb) files, and help (\*.hlp) files. This option leaves all other database and system settings intact (unless you select \*.mdb files).
  - To upgrade the software, choose Custom installation and select all files except your existing database files (\*.mdb); for example, QA Tool version 2.x. This is the Custom default selection.

## Steps to Install:

1. Be sure all Windows applications, including screen-savers and e-mail notifiers, are closed.
2. If you downloaded the QATool20.exe file from the SFAdownload Web site, go to the location of that downloaded file.
3. Double-click the file to open and/or install it. The file decompresses itself into a temporary folder (usually “c:\temp”) and continues the install from there.
4. QA Tool 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 would like to overwrite a read-only file when installing the software.

- If the default answer is correct, click **Next** to go to the next screen.
  - You can change the default answer, if you want. If you do, make sure you know the folder where the software is located.
5. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.
  6. When the installation program is finished installing the files for QA Tool, 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.

**Note:** See “Installing QA Tool on a Single-User System” and “Installing QA Tool on a Network” sections of this installation guide for more information.

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## 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. If there are no updates to the database, this update will not occur.

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

# Installing the Software on a Network

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## Installation

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

- If you are installing the initial QA Tool, do a full installation and follow the steps provided in the “First Time Network Installation” section.
- If you are installing QA Tool after you have created data in the database, follow the instructions provided in the “Subsequent Network Installation” section.

When you perform a workstation installation, the executable file for QA Tool (QAT32\_23.exe) and all other program files are installed to a workstation’s local hard drive.

The installation modifies all QA Tool 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 QA Tool 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 QA Tool 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.

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# First Time Network Installation

## To Install the Software on a Network for the First Time

1. First, use the Network Server installation option to install only the QA Tool database (QAT23.mdb) on the file server, not the QA Tool program files.
2. Enter the Network server location where you want to install QA Tool for Windows, version 2.0 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 (QAT32\_23.exe) in a local hard drive folder.

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\EDESuite\Quality Analysis Tool 2002-2003** or some other local designation.

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## Subsequent Network 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, QA Tool version 2.x. The Network Server installation option is only for users installing QA Tool to a network file server for the first time. Choosing this installation option installs an empty QAT23.mdb (QA Tool database file) on the network file server, overwriting any existing database.
2. Click on the **Network Workstation** installation option.
3. You are then prompted for the location of your QAT23.mdb during the QA Tool 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 QA Tool for that workstation. When the first user logs into QA Tool, the update runs. Subsequent installations will not update the database again.
5. Follow the prompts provided by the Setup program.

### To Install Subsequent and Future Releases

For this version and all other future releases of QA Tool, you must do a **Custom** workstation install to ensure the database structure is updated. Follow the instructions for “Subsequent Network Installation.”

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# 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 folder for each diskette folder download. For example, if you download four diskettes, then create four directories on the file server; if you download six diskettes, then create six directories on the file server; if you download nine diskettes, then create nine directories on the file server, etc.

In the following four diskettes example, you would create a folder structure like this one on your server.

Example:

\Install

\Install\DISK1

\Install\DISK2

\Install\DISK3

\Install\DISK4

\Install\DISK5

\Install\DISK6

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

2. Copy the contents of each disk into its corresponding folder on the server.
3. You can now install QA Tool from the file server by running **SETUP.exe** from the DISK1 folder on the server instead of carrying the diskettes to each workstation.

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## LAN Server Compatibility

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

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

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

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

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

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

**Warning:** 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 QA Tool 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

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 QA Tool.

## 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 do this, log on to the NT server console, then:

### **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.

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

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

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

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

All users must have Change (to delete, create, execute, read, and write) or higher permissions to access both the QA Tool 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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## 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/folder, date, and time of install. This file is named `INSTALL.log` and is located in your **C:\Program Files\EDESuite\Quality Analysis Tool 2002-2003** folder (or the location you specified during the Installation Process).

**Example:**

<APP NAME>	Quality Analysis Tool 2002-2003
<VERSION>	2.X
<TYPE>	Stand Alone Full
<SUMMARY>	New release.
<TARGET>	C:\Program Files\EDESuite\Quality Analysis Tool 2002-2003
<DATE>	03-02-2002
<TIME>	08:36:54

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## Changing the QA Tool Database Path

You can change the QA Tool database path from in the QA Tool version 8 software.

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

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

1. Open QA Tool 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 “Year23” 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 Year23.
  - 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 (QAT23.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 QA Tool software.

The next time you start QA Tool, 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 QA Tool Window.

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## Uninstall

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

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

### *To Uninstall QA Tool for Windows 2002-2003*

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**.

QA Tool 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 QA Tool, 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 QA Tool. Instructions for all of these tasks are provided within this section.

### Startup Information Box

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

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

1. The first time you access QA Tool, 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 QA Tool, you must enter a valid user ID and password. QA Tool requires passwords for system security.

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

1. Type in the default user ID. **SYSADMIN** is the default user ID.
2. Type in the default password. **SYSADMIN** is the default password.
3. Type your **new password** in the New Password text entry box. You must change the default password by typing a new one in this field.
  - Up to eight (8) alphanumeric characters may be entered.
4. Type the **new password** again in the Verify Password field.
  - The Password and Verify Password must be the same.
5. Click **OK** to log in.
6. Use the **new password** the next time you login.

**Note:** The SYSADMIN user ID should be reserved for the systems administrator. All other users should have a unique user ID.

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

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## **Resetting Your User ID and Password**

If you have forgotten your password, you can have your QA Tool for Windows administrator give you a new one using the Security Users function from the menu bar.

### ***To Access the User Security Function***

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

If you are the QA Tool for Windows administrator and you have forgotten your password, call CPS/WAN Technical Support for help with resetting the default user ID and password to SYSADMIN.

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

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# Steps in the QA Tool Process

## Step 1: Setting Up the Software

You must use the **System** option under **Tools, Setup** to define general system information before you can import and analyze data. You may also want to create some custom formats to help you extract the specific data you need.

Security functions are also available under Setup. These options allow the QA Tool administrator to create user IDs and select the functions that each user ID can access.

### ***System Setup***

From the main menu bar select:

- **Tools, Setup, System**
- **Tools, Setup, Verification Edit Profile**
- **Tools, Setup, File Management**
- **Tools, Setup, User Database**

### ***Custom Formats Setup***

From the main menu bar select:

- **Tools, Custom Formats, Custom Reports**
- **Tools, Custom Formats, Selected Fields**
- **Tools, Custom Formats, Field Increments**
- **Tools, Custom Formats, EFC Ranges**

### ***Security Setup***

From the main menu bar select:

**Tools, Setup, Security Users**

## Step 2: Importing Data

When you have defined your system settings, the next step is to import your data.

### *Import Data*

From the main menu bar select:

- **File, Import**

## Step 3: Validating Data

Data Validation is a process that deletes unmatched records from the database. When you have imported your data, you must validate it before you can analyze it.

### *Validate Data*

From the main menu bar select:

- **Process, Data Validation**

## Step 4: Selecting for Verification

In this step, you use verification edit profiles you design to find student records that meet your school's verification criteria and to flag those records for verification.

This step is not required, but it can help you more accurately:

Identify verification errors that occur at your school

Identify and use verification practices that make a difference in aid awards

Identify and eliminate time-consuming verification practices that make little or no difference in final awards

## Step 5: Analyzing Data

QA Tool allows you to compare the Initial and Paid On transactions side by side on the Transaction Comparison tab. For each ISIR, you must set the Initial School Verification flag to indicate that the Initial ISIR matched the criteria for your school's verification process.

You can also view data in user-defined fields on the User Database tab. In the Print function, you will find reports that compile the data in a variety of ways, as well as Custom Reports that include only the data you specify.

### ***Analyze Data***

From an open record click:

- **Transaction Comparison tab**

**Note:** You can choose to see all fields, or you can choose a specific group of fields using **Selected Fields Codes** that you define in **Setup, Custom Formats, Selected Fields**.

### ***Print Reports***

From the main menu bar select:

- **File, Print**

# Getting Help

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## Basics

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

- Review installation instructions.
- Become familiar with your PC.
- Contact your system administrator.
- Use QA Tool online Help.
- Contact Technical Support.

These approaches are described in the succeeding sections.

## Review Installation Instructions

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

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

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

## Become Familiar with Your PC

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

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

## Contact Your System Administrator

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

## Use QA Tool Online Help

Instead of a paper user's guide, QA Tool 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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## Technical Support

### Contact SFA Technical Support

For SFA technical support, post an e-mail (including your telephone number) with your question to:

**[ed.gov/offices/OSFAP/sfatech/listserv.html](http://ed.gov/offices/OSFAP/sfatech/listserv.html)**

Department staff or the financial aid partner responsible 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. For information on how to subscribe to SFATECH go to:

**[ed.gov/offices/OSFAP/sfatech/listserv.html#subscribe](http://ed.gov/offices/OSFAP/sfatech/listserv.html#subscribe)**

### CPS/WAN Technical Support

If you need technical support, call CPS/WAN Technical Support:

**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/WAN Technical Support:

**[cpswan@ncs.com](mailto:cpswan@ncs.com)**

## ***Guidelines for Calling Technical Support***

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

- Your TG ID. (ID starting with TG followed by a 5-digit number starting with 5, 6, or 7.)
- The version of the software you are using (under Help/About QA Tool 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/WAN Voice Response System***

The CPS/WAN Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to enter the last five digits of your TG ID.

Example:

For TG50001, enter 50001

For TG60001, enter 60001

You are then presented with a menu of options.