June 2018

RE: Direct Loan Tools for Windows, Release 18.0

Dear DL Tools Users:

Federal Student Aid is pleased to announce the availability of William D. Ford Federal Direct Loan (DL) Tools for Windows, Release 18.0. DL Tools is a Windows-based application designed to provide the following functionality related to all Direct Loan schools' software:

- Compare the School Account Statement (SAS) to loans and actual disbursements recorded in EDExpress or an external file, and/or compare the SAS to the DL Tools Cash database.

- Print the SAS in a readable format.

- Track Cash Receipts (drawdowns) and Refunds of Cash.

- Rebuild your Direct Loan origination and disbursement records in EDExpress using an automated process.

- Run the Disbursement Measurement Tool Report to help monitor Direct Loan records in your EDExpress database.

Important Note: We redesigned the DL Tools software for 2018-2019 to implement enhancements that improve usability and increase security. See the "DL Tools Software Redesign" section and other sub-sections below for more information about new and revised functionality, including login guidance.

Note: Due to the software redesign, DL Tools was developed to process data for the 2018-2019 cycle only. In future versions, we will add functionality for each new cycle year, enabling DL Tools to assist you with Direct Loan tasks for multiple recent cycles.

All Direct Loan schools can use the SAS Compare and Cash Management functions. The Rebuild function can be used by schools to rebuild Direct Loan records in EDExpress for Windows databases. Non-EDExpress users can export data from a rebuilt EDExpress database to recreate non-EDExpress loans or databases. For information on creating file formats and exporting data from EDExpress to an external system, see Volume III of the *2018-2019 Common Origination and Disbursement (COD) Technical Reference*.

The Disbursement Measurement Tool Report (available in DL Tools if connected to EDExpress) and the List–Document Activity report (available in EDExpress) assist schools with monitoring current operations, procedures, and program status and can also help meet the Quality Assurance requirement in the Direct Loan program. Tolerances can be applied when running these reports. Tolerances are guidelines you set for evaluating the effectiveness of your school's Direct Loan processes and procedures.

Your school decides which DL Tools reports to use, when to run them, and what action to take as a result. You can use the reports to review progress as part of a continuous improvement plan.

If you do not use EDExpress, you can still use DL Tools to assist in reconciling Direct Loans. You can import cash, loan, or disbursement data from your external Direct Loan system into DL Tools and compare your data to the SAS. Fixed-length record layouts for each of these file types are included in Volume IV, Section 3 of the *2018-2019 COD Technical Reference*.

Important DL Tools Comparison Reports Note: DL Tools Loan and Disbursement Comparison Reports are designed to be run using the SAS with year-to-date (YTD) detail, *not* monthly detail. See Volume VI, Section 8 of the *2018-2019 COD Technical Reference* for information about default settings and SAS option selections. You can change your SAS options (YTD detail, for example) by accessing the COD Web site at cod.ed.gov.

About this Cover Letter

This letter includes the following information:

- Release 18.0 installation guidance

- Overviews of the DL Tools software redesign and new DL Tools Desktop

- A list of additional enhancements available in Release 18.0

- Release 18.0 software and user documentation download instructions

- Microsoft Windows Compatibility and Section 508 Compliance notices

- Contact information for technical support and additional assistance

Release 18.0 Installation

DL Tools, Release 18.0 is specific to the 2018-2019 award year only. If you require DL Tools functionality for award years prior to 2018-2019, use Release 17.0 or earlier DL Tools releases, which are available from the FSAdownload Web site.

To install Release 18.0, choose the Stand Alone Full installation option (for standalone PCs) or the Network Server and Workstation installation options (for PC workstations accessing a database stored on a network drive).

For more information on installing DL Tools Release 17.0, see the *DL Tools for Windows Release 17.0 Installation Guide*, available for download from the FSAdownload Web site.

DL Tools Software Redesign

We redesigned the DL Tools software for Release 18.0 to implement new software enhancements that improve useability and increase security. These enhancements, which mirror similar enhancements introduced in EDExpress 2018-2019, include:

- The DL Tools Desktop, which provides a multi-paned, dynamically updated view of key information and quick access to frequently used functions from the software's main screen. See the next section of this cover letter for more information.

- Reinforced security setup options and password requirements that help keep your DL Tools database and student data more secure.

- The ability to apply password protection any documents printed from DL Tools to an external file.

- The use of Adobe PDF (Portable Document Format) for all print options.

- Automatic archival, compression, and encryption of imported data files in a secure, easily accessible format.

- The ability to resize, minimize, and maximize window and Desktop pane sizes within DL Tools.

- Updated all date-related entry fields to standardize entry in MMDDCCYY format.

The DL Tools Desktop

New for Release 18.0! The DL Tools Desktop is a new navigation tool for 2018-2019, providing quick and easy access to frequently used functionality and critical information in a multi-pane format. Pending imports can be accessed directly from the Desktop. The Startup Information pane displays warning messages and other information that used to appear after logging in to DL Tools. The Favorites pane provides quick access to print functionality for the documents you generate most often in DL Tools. The Desktop also includes an RSS Feed with links to new and updated documents in What's New on IFAP, the IFAP calendar, or the latest IFAP podcasts.

Using the DL Tools Desktop is optional; you can show or hide the Desktop by selecting or clearing the **Show Desktop** checkbox in the Desktop Settings dialog box (**View**, **Desktop Settings**). The familiar DL Tools menu bar is available whether the Desktop is displayed or not. Desktop settings are specific to your DL Tools user ID.

See the sub-sections below for more information on settings and specific panes of the new DL Tools Desktop.

Startup Information Pane

The Startup Information pane of the DL Tools Desktop replaces the Startup Information dialog box that appeared in prior versions of DL Tools after logging into the software. The Startup Information pane displays informational messages regarding key DL Tools functionality, warnings about potential issues you might encounter, and alerts to errors and critical problems affecting your ability to start or use the software. For example, DL Tools might display a message in this pane to alert you that your disk space or available memory is low.

Favorites Pane

The Favorites pane of the DL Tools Desktop provides you with a quick shortcut to print functionality for the reports you generate frequently in DL Tools.

To designate DL Tools reports you print frequently as "favorites," click the star icon to the right of the report type in the Print or Compare dialog box. Reports marked as favorites appear automatically in the Favorites pane of the DL Tools Desktop. To remove the designation of a report as a favorite, return to the Print dialog box for the report and click the star icon again. If you want to remove all reports designated as favorites from the DL Tools Desktop, go to **View**, **Desktop Settings** and click **Clear Favorites**.

Pending Imports Pane

The Pending Imports pane of the DL Tools Desktop lists data files in your import data directory that have yet to be imported into DL Tools. You can choose to import or suppress each file displayed in the pane by clicking the corresponding button.

If you click the import button, DL Tools opens the import dialog box associated with the import type. You can then designate additional import options and settings and initiate the import process.

If you choose to suppress a specific data file or import type in the Pending Imports pane, DL Tools filters all future files with the same message class or the specified import type from the pane. You can clear these suppressions in the Desktop settings (**View**, **Desktop Settings**). Suppression settings are specific to your User ID and do not affect your ability to locate or import files directly from the DL Tools import dialog box.

Note: If your import data directory is located on a network and multiple DL Tools users in your office routinely import data files, note that the files listed in Pending Imports section change dynamically with each refresh of the Desktop to remove files from the list that have been imported by you or another user. Use the Desktop settings (**View**, **Desktop Settings**) to adjust the refresh rate for the Pending Imports pane and other Desktop panes.

Note: The security group associated with your user ID in DL Tools Security Users setup (**Tools**, **Setup**, **Security Users**) must have access to import functionality to use the Pending Imports pane.

RSS Feed Pane

The RSS Feed pane of the DL Tools Desktop enables you to display links to current information from Federal Student Aid's Information for Financials Aid Professionals (IFAP) Web site. Click the **Settings** button in the top right corner of the pane to access the RSS Feed Settings dialog box, where you can indicate whether you want the RSS Feed pane to display links to What's New items from IFAP home page, calendar items from the site, or IFAP podcasts. The title of the pane changes dynamically based on the IFAP RSS feed option you select in settings.

The information displayed in the RSS Feed pane is updated dynamically by DL Tools based on the refresh rate you select in the Desktop settings (**View**, **Desktop Settings**).

If you do not want the DL Tools Desktop to display the RSS Feed pane, clear the **Show RSS Feed** checkbox in Desktop settings (**View**, **Desktop Settings**).

Desktop Settings

Use the Desktop Settings dialog box (**View**, **Desktop Settings**) to show or hide the DL Tools Desktop. If you want to show the Desktop, set your refresh rate and RSS Feed preferences here. You can also use this dialog box to clear Desktop suppressions of items from the Startup Information and Pending Imports pane and to clear print and compare reports flagged as favorites for the Favorites pane. You must click **OK** for changes you make in this dialog box to apply.

Logging into DL Tools

When you first access the software after installation, the default User ID is SYSADMIN and the default password is **$y$tem Adm1n**. Be sure to include the space between **$y$tem** and **Adm1n** (the two parts of the default password).

After you enter the default user ID and password, DL Tools requires that you immediately define a new password for the SYSADMIN. Beginning with Release 18.0, new passwords must be a minimum of 12 characters and must include at least one uppercase letter, one lowercase letter, one number, and one keyboard character that is not a letter or number (such as an exclamation mark or other punctuation symbol). You can adjust the minimum password length and other requirements in the new Password Setup dialog box (**Tools**, **Setup**, **Password Setup**).

In addition, the SYSADMIN user ID now only provides access to critical administrative functions in order to limit its use for routine software tasks and improve your ability to trace actions taken in the software to specific users. DL Tools administrators at your school should create unique user IDs in Security Users setup with the necessary access and log into the software under those IDs for most software tasks they perform.

New for Release 18.0! Due to changes in minimum password requirements, user IDs and passwords established prior versions of DL Tools are not pulled forward to Release 18.0. You must recreate *all* user IDs and passwords in Release 18.0 based on the default or custom settings defined in the new Password Setup dialog box.

For more information on security setup, see DL Tools Help in the software and the *DL Tools Release 18.0 Installation Guide*, which is available on the FSAdownload Web site.

Release 18.0 Enhancements

The following additional enhancements are available in DL Tools Release 18.0:

General Changes

- **Program Year 2018-2019 Added** – We added DL Tools functionality and message classes applicable to program year 2018-2019.

- **DL Tools Print Update to Adobe PDF Format** – DL Tools now creates and stores all printed documents in Adobe Portable Document Format (PDF). You are not required to have Adobe software installed on your PC workstation to print or view DL Tools reports. However, you must have Adobe Reader (free software) or Adobe Acrobat (licensed software) and either product's associated Web browser plug-ins installed to use the Screen print option in DL Tools.

  If you do not have any Adobe products installed on your PC and you print a report to the Screen, DL Tools displays a warning message indicating it was unable to locate the appropriate Adobe browser plugin and offers the option of saving the report or attempting to open the report using your operating system's default viewer application.

- **Password Protection for Printing to File** – You can now apply password protection to DL Tools documents you print to a file. To use this new functionality, select **File** as the report destination, then enter the same password in the **Password** and **Verify Password** fields. DL Tools saves the password-protected file it creates in PDF format in the destination folder.

- **New Password Setup Enables Additional Security Requirements** – The new Password Setup feature (**Tools**, **Setup**, **Password Setup**) enables you to establish default parameters and requirements for passwords you define in Security Users setup (**Tools**, **Setup**, **Security Users**). The new password settings include minimum password length, minimum and maximum password age (measured in days), and password history length (measured in number of password resets). You can also test passwords in this dialog box to ensure they meet the parameters and requirements you define.

  Prior to establishing new user IDs and passwords in Security Users setup, we recommend you review the Password Setup dialog box with your technical staff and determine which default parameters and requirements you want to establish for DL Tools users at your school. You should consider how often you want your staff to change their passwords (minimum/maximum password age), how frequently they can re-use the same password (password history length), and the minimum length for each new password.

Disbursement Detail External Add (DLEXDISB)

- **Disbursement Date Range Updated for 2018-2019** – We updated import functionality for the Disbursement Detail External Add file (message class DLEXDISB) to only allow a date range of 6/21/2015 to 12/28/2022 for 2018-2019 disbursement transactions.

How to Download the DL Tools Software and Documentation

You can download DL Tools and related user documentation from the FSAdownload Web site.

DL Tools Software

Instructions for downloading DL Tools are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the *DL Tools for Windows Release 18.0 Installation Guide*.

Note: Some organizations restrict their users from downloading programs from Internet sites. If you have trouble downloading, contact your technical support staff first to ensure that you have full download rights.

User Documentation

The *2018-2019 COD Technical Reference, Volume IV (DL Tools)* provides record layouts, report mock-ups, and other additional details on using DL Tools Release 18.0.

Compatibility and Compliance

Microsoft Windows Information

DL Tools, Release 18.0 is only supported currently for the Microsoft Windows 7 and Windows 8 operating systems. For more information on minimal and optimal system recommendations, see the "System Requirements" section later in this guide.

Note: Federal Student Aid has not yet fully tested the Microsoft Corporation's Windows 10 as an operating system for its PC software products, including the EDExpress and DL Tools software. We performed limited testing with Windows 10 for DL Tools, Release 18.0, but we do not currently have a projected date for full Windows 10 compatibility testing. Additional information will be provided as it becomes available.

Section 508 Compliance

To comply with Section 508 of the Rehabilitation Act, DL Tools is compatible with screen reader technology used by the visually impaired. Screen reader software cannot interpret color shading in DL Tools software entry fields. To accommodate this restriction, all DL Tools fields that are shaded yellow to indicate they are required also display a "-R" after the software label. The "-R" indicates a required field.

Getting Help

If You Have Technical Support Questions

Contact CPS/SAIG Technical Support if you have questions regarding DL Tools installation or functionality, have trouble accessing the FSAdownload Web site, or you require other technical assistance.

You can reach CPS/SAIG Technical Support Monday through Friday, 8 a.m. – 8 p.m. (ET), at **800/330-5947** (**TDD/TTY 800/511-5806**). You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov.

You can also post questions regarding DL Tools on FSATECH. FSATECH is an electronic mailing list for technical questions about Federal Student Aid systems, software, and mainframe products. For more information on subscribing to FSATECH, go to ed.gov/offices/OSFAP/services/fsatechsubscribe.html.

If You Have Questions Regarding the COD System

If you have any questions about the COD System, contact the COD School Relations Center at **800/848-0978**. You may also e-mail CODSupport@ed.gov.