

June 2021

**RE: Direct Loan Tools for Windows, Release 21.0**

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 21.0. 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 EDEExpress 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 EDEExpress using an automated process.
- Run the Disbursement Measurement Tool Report to help monitor Direct Loan records in your EDEExpress database.

Release 21.0 was developed to process data for the 2019-2020, 2020-2021, and 2021-2022 cycles. Each annual release of DL Tools adds functionality for the new processing cycle and removes the oldest cycle, enabling DL Tools to assist you with Direct Loan tasks for the three most 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 EDEExpress for Windows databases. Non-EDEExpress users can export data from a rebuilt EDEExpress database to recreate non-EDEExpress loans or databases. For information on creating file formats and exporting data from EDEExpress to an external system, see Volume III of the *2021-2022 Common Origination and Disbursement (COD) Technical Reference*.

The Disbursement Measurement Tool Report (available in DL Tools if connected to EDEExpress) and the List–Document Activity report (available in EDEExpress) 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 EDEExpress, 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 *2021-2022 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 *2021-2022 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](http://cod.ed.gov).

## About this Cover Letter

This letter includes the following information:

- Release 21.0 installation and login guidance
- Product Registration information
- A list of additional enhancements available in Release 21.0
- Release 21.0 software and user documentation download instructions
- Microsoft Windows compatibility and Section 508 compliance notices
- Contact information for technical support and additional assistance

## Release 21.0 Installation

DL Tools Release 21.0 can be installed as an upgrade to DL Tools Release 20.0, which enables you to carry 2019-2020 and 2020-2021 data from your Release 20.0 database forward to Release 21.0. If you require DL Tools functionality for award years prior to 2019-2020, you must download and install the appropriate earlier DL Tools release from the [Software and Other Tools](#) Web page.

To upgrade your DL Tools database from Release 20.0 to Release 21.0, run the Stand Alone Custom installation option (for standalone PCs) or the Workstation installation option (for PC workstations accessing a database stored on a network drive).

If you are installing the DL Tools software for the first time, 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 21.0, see the *DL Tools for Windows Release 21.0 Installation Guide*.

## 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. 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 Password Setup dialog box (**Tools, Setup, Password Setup**).

In addition, the SYSADMIN user ID 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.

For more information on security setup, see DL Tools Help in the software and the *DL Tools Release 21.0 Installation Guide*.

## **Product Registration**

**New for Release 21.0!** DL Tools, Release 21.0 includes a limited-time voluntary product registration feature intended to assist with future planning and enhancements. We designed this feature as a quick and easy process that should require minimal time and effort to complete, particularly if you are a returning DL Tools user and you opt to take advantage of the auto-fill option (see separate section below).

The product registration process contains questions about specific DL Tools functionality you currently use and your student population size. It also asks for your feedback and recommendations for DL Tools, and gathers data on whether (or how) you use DL Tools in combination with other systems in order to better understand your needs as a user. After you have completed registration, you can submit your overall product registration response to Federal Student Aid and complete the process.

Access to the product registration is limited to one DL Tools user at any given time. If you are a multi-campus school using a shared DL Tools database, we recommend you limit your response to the main campus user to avoid duplicate or conflicting feedback.

The Startup Information pane will display messages reminding you to complete and submit your voluntary product registration responses by the September 15, 2021 deadline. You (and other users defined in your DL Tools database) are prompted to complete the product registration process each time DL Tools is accessed (in Release 21.0 or any potential subsequent releases) prior to the deadline unless a response has already been submitted. DL Tools automatically removes the product registration prompt from the Startup Information pane if your PC's system date is after September 15, 2021.

See the specific sections below for more information on completing the Product Registration process:

## Accessing Product Registration

To access the product registration feature, click **Fill Out** in the Startup Information pane of the DL Tools Desktop. The pane will display reminders to complete and submit your complete product registration responses by the deadline.

### Auto-Fill Option

We enhanced the product registration process for DL Tools, Release 21.0 to add functionality that gathers information about your DL Tools use by directly accessing and analyzing the DL Tools database on your PC for the current cycle. This information automatically pre-populates responses for the product registration, saving you research and entry time.

To take advantage of this automatic update option, select **Yes, I'd like to have the system pre-populate some of the product registration answers** on the initial Welcome page. Click **Next** to proceed with the process.

DL Tools highlights information transferred to the product registration from your database in blue. You can manually edit this transferred information as needed. The blue highlighting is removed from fields updated by the automatic process and then edited by a DL Tools user subsequently after navigating away from and back to the page in question.

The automatic update process can only be used once per DL Tools, Release 21.0 database.

## Entering and Saving Product Registration Responses

When you first initiate the product registration process from the Startup Information pane, you are presented first with a Welcome page, where you designate if you want to perform the automatic update process (see previous section) or complete the process manually. You can also indicate that you do not want to complete product registration (see section below). After indicating your preference on the Welcome page, click **Next** to proceed.

The next section of the product registration is comprised of several pages of general questions about your school, your student population, your general use of DL Tools, and your overall level of satisfaction with DL Tools, and captures any suggestions or recommendations for future enhancements.

The subsequent sections of the product registration ask about the specific DL Tools functions you use and your technical environment, including your operating system and whether you use DL Tools in a standalone or networked environment.

At any time during completion of the product registration, you can save your progress and exit the process by clicking **Save** at the bottom of the screen. DL Tools stores your progress and returns you to the same location in the product registration the next time you access it. You can also click **Close** to exit the product registration process without saving. Use the **Back** and **Next** buttons to navigate to previous or subsequent pages in the process.

If you complete the automatic update process, some questions may already be completed for you and highlighted in blue, indicating they were updated based on information in your DL Tools, Release 21.0 database.

## Bypassing Product Registration

Although Federal Student Aid is eager to hear your feedback and learn more about how your school or institution uses DL Tools, your participation in the product registration process is optional. If you prefer not to complete the product registration, you can ignore messages regarding product registration that appear in the Startup Information pane until up to a month prior to the 9/15/2021 submission deadline. In the month prior to the deadline, the product registration process will initiate each time you start the DL Tools software and you will need to close it manually.

Alternatively, the Welcome page of the product registration process includes an option to bypass entry and submission of your responses and indicate to Federal Student Aid that you are not participating. On the Welcome page, select **I would not like to provide feedback to be used to improve the product** and click **Next**. A page will display asking you to verify that you do not want to complete the product registration. You can click **Submit** on this page to send a blank response to Federal Student Aid or you can click the **Click Here** link to return to the Welcome page and choose a different option for completing the process.

## Product Registration Completion and Submission

An interactive summary report is displayed at the end of the product registration process, prior to the final submission step. You can click sections of the report to return to specific questions and revise your answers. If you are satisfied with all your responses, click **Submit** to send your product registration information to Federal Student Aid using the e-mail client on your PC.

## Release 21.0 Enhancements

The following additional enhancements are available in DL Tools Release 21.0:

### General Changes

- **Program Year 2021-2022 Added** – We added DL Tools functionality and message classes applicable to program year 2021-2022. Be sure to select the appropriate **Program Year** field value (**2019-2020**, **2020-2021**, or **2021-2022**) in the DL Tools toolbar before running major functions such as import, print, or compare.
- **Program Year 2018-2019 Removed** – We removed DL Tools functionality and message classes applicable to program year 2018-2019.
- **Accessibility Enhancements to Print Functionality** – To improve accessibility for visually-impaired users and more effectively conform with requirements in Section 508 of the Rehabilitation Act, we enhanced print functionality in Release 21.0 to include a new Hypertext Markup Language (HTML) output option, which is more adaptable to screen reader technology. We also redesigned DL Tools reports and lists to convey information in a more accessible, readable format.

You can now designate a default report format (**PDF** or **HTML**) for each DL Tools user in System setup (**Tools, Setup, System**). Your default report format selection is selected automatically in the new **Format** field added to the Import, Compare, and Print dialog boxes, and can be modified as needed to the other format selection for individual reports. The new HTML format is only available when printing to the screen, to a file, or to e-mail (if available) for the report output destination.

**Note:** When printing in HTML format, note that report page breaks may not appear in logical locations and page numbers are not used.

## **Disbursement Detail External Add (DLEXDISB)**

- **Disbursement Date Range Updated for 2021-2022** – We updated import functionality for the Disbursement Detail External Add file (message class DLEXDISB) to only allow a date range of 10/1/2020 to 12/28/2025 for 2021-2022 disbursement transactions.

## **Compatibility and Compliance**

### **Microsoft Windows Information**

DL Tools, Release 21.0 is supported currently for the Microsoft Windows 8.1 and Windows 10 operating systems only. For more information on minimal and optimal system recommendations, see the *DL Tools for Windows Installation Guide* and the [August 27, 2020 electronic announcement](#).

### **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 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**. You can also send e-mail inquiries, comments, or suggestions to [CPSSAIG@ed.gov](mailto: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 <https://www2.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](mailto:CODSupport@ed.gov).