Installation Guide for

DL Tools for Windows

Release 21.0

U.S. Department of Education

Table of Contents

Introduction

Preface

William D. Ford Federal Direct Loan Tools for Windows (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.

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 Compare and Cash Management functionality. The Rebuild function is used by schools to rebuild accepted Direct Loan records in EDExpress for Windows databases. However, 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 *2021-2022 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 reports to use, when to run them, and what action to take as a result. You can use them 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 *2021-2022 COD Technical Reference*.

Review the *DL Tools, Release 21.0 Cover Letter* associated with each release for a comprehensive list of enhancements. You can download the Cover Letter and related user documentation from the [Software and Other Tools](#) page (https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools).

Important Note on DL Tools Comparison Reports: 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.

DL Tools Features

Imports

You can import the following data files:

- SAS

- Cash Detail External Add

- Loan Detail External Add

- Disbursement Detail External Add

- Rebuild – When selecting Rebuild as the import type, you have three Rebuild Type options to choose from:

    - Compare Only
    - Update All Records
    - Update Selected Records

Reports

The following DL Tools reports are available in the Print dialog box:

- Internal Ending Cash Balance Report

- SAS Cash Summary

- SAS Disbursement Summary

- SAS Cash Detail

- SAS Loan and Disbursement Detail

- Disbursement Measurement Tool Report (requires an EDExpress database connection)

The following DL Tools reports are available in the Compare dialog box:

- Cash Detail Comparison

- Loan Detail Comparison – Loan Level

- Disbursement Detail Comparison

DL Tools School-Specific Database

The DL Tools school-specific database (DLTools.accdb) uses a Microsoft Access format. Note the following:

- Microsoft Access software databases are compatible with all currently supported Microsoft Windows operating systems.

- You do *not* need any version of Microsoft Access installed on your PC to use current or future releases of EDExpress.

- The DL Tools school-specific database is password-protected. If you need this password, contact CPS/SAIG Technical Support.

- If you open the database using a version of Microsoft Access, do not allow the software to convert your database (if prompted by Access) or save any changes you make to the database or its structure.

ED strongly discourages users from viewing or manipulating any EDESuite software database using Microsoft Access. Making changes to the database using Microsoft Access can potentially cause damage to the database structure, affect proper software functionality, and limit our ability to assist you with problems you may encounter as a result.

If you choose to open any EDESuite database using Microsoft Access, you should ensure you are opening a copy of the database and not your live, "production" database. You should also ensure you have safe, reliable backups of your EDESuite databases before using Microsoft Access to open live or backup copies of the databases.

Administrator Rights Required for Installation

You must be an Administrator on your workstation to install DL Tools in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall DL Tools. After an Administrator has installed DL Tools, you can access it as a member of any standard user Windows security group. You must have read and write or higher access to the PC folder or network location of the database to run the software. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

Microsoft Windows Information

DL Tools, Release 21.0 is supported currently for the Windows 8.1 and Windows 10 operating systems only. For more information on minimal and optimal system recommendations, see the "System Requirements" section later in this guide.

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.

EDconnect

The Student Aid Internet Gateway (SAIG) is Federal Student Aid's information highway, linking members of the financial aid community with Federal Student Aid and the Title IV Application Systems. Federal Student Aid provides the EDconnect software to make it possible to send and receive data through the SAIG.

You can download the EDconnect software and associated documentation from the Software and Other Tools page.

Using this Installation Guide

Use the instructions contained in this installation guide to install DL Tools on your PC or local area network (LAN).

In this guide, you will find information on hardware and software requirements, LAN compatibility issues, and how to get help.

See "Installation Instructions" in this guide for additional instructions.

Installation Instructions for Single-User Systems

Installation Process

This section provides you with step-by-step instructions for downloading and installing DL Tools on a single-user system.

We provide instructions for network system installations in the "Local Area Network (LAN) Information" section of this installation guide.

Other topics included in this section are:

- Default folder creation with installation
- Downloading documentation and software from the Software and Other Tools Web page
- Installing the software
- Installation log
- Changing the database path for DL Tools
- Uninstalling the software

Folder Creation

The DL Tools installation process automatically creates the following two folders on your local hard drive for your DL Tools program files and your database, respectively:

C:\Program Files\EDESuite\Direct Loan Tools for Windows

C:\IAM\DATABASE

Caution: You can change the default drive and folder name for either directory during installation. However, you should not store your database in the Program Files directory on your C:\ drive, as this can lead to database duplication and management issues in some versions of Microsoft Windows.

If you modify the drive and folder name for either directory, you must remember to change to those alternate locations during the installation process for each DL Tools software update you receive for enhancements to be loaded properly.

Downloading Documentation and Software from the Software and Other Tools Web Page

You can download Federal Student Aid software and user documentation from the Software and Other Tools page.

Downloading DL Tools Documentation

To download DL Tools user documentation:

1. Go to the Software and Other Tools page.

2. To download the *DL Tools Release 21.0 Cover Letter*:

   - Click the **Direct Loan Tools** link.
   - Click **DL Tools Release 21.0** under the **By Release Number** heading.
   - In the **Direct Loan Tools Release 21.0** section of the page, click the date-specific link under **Documentation** that corresponds to the Direct Loan Tools Release 21.0 Cover Letter.

   To download the *2021-2022 COD Technical Reference, Volume IV (DL Tools)*:

   - Click the **Library** link on the top menu.
   - Scroll down and click the **Publications by System** section of the page. On the subsequent page, click the **COD** link.
   - On the Current tab, scroll through the list of publications and click the most recent link for the **2021-2022 COD Technical Reference**.

3. In the **Attachments** section, click each of the links associated with sections 1-4 of Volume IV to view or save each PDF file. You may need to scroll down the page to locate the file(s) you want to download.

4. To save a copy of an open document to your system, click **File**, **Save As** from the browser menu bar. Select a location on your computer and click the **Save** button to save the file. If **Save As** is not available, you can also click the diskette button to select a location to save the file to your computer. The Web site is designed to give the file a default name; however, you can choose another name for the file.

5. After you download the document, go to the location where the file is saved and double-click the file to open and print it.

Downloading DL Tools Software

The DL Tools software is available for download from the Software and Other Tools page as a single installation file called **DLTool21X.exe**, where "21X" is the release number (for example, DL Tools Release 21.0's single install file is called DLTools210.exe).

To download the DL Tools installation file:

1. Go to the Software and Other Tools page.

2. Click the **Direct Loan Tools** link.

3. Under the By Release section of the page, click the **Release 21.X** (where X is the release number) link.

4. In the Direct Loan Tools Release 21.0 section of the page, click the date-specific link under **Software** that corresponds to the latest version of Direct Loan Tools Release 21.X.

5. Click the **Full Download** link in the software section to download the installation file. If you are presented the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.

6. Select the download location and click **Save**.

   Note: The download time depends on the file size and Internet connection speed.

7. After the file is downloaded, go to the saved location and double-click **DLTool21X.exe** (where 21X is the release number) to extract the file and install DL Tools.

Note: After you have downloaded the software, see "Installing the Software on a Single-User System" or "Installing the Software on a LAN" in this guide for installation instructions.

Getting Help

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

Installing the Software on a Single-User System

Downloading DL Tools does not install the software on your system. After downloading the software, you must run the installation program to load the software to your PCs or LAN. To install the software on a LAN, see "Installing the Software on a LAN" in this guide.

Note: If you require DL Tools functionality for award years prior to 2019-2020, you must use an earlier DL Tools release. Earlier versions of DL Tools can be downloaded from the Software and Other Tools page.

Note: You must be an Administrator on your workstation to install DL Tools in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall DL Tools. After an Administrator has installed DL Tools, you can access it as a member of any standard user Windows security group. You must have read and write or higher access to the PC folder or network location of the database to run the software. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

Installation Options

You can install the DL Tools software to a standalone PC using one of two options:

1. **Stand Alone Full.** Use this option if you are installing DL Tools, Release 21.0 to a single, non-networked computer for the first time and want to install all available DL Tools files and functionality.

   Warning for Subsequent Installations: Use caution when using the Stand Alone Full installation option. This option overwrites your existing DL Tools school-specific database (**DLTools.accdb**) and all program files (including **DLTools.exe**).

2. **Stand Alone Custom.** For DL Tools for Windows, Release 21.0, Stand Alone Custom is the default installation selection. Use a Stand Alone Custom installation in one of two ways on one non-networked computer:

   - To upgrade DL Tools (for example, from Release 20.0 to Release 21.0 or from Release 21.0 to Release 21.1), select the Stand Alone Custom installation option and choose all components except Database (*.accdb). This is the default selection.

   - If you previously installed a full release of DL Tools, you can use the Stand Alone Custom option to reinstall the Help files (*.chm) or the school-specific database (*.accdb).

     Caution: Selecting **Database** during a Stand Alone Custom installation overwrites your existing DL Tools school-specific database, including all entered or imported data.

Important Note on Backups: We strongly recommend you create a backup copy of your school-specific Release 20.0 database (**DLTools.accdb**) before running a Stand Alone Custom installation of Release 21.0. After the installation is complete, you will no longer be able to access your database using Release 20.0.

Steps to Install

1. After closing all running Windows applications, go to the location of the **DLTool21X.exe** (where "21X" is the release number) file you downloaded.

2. Double-click the **DLTool21X.exe** file to start the installation. The file unpacks itself into a temporary folder and continues the installation.

   Important Note: When you initiate the installation process, you will be prompted to install the ACE Access Database Engine. This functionality is required to run DL Tools. Click **Install** to allow the process to determine if the ACE Access Database Engine is already on the workstation and install it if it isn't, after which the installation will proceed.

   Important Note: DL Tools requires Microsoft .NET Framework version 4.6.2. You will be prompted to install this software if the installation process determines it is not available on your workstation.

3. DL Tools displays a series of prompts during the installation. The default answer is selected. Under normal circumstances, you should accept the default answer. If the default answer is correct, click **Next**.

   You can change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each DL Tools software update you receive for enhancements to be loaded properly.

   Note: Click **Yes** if you receive a message asking if you want to overwrite any read-only files when installing the software.

4. Continue this process until you reach the last installation dialog box, which prompts you to click the **Finish** button.

When the DL Tools installation process is complete, your Start menu is updated and displays an icon for DL Tools for Windows. However, desktop icons are not created automatically.

Installing Subsequent Releases

When you install an update release of the DL Tools software (for example, from Release 21.0 to a version of the same year, such as Release 21.1), which may be posted to resolve software issues or implement enhancements, a special process updates the database. The update process occurs the first time the software is started after installing the software upgrade. It runs only once, whether for a standalone or network database. If there are no updates to the database, this update does not occur. See "Installation Options" in this installation guide for more information about installing subsequent releases.

Windows Installation Log

When you first install DL Tools Release 21.0, an installation log is created in the Windows directory of the workstation (for example, **C:\Windows**) named **DLTools21X.log**. The DL Tools installation log is updated during each installation and contains a detailed record of files affected during the software installation.

The information tracked in the installation log includes the DL Tools installation directory, the Windows directory, the Windows system directory, whether or not a CD-ROM is available, screen resolution, disk space available, boot drive, install engine, extended memory, and information about files before and after installation. This information can be helpful to users and to CPS/SAIG Technical Support in researching software issues that may occur.

Changing the DL Tools Database Path

You can change the DL Tools database path from within the DL Tools software. System administrators may need to use this functionality following the restoration of a back-up school-specific DL Tools database (DLTools.accdb) or **after** relocating the database from one PC or LAN folder to another directory.

To Change the Database Path

1. Open DL Tools and select **Help**, **System Information**.

2. Click the **Files Information** tab.

3. Click in the **Database Path** field and enter the full path and database name (**DLTools.accdb**) exactly as it displays in Windows Explorer, with uppercase and lowercase letters.

4. Click the **Enter** key to confirm the new database path.

5. Click **OK** to exit the System Information dialog box.

6. **Exit** the DL Tools software.

The next time you start DL Tools, you will connect to the database using the new database path. You can confirm your connection to the new database by viewing the current database name and location in the status bar on the bottom of the main DL Tools window after you log in.

Uninstall

To uninstall DL Tools, click **Start**, **Programs** from your Windows desktop and select **EDESuite**, **Direct Loan Tools for Windows** to see an icon for the Uninstall utility.

Warning: If you are running DL Tools on a stand-alone PC, the Uninstall process deletes your current DL Tools database, the executable file, Dynamic Link Library (DLL) files, and icons created during the installation of the DL Tools software from the Start menu and the software's program group. Do not run the Uninstall process unless you are sure you want to delete these files from your PC.

If your DL Tools database is installed on a LAN, running the Uninstall utility deletes all DL Tools files and icons from your workstation, but does not delete the DL Tools database on your LAN.

To Uninstall DL Tools

1. Click the **Uninstall** icon. You are prompted to confirm that you want to remove the application and all of its components completely.

2. Click the **Yes** button.

3. Click **OK**.

DL Tools may also prompt you with additional questions during the Uninstall process. Click **Yes** or **No** in response to these questions.

Warning: Do *not* uninstall the DL Tools software before performing a Custom installation.

Getting Started

Logging In for the First Time

Before you can use DL Tools, you need to enter the default user ID and password and create a new user ID and password.

We provide instructions for these initial tasks in this section.

User ID and Password

Each time you start DL Tools, you must enter a valid user ID and password. For system security, we recommend you define a unique user ID and password for each user.

To access DL Tools for the first time after installation:

1. Select **Start**, **Programs**, **EDESuite**, **Direct Loan Tools for Windows**, and choose **Direct Loan Tools for Windows**.

2. Type in the default user ID, **SYSADMIN**. Until you create a user ID for yourself or user IDs for others in your office, SYSADMIN is the default user ID.

3. Type in the default password, **$y$tem Adm1n**. Be sure to include the space between **$y$tem** and **Adm1n** (the two parts of the default password).

4. Type a **new password** in the New Password box. You must change the SYSADMIN password the first time you log in to the software. The new password becomes the password for the SYSADMIN user ID.

    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 later in the Password Setup dialog box (**Tools**, **Setup**, **Password Setup**).

5. Type the **new password** again in the Verify Password field. The New Password and Verify Password must be the same.

6. Click **OK** to log in.

Note: We limit the SYSADMIN user ID to specific administrative functions. To access other DL Tools functionality, you must establish a new user ID with the appropriate access level and log into the software using that user ID. Refer to the topic "Security Users dialog box" in DL Tools Help for information on setting up user IDs and passwords for your staff.

Note: After you log into DL Tools for the first time, the Startup Information pane of the DL Tools Desktop appears and may display warnings or alerts, some of which you can remove by clicking the **Suppress** button under the message.

Resetting Your User ID and Password

If you have forgotten your password, your DL Tools administrator can use the Security Users function to give you a new one.

To Access the Security Users Function

1. Select **Tools** from the menu bar.

2. Select **Setup**, **Security Users**.

If you are the DL Tools administrator and you have forgotten your password, call CPS/SAIG Technical Support for help with resetting the password for the default SYSADMIN user ID.

System Requirements

Hardware and Software Requirements

The Student Assistance General Provisions regulations in 34 CFR 668.16(o) provide, in part, that to be administratively capable an institution must participate in electronic processes designated by the Secretary. These processes were first identified in a notice published in the *Federal Register* on September 19, 1997. In that Notice, we also provided information regarding the hardware and software requirements needed for an institution to participate in the designated electronic processes. As a result of technology advances, we updated those hardware and software requirements in *Federal Register* Notices published in December 2000 and September 2004 and in an electronic announcement published in December 2007.

Most recently, Federal Student Aid published minimum and optimal system configuration recommendations specific to EDExpress in the August 27, 2020 electronic announcement. This electronic announcement updated our recommendations to indicate that Microsoft Windows 8.1 and Windows 10 are the only supported operating systems for DL Tool, Release 21.0.

Note: You should routinely check for recent electronic announcements concerning minimum and optimal system configuration recommendations.

The following minimum and optimal hardware and software configurations are required for DL Tools, Release 21.0 users, per the [August 27, 2020 electronic announcement](#):

Hardware/Software Device	Minimum Configuration	Optimal Configuration
IBM or Fully IBM-compatible PC	1 GHz or faster 32-bit (x86) or 64-bit (x64) Processor	2 GHz or faster 32-bit (x86) or 64-bit (x64) Processor
Memory*	4 GB RAM	8 GB RAM
Hard Disk	5 GB free space	10 GB free space
Monitor and Video Card	Capable of 1024 x 768 resolution or higher	Capable of 1920 x 1080 resolution or higher
Internet Connection	High-Speed Internet Connection	High-Speed Internet Connection
Printer	N/A (reports may be saved electronically)	Laser printer
Operating System	Windows 8.1 or Windows 10 (Professional version)	Windows 10 (Professional version)

* For the operating system alone, Microsoft requires a minimum of 1 GB of memory for 32-bit processors and 2 GB of memory for 64-bit processors.

Note: DL Tools requires Microsoft .NET Framework version 4.6.2. You will be prompted to install this software if the installation process determines it is not available on your workstation.

LAN Hardware and Software Recommendations

In addition to the configuration recommendations outlined in the "Hardware and Software Requirements" section, the following hardware and software components are recommended for running DL Tools in a LAN environment:

- 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

DL Tools was designed for use on stand-alone computers or on traditional workstations with the program files installed on workstations that are accessing a network database. The following configurations are **not** supported:

- Citrix interfaces to DL Tools software running on a LAN server
- DL Tools program files installed to a LAN server and running from a workstation
- Terminal servers or "thin" clients
- Virtual/remote desktops or remote access configurations
- Virtual machines, compatibility layers
- WANs (Wide Area Networks)
- Peer-to-peer configurations

Refer to "Systems Requirements" for a complete listing of the general hardware and software required for DL Tools.

Recommended Items to Consider

We strongly encourage you to use the following additional tools to assist you in managing and protecting your financial aid data:

- Secure backup system (for example, a CD or DVD drive with read/write capability or a flash drive) with sufficient capacity to store your data. We recommend that you access and review your backup data regularly to make sure your backup system is working.

- Power supply backup and surge protectors

- Phone line surge protector

- Virus scan software with current virus definitions

Local Area Network (LAN) Information

Installing the Software on a LAN

Installation Options

You can install the DL Tools software to a LAN using one of two options:

1. **Network Server**. Use this option *only* when installing DL Tools for Windows to a LAN for the first time. The Network Server option only installs the DL Tools database to a LAN location. It does not install the DL Tools program files.

   Note: If you receive a "ComponentMoveData" error message during a Network Server installation, you may have insufficient network rights to install the database to your LAN. Check with your technical support staff if you receive this error message.

   Warning for Subsequent Installations: Use caution when using the Network Server installation option. The Network Server option overwrites your school-specific database (DLTools.accdb), resulting in a loss of all existing entered and imported student data. A warning message appears during the installation if you are at risk of overwriting your database.

2. **Workstation**. Use this option to install Release 21.0 to a workstation for the first time or to install a subsequent upgrade release (for example, from Release 21.0 to Release 21.1) on a workstation that will be used to access a LAN-based copy of the database. If you have performed a Workstation installation of DL Tools, you can use the option subsequently to add components (such as help files) that you did not install the first time. This option leaves all other database and system settings intact.

Important Notes

- To work with DL Tools data for award years prior to 2019-2020, you must use an earlier version of DL Tools.

- We strongly recommend you create a backup copy of your school-specific Release 20.0 database (**DLTools.accdb**) before running Workstation installations of Release 21.0. After the installations are complete, you will no longer be able to access your database using Release 20.0.

- You must be an Administrator on your workstation to install DL Tools in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall DL Tools. After an Administrator has installed DL Tools, you can access it as a member of any standard user Windows security group. You must have read and write or higher access to the PC folder or network location of the database to run the software. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

Installation Instructions

Follow the instructions in this section for installing the DL Tools software on a network. For example:

- If you are installing DL Tools for the first time, perform a full installation and follow the steps provided in "First Time Network Installation."

- If you are installing DL Tools after you have created data in the database, follow the instructions provided in "Subsequent Network Installation."

When you perform a workstation installation, the executable file for DL Tools (**DLTools.exe**) and all other program files are installed to the workstation's local hard drive. Do *not* install the program files to your LAN.

The installation modifies all DL Tools program group icons on your Windows Start Menu folder to point to the executable file on your local hard drive.

Installing the DL Tools executable file (**DLTools.exe**) to the workstation's hard drive rather than a LAN improves the software speed and performance, because DL Tools uses the combined resources of the workstation and the LAN instead of the LAN alone.

Note: The DL Tools software can be installed in Safe Mode, if necessary, but it cannot be run in Safe Mode.

Note: Close all running Windows applications before you proceed with installation.

First Time LAN Installation

To Install the Software on a LAN for the First Time

1. Select the **Network Server** installation option to install only the DL Tools for Windows database (**DLTools.accdb**) on the LAN (not the DL Tools program files).

2. Enter the network server location where you want to install the DL Tools for Windows database. You can type the path or click the **Browse** button.

3. Follow the prompts provided by the setup program.

4. Perform a **Workstation** installation on *all* workstations that will access the LAN-based database copy for this release of DL Tools. The Workstation option installs all program files, including the executable file (**DLTools.exe**) to your local hard drive.

Note: The Workstation installation option prompts you for the database location installed during the Network Server installation (step 2). Be sure you know the database location on your LAN before installing DL Tools.

Additional Instructions

You are asked two location questions during a Workstation installation:

- The software initially asks you where you want to install the program files. Your response should be the default location, **C:\Program Files\EDESuite\Direct Loan Tools for Windows**, or another local workstation designation.

- The software subsequently prompts you to enter the location of the database on the LAN. This question is asking where your DL Tools database is located, not where you want the software's program files installed.

- When you initiate the installation process, you will be prompted to install the ACE Access Database Engine. This functionality is required to run DL Tools. Click **Install** to allow the process to determine if the ACE Access Database Engine is already on the workstation and install it if it isn't, after which the installation will proceed.

- DL Tools, Release requires Microsoft .NET Framework version 4.6.2. You will be prompted to install this software if the installation process determines it is not available on your workstation.

To Install Subsequent and Future Releases

For all future releases of DL Tools for Windows, Release 21.0 (for example, Release 21.1), perform a **Workstation** installation. The database structure is updated but not overwritten. Follow the instructions in "Subsequent LAN Installation" for more information.

Note: Some DL Tools releases only update program files on your workstations and do not perform any updates to your database. See the electronic announcement and other documentation posted for a given DL Tools release for more information on the installation process that should be performed.

LAN Cautions

When multiple users are concurrently using the DL Tools database, the student records being modified are locked. In addition, certain functions are locked when concurrent access would degrade the system or disrupt a process.

Examples include:

- The DL Tools database is locked when the executing function is mass loading records, such as the Import function.

- When performing a Rebuild on an EDExpress database using DL Tools, the student records in EDExpress being recreated will be locked until the Rebuild process is complete.

- Records are locked when an executing function needs stable data for updating or printing.

Getting Help

Basics

To get DL Tools installation help:

- Review installation instructions

- Become familiar with your PC

- Contact your system administrator

- Use DL Tools Help

- Contact Technical Support

Review Installation Instructions

If you have problems installing DL Tools, first review the installation instructions again and try repeating the installation process (make sure you include all steps).

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

Become Familiar with Your PC

After you have successfully completed the DL Tools installation, click **System Information** from the Help menu.

Compare this information to the required configuration listed in the "Hardware and Software Requirements" section earlier in this guide. 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 installing software using your PC. For example, you may receive an error if you are trying to install the DL Tools software to a drive for which you do not have access.

Use DL Tools Help

Instead of a paper user's guide, DL Tools has a help system. You can access the help system using the following methods:

- Select a Help command from the **Help** menu.

- Select the **Help** button available in most dialog boxes.

- Use the keyboard or mouse to select an item from a menu, and press **F1** to see a description of the item.

- Select a dialog box option or command and press **F1**, or click the **Help** button to move directly to an explanation of the option.

- Use the **Help** toolbar button to obtain help on menu options and other toolbars.

Contact Technical Support

FSATECH Listserv

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.

CPS/SAIG Technical Support

CPS/SAIG Technical Support provides technical assistance and can help you with questions regarding:

- Software functionality

- ISIR and custom file layouts

- EDconnect functionality

Call CPS/SAIG Technical Support at:

800/330-5947

or e-mail your inquiries to CPS/SAIG Technical Support at:

CPSSAIG@ed.gov

See the topic "CPS/SAIG Technical Support" in the DL Tools Help system for more information.

Representatives are available to assist you between 8 a.m. and 8 p.m. (ET), Monday through Friday, excluding holidays.

Guidelines for Calling Technical Support

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

- Your TG ID (TG followed by a five-digit number).

- The software release you are using (under **Help**, **About DL Tools for Windows**).

- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, and available disk space).

- 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 before calling.

CPS/SAIG Voice Response System

The CPS/SAIG Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to enter:

- **1** for an English-speaking operator

- **2** for a Spanish-speaking operator