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**Installation Guide for**

# **EDExpress for Windows**

**2023-2024**

**U.S. Department of Education**



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# Introduction

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## Preface

EDEExpress for Windows is a fully integrated software package provided by Federal Student Aid that enables schools to process, package, and manage student financial aid records electronically in an easy-to-use Windows format. The following modules are available in EDEExpress:

- Application Processing—For managing your Free Application for Federal Student Aid (FAFSA) application data. EDEExpress interfaces with the FAA Access to CPS Online Web site so you can enter and submit data directly to the CPS.
- Packaging—For creating financial aid award packages for your students.
- Direct Loan—For processing William D. Ford Direct Loan origination and disbursement data for your students.
- Pell Grant—For processing Federal Pell Grant origination and disbursement data for your students.
- TEACH Grant—For processing Teacher Education Assistance for College and Higher Education Grant (TEACH Grant) origination and disbursement data for your students.

EDEExpress 2023-2024, Release 1.0, contains Global functionality, the Application Processing module, and the Packaging module. Release 2.0 adds the Pell, TEACH Grant, and Direct Loan modules.

Review the *EDEExpress for Windows 2023-2024 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](https://fsapartners.ed.gov/knowledge-center) page of the Knowledge Center at FSA Partner Connect Web site, located at [fsapartners.ed.gov/knowledge-center](https://fsapartners.ed.gov/knowledge-center).

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# EDExpress Features

## Integrated PC Software Package

EDExpress is a fully integrated PC software package that enables you to create and manage a database of financial aid records. Cross-module functions include:

- Maintaining application databases
- Tracking the receipt of student documents
- Creating student financial aid award packages
- Printing award letters and the College Financing Plan
- Generating Pell Grant and Direct Loan documents for transmission to the Common Origination and Disbursement (COD) system
- Importing processed data files from the CPS and the COD System into your database
- Exporting external files for use in other school software
- Importing external files to update records before exporting and transmitting to the COD System
- Querying a student database
- Generating and printing reports
- Creating user-defined fields
- Setting passwords and controlling user access

## EDExpress School-Specific Database

The EDExpress school-specific database (expres24.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 EDExpress 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 EDEExpress 2023-2024 in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall EDEExpress. After an Administrator has installed EDEExpress, 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 EDEExpress software.

## **Microsoft Windows Information**

EDEExpress 2023-2024 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 “System Requirements” section later in this guide.

## **Section 508 Compliance**

To comply with Section 508 of the Rehabilitation Act, all EDESuite PC products are compatible with screen reader technology used by the visually impaired. EDEExpress includes enhancements to print functionality and the design of reports, lists, and other documents to improve our Section 508 compliance, including the ability to print reports in HTML format, which is more compatible with screen reader software.

In addition, screen reader software cannot interpret color shading in EDESuite software entry fields. To accommodate this restriction, EDESuite software includes the following features:

- All software fields that are shaded yellow to indicate they are required also display a “-R” after the software label. The “-R” indicates the field is required.
- All software fields that are shaded blue after a previously saved value has been modified also display a “-C” after the software label. The “-C” text indicates the field has been changed.

## Demographic Record

The EDEExpress database is organized around a feature called the demographic record. Each student in your database has a demographic record that stores the student's address, telephone number, Social Security Number (SSN), and other demographic information.

When you enter or edit a student record, you start on the Demo tab and access the student's other financial aid records from there. For example, you can access a student's packaging information by clicking the Awards tab, or access Pell Grant, TEACH Grant, and Direct Loan data by clicking the Origination or Disbursement tabs.

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## 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, the *SAIG Desk Reference for EDconnect*, and the *Installation Guide for EDconnect* from the Knowledge Center Web site.

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# Using this Installation Guide

Use the instructions contained in this Installation Guide to install EDEExpress on your PC or local area network (LAN).

In this guide, you will find information on hardware and software requirements, estimating the amount of hard disk space you will need on each computer, LAN compatibility issues, and how to get help.

See “Installation Instructions” in this guide for additional instructions.



# Installation Instructions for Single-User Systems

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## Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing EDEExpress 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 Knowledge Center Web site
- Installing the software
- Installation log
- Changing the database path for EDEExpress
- Uninstalling the software

## Folder Creation

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

**C:\Program Files (x86)\EDSuite\EDExpress for Windows 2023-2024**

**C:\IAM\DATABASE**

You can change the default drive and folder name for either directory during installation. 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 EDEExpress software update you receive for enhancements to be loaded properly.

**Note:** The Export and Import folders in EDEExpress (**Tools, Setup, Global, File Management**) should be the same as the Send and Receive folders in the EDconnect for Windows software.

## Downloading Documentation and Software from the Knowledge Center Web Site

You can download the EDEExpress software from the [Software and Other Tools](https://fsapartners.ed.gov/knowledge-center) page of the Knowledge Center Web site, located at [fsapartners.ed.gov/knowledge-center](https://fsapartners.ed.gov/knowledge-center). The software installation file is called express24rX.exe, where “X” is the release number (for example, EDEExpress Release 1.0’s single install file is called express24r1.exe). See “Downloading EDEExpress from the Knowledge Center Web Site” in this guide for more details.

You can also download Federal Student Aid user documentation from the Knowledge Center Web site, which provide more information and guidance regarding EDEExpress. The following types of documentation are available to download in Adobe PDF (Portable Document Format) for EDEExpress:

- *EDEExpress for Windows 2023-2024 Cover Letters*
- *EDEExpress for Windows 2023-2024 Desk References*
- *2023-2024 EDEExpress Packaging Technical Reference*
- *2023-2024 Electronic Data Exchange (EDE) Technical Reference*
- *2023-2024 Common Origination and Disbursement (COD) Technical Reference, Volume III (Pell Grant, TEACH Grant, & Direct Loan Combination System Supplement)*

## Downloading Documentation from the Knowledge Center Web Site

1. Go to the [Software and Other Tools](https://fsapartners.ed.gov/knowledge-center) page.
2. To download the *EDEExpress 2023-2024 Cover Letter* or *EDEExpress 2023-2024 Desk Reference* for a specific release:
  - Click the **EDEExpress** link.
  - Click the **2023-2024** link under the By Award Year heading.
  - Under the Documentation heading, click the date-specific link for the cover letter or desk reference to access the Knowledge Center Web page where you can access a download link for the document.

To download 2023-2024 technical references:

- Click the **Library** link on the top menu of the Knowledge Center home page.
- Expand the “Publications by Document Type” section and select **System Technical References**.
- On the Current tab, click the link for the **2023-2024 COD Technical Reference**, **EDE Technical Reference**, or **EDEExpress Packaging Technical Reference**. If multiple versions of the document are available, we recommend you select the most recent link by date for the specified technical reference.

3. In the **Attachments** section, click the single or section-specific links to view or save each PDF file. You may need to scroll down the page to locate the file(s) you want to download, depending on the technical reference.
4. If you would like to save a copy of the document to your system, click **File, Save As** from the browser menu bar. Select a location on your computer, and then click the **Save** button to save the file. The Web site is designed to give the file a default name; however, you can choose another name for the file.
5. After you have downloaded the document, go to the saved location and double-click the file to open and print it.

## Downloading EDEExpress from the Knowledge Center Web Site

The EDEExpress 2023-2024 software is available for download from the Knowledge Center Web site as a single installation file.

1. Go to the [Software and Other Tools](#) page.
2. Click the **EDEExpress** link.
3. Click the **2023-2024** link under the By Award Year heading.
4. In the Software section of the EDEExpress 2023-2024 page, click the date-specific link that corresponds to the latest version of EDEExpress 2023-2024.
5. Click the **Full Download** link in the Attachments section to download the program as a single file. If you are given 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 length of time it takes to download the software depends on the speed of your Internet connection.
7. After the file is downloaded, go to the saved location and double-click **express24rX.exe** (where X is the release number) to install EDEExpress.

**Note:** See “Installing the Software on a Single-User System” or “Installing the Software on a Network” in this guide for more information on how to install EDEExpress after you have downloaded the software.

## 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.

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# Installing the Software on a Single-User System

Downloading EDEExpress from the Knowledge Center Web site does not install the software on your system. After downloading the software to your computer, you must run the installation program to load the software to your PC or LAN. To install the software on a LAN, see “Installing the Software on a LAN” in this guide.

**Important Note:** You must be an Administrator on your workstation to install or uninstall EDEExpress 2023-2024 in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall EDEExpress. After an Administrator has installed EDEExpress, 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 EDEExpress software.

## Installation Options

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

1. **Stand Alone Full.** Use this option when you are installing EDEExpress 2023-2024 to a single, non-networked computer for the first time and want to install all available EDEExpress modules.

**Warning for Installations Subsequent to Release 1.0:** Exercise caution when using the Stand Alone Full installation option for EDEExpress versions after Release 1.0. This option overwrites your existing EDEExpress 2023-2024 school-specific database (**expres24.accdb**) and all program files (including **expres24.exe**), as well as any annotations you may have made to the Help system.

2. **Stand Alone Custom.** Use a Stand Alone Custom installation in one of two ways on a single non-networked computer:

- If you have already installed a full release of EDEExpress, you can use the Custom option to add Help files (\*.chm) or the database (\*.accdb).

**Caution:** Selecting **Database** during a Stand Alone Custom installation will overwrite your existing EDEExpress database, including all student data.

- To upgrade EDEExpress (for example, from Release 1.0 to Release 2.0), choose the Stand Alone Custom installation option and select everything except Database (\*.accdb). This is the default.

**Note:** If you previously installed an EDEExpress module, it does not appear in the Select Components dialog box during the Custom installation process; any updates to the module are installed automatically.

## Steps to Install

1. Close all running Windows applications.
2. If you downloaded the **express24rX.exe** file (where X is the release number) from the Knowledge Center Web site, go to the location of that downloaded file.
3. Double-click the **express24rX.exe** file to start the installation. The file unpacks itself into a temporary folder and continues the installation.

**Important Note:** When you initiate the EDEExpress 2023-2024 installation process, you may be prompted to install the ACE Access Database Engine. This functionality is required to install EDEExpress 2023-2024. 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:** EDEExpress 2023-2024 requires Microsoft .NET Framework version 4.6.2. You may be prompted to install this software if the EDEExpress 2023-2024 installation process determines it is not available on your workstation.

4. EDEExpress asks you a series of questions during the installation. The default answer for each question is already selected for you, which you should accept in most circumstances.

If the default answer is correct, click **Next**.

**Caution:** You can change the default drive and folder name for your EDEExpress program files and your database during installation. 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 EDEExpress 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.

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

When the EDEExpress installation process completes, your Start menu is updated and displays an EDEExpress for Windows 2023-2024 icon. Desktop icons are not created automatically.

## Installing Subsequent Releases

When you install an update release of the EDEExpress software (for example, from Release 2.0 to a version of the same year, such as Release 3.0), which may be posted to add software enhancements, a special process updates the database. The update process occurs the first time you start the software after installing the software upgrade. It runs only once, whether in a standalone or network database. If there are no updates to the database, this update does not occur.

**Note:** See “Installation Options” in this installation guide for more information about installing subsequent releases.

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# Windows Installation Log

When you first install EDEExpress 2023-2024, an installation log is created in the Windows directory of the workstation (for example, **C:\Windows**) named **ExpressV24x.log**. The EDEExpress installation log is updated during each 2023-2024 installation and contains a detailed record of all files affected during the installation of the software.

The information tracked in the installation log includes the EDEExpress 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.

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# Changing the EDEExpress Database Path

You can change the EDEExpress database path from within the EDEExpress software. System administrators may need to use this functionality following the restoration of a back-up EDEExpress database (**expres24.accdb**) or **after** the relocation of the database from one PC or LAN folder to another directory.

## To Change the Database Path

1. Open EDEExpress 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 (**expres23.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 EDEExpress software.

The next time you start EDEExpress, 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 EDEExpress window after you log in.

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# Uninstall

To uninstall EDEExpress, click **Start, Programs** from your Windows desktop and select **EDESuite, EDEExpress 2023-2024** to see an icon for the Uninstall utility.

**Warning:** If you are running EDEExpress on a stand-alone PC, the Uninstall process deletes your current EDEExpress database, the executable file, and all Dynamic Link Library (DLL) files, as well as icons created during the installation of the EDEExpress 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 EDEExpress database is installed on a LAN, running the Uninstall utility deletes all EDEExpress files and icons from your workstation, but does not delete the EDEExpress database on your LAN.

## To Uninstall EDEExpress

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

EDEExpress may also ask you additional questions during the Uninstall process. Click either **Yes** or **No** as appropriate in response to these questions.

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



# Getting Started

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## Logging In for the First Time

Before you can use EDEExpress, you need to enter the default user ID and password, create a new user ID and password, and establish your school as the assumed school used by EDEExpress. You can also import setup and demographic data from the prior year's EDEExpress database.

We provide instructions for these initial tasks in this section.

### User ID and Password

Each time you start EDEExpress, 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 EDEExpress for the first time after installation:

1. Select **Start, Programs, EDESuite, EDEExpress 2023-2024** and choose **EDEExpress for Windows 2023-2024**.
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.

EDEExpress 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, Global, 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.

**Important Note!** We limit the SYSADMIN user ID to specific administrative functions. To access prior year import and other EDEExpress functionality after initial login, 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 EDEExpress Help for information on setting up user IDs and passwords for your staff.

**Important Note!** After you log into EDEExpress for the first time, the Startup Information pane of the EDEExpress Desktop appears with an alert that your assumed school is not defined. After you have defined your assumed school code in Global Setup, this alert no longer appears. Under certain conditions, other warnings or alerts may appear in this desktop pane, some of which you can remove by clicking the **Suppress** button under the message.

**New for 2023-2024!** If you are logged into EDEExpress using the SYSADMIN user ID, you can switch to a different user ID without exiting and restarting the software. Click the **Switch User** option under the File menu to initiate the Login dialog box and log into EDEExpress using a different User ID than SYSADMIN.

## Prior Year Data Import

If you have the prior year release of EDEExpress installed, you can save time by using the EDEExpress 2023-2024 Prior Year import feature to pull forward setup information and other data from your 2022-2023 database into your 2023-2024 database.

EDEExpress 2022-2023 allows demographic data, most setup information, most queries, and any file formats you have created to be moved forward from the prior year. Any Security Group records imported from the prior cycle must be updated in Global setup to select the appropriate areas of functionality access for 2023-2024, including the EDEExpress Desktop. Pell Grant, TEACH Grant, and Direct Loan Prior Year Disbursement Profiles that are imported (after you install Release 2.0) also need to be updated and saved before they can be used.

After you log in to EDEExpress 2023-2024 for the first time with a user ID other than SYSADMIN, the Pending Imports pane of the new EDEExpress Desktop displays an option to import Prior Year User-Defined Queries, Setup, and File Formats from the EDEExpress 2022-2023 database. You can click the **Import** button in the Pending Imports pane under the prior year import item to access the Global import dialog box, review prior year import options, and initiate the import.

If you prefer not to import prior year data using the link in the Pending Imports pane, you can initiate the import later by selecting **File, Import, Global** and choosing **Prior Year User-Defined Queries, Setup, and File Formats** as the Import Type. You can also click the **Suppress** button under the prior year import option in the Pending Imports pane to clear the import type from the pane. Suppression of import types from the Pending Imports pane is specific to your user ID.

## Data That Can Be Moved Forward from Your EDEExpress 2022-2023 Database to your EDEExpress 2023-2024 Database

- Demographic (Demo tab) data
- Query—Global, Application Processing, Packaging, Pell Grant, TEACH Grant, Direct Loan
- EDEExpress Desktop Settings
- Global Setup
  - Security Groups\*
  - Document Tracking
  - Security Users
  - Password Setup
  - User-Defined Letter Text
  - System
  - File Management
  - File Formats
  - User Database
  - FAA Access
  - College Financing Plan Profiles
  - College Financing Plan School
- Application Processing Setup
  - System
  - File Formats
- Packaging Setup
  - Academic Year Profiles
  - Fund Maintenance
  - Award Methodologies
  - Budgets
  - SAP Values
  - System
  - User-Defined Formats
  - File Formats
- Pell Setup
  - File Formats
- TEACH Grant Setup
  - File Formats
- Direct Loan Setup
  - File Formats
- COD Setup
  - Direct Loan School
  - Pell School
  - TEACH School
  - System
  - Tolerances
  - Disbursement (Pell, TEACH, and Direct Loan options)\*
  - CIP Codes
  - Program Profiles

**\*Note:** Security Group records imported from EDEExpress 2022-2023 must be reviewed and updated with the appropriate areas of functionality access for 2023-2024, including the EDEExpress Desktop. Also, if you import your disbursement profile codes from EDEExpress 2022-2023, the codes are displayed with a read-only inactive flag until you update and save the codes with applicable 2023-2024 anticipated disbursement dates, payment period start and end dates, and date ranges for the Academic Year Start/End Date and Loan Period Start/End Date fields.

The COD Setup, Pell, TEACH Grant, and Direct Loan Prior Year Import options are not available until you have installed EDEExpress 2023-2024, Release 2.0.

## **Data That Will Not Be Moved Forward**

- Queries that reference modified or deleted fields, or date parameters
- Packaging Fund Maintenance fund amounts
- Access rights for Security Groups

## **To Perform the Import of Your Prior Year User-Defined Queries, Setup, and File Formats**

1. Click the Import button in the Pending Imports pane of the EDEExpress Desktop under the prior year import item OR go to **File, Import, Global**.
2. If it is not already selected, click the down arrow next to the Import Type field and select **Prior Year User-Defined Queries, Setup, and File Formats**.
3. Verify the location of your EDEExpress 2022-2023 database (**expres23.accdb**).
4. Select **Printer, File, or Screen** as the output destination. If you want to send the report to a file, click the **File** button and enter a name for the file.

If you are printing to the screen or to a file, you can select the report format by choosing PDF or HTML in the **Format** field.

If you chose **File** as your output destination, no paper copy is printed (the information is printed to the file in the format you designate). To print a paper copy, locate the file, open it using a compatible program (such as Adobe Reader for PDF files or an FSA-supported browser for HTML files), and print it. You can also password-protect import reports printed to a file by entering a password of up to 50 characters in the **Password** and **Verify Password** fields. The printed file is encrypted in PDF or ZIP format, depending on the report format designated in the Import dialog box.

5. Click **OK**. The Prior Year Move dialog box is displayed.
6. Select the items you want to import by selecting or clearing the checkboxes in the Import column.

7. Select one of the following import options:
  - **Import All records for Setup Options Selected** imports all records without prompting you to select specific records.
  - **Import only Specific records for Setup Options Selected** prompts you to select the records you want to import for each group of records, such as Security Groups and Award Methodologies.
8. Click **OK**.
  - If you chose **Import All records for Setup Options Selected**, the In Progress dialog box appears.
  - If you chose **Import only Specific records for Setup Options Selected**, you are walked through a series of grids, enabling you to specify which records to import, after which the In Progress dialog box is displayed.
9. Click **OK** to close the In Progress dialog box.
10. (Optional) Print the Import Prior Year Queries, Setup, and File Formats report.

### **To Perform the Import of Your Prior Year Demographic Data or Prior Year User Data**

1. Select **File, Import** from the menu bar, then choose **Global**.
2. The Import dialog box is displayed. In the Import Type field, select **Prior Year Demographic Data** or **Prior Year User Data**.
3. Click **OK** at the bottom of the Import dialog box.
4. A confirmation report is displayed indicating the results of the prior year data import.

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# Setting Your Assumed School Code

The first time you use EDEExpress following installation, the Startup Information pane of the new EDEExpress desktop displays the warning “Global Assumed School not defined.” To eliminate this warning message, you must set your Federal School Code as the assumed school code in EDEExpress Global School setup.

**Note:** To define your assumed school, you must be logged in with a user ID other than SYSADMIN that has access to Global Setup.

**Note:** If you are a new school that has been recently assigned a Federal School Code, your code may not be available for selection in the EDEExpress database. Follow the instructions in “To Add Your School Code” if you are unable to locate your school in Global School setup.

## To Set Your Assumed School Code

Follow the steps below to set your assumed school code.

1. Click the **Update** button under the assumed school warning in the Startup Information pane of the EDEExpress Desktop or select **Tools, Setup, Global, School**.
2. Click **OK** when you receive the message, “No Assumed School.”
3. Click the **Retrieve** button to bring up a list of schools.
  - Select your school from the list by using the scroll bars and click **OK**.
  - Your school’s information appears in the institutional fields.

**Note:** If your Federal School Code does not display in the list, click **Cancel** and follow the instructions in “To Add Your School Code” to add your school code to EDEExpress.

4. Select the **Assumed School** checkbox to define this as your assumed school.

**Note:** If you are a Direct Loan school and have both an application processing school code and a Direct Loan school code, be sure to use your application processing school code as the assumed school.

5. Click **Save** to save the record.
6. Click **OK**.

## To Add Your School Code

Follow the steps below to add your Federal School Code to EDEExpress.

1. Click the **Update** button under the assumed school warning in the Startup Information pane of the EDEExpress Desktop or select **Tools, Setup, Global, School**.
2. Click **OK** when you receive the message, “No Assumed School.”
3. Click **Add** (below the new record count box).
4. Type your **Federal School Code** in the School Code box, then fill in the data for your school.
5. Click **Save** to add the record to the EDEExpress database.
6. (Optional) Repeat steps 3-5 to add more school records.
7. Click **OK**.

After you have added your Federal School Code, follow the instructions in “To Set Your Assumed School Code” to set your Federal School Code as the assumed school code in EDEExpress Global School setup.

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# Resetting Your User ID and Password

If you have forgotten your password, your EDEExpress 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, Global, Security Users**.

All EDEExpress users, especially EDEExpress administrators, should record their user IDs and passwords and keep them in a safe place.

If you are the EDEExpress administrator and you have forgotten the password to your non-SYSADMIN User ID, you can log in with the SYSADMIN User ID and reset your personal user ID password. If you have forgotten or lost the password for your SYSADMIN User ID, call CPS/SAIG Technical Support for help with resetting the default password.

For more information on security-related software setup, see the *EDEExpress for Windows 2023-2024, Release 1.0 Desk Reference*.



# System Requirements

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## 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 EDEExpress in the [August 27, 2020 electronic announcement](#) on the Knowledge Center Web site. This electronic announcement updated our recommendations to indicate that Microsoft Windows 8.1 and Windows 10 are the only supported operating systems for EDEExpress, beginning with the 2021-2022 cycle.

**Note:** Check the Knowledge Center Web site for the most recent guidance concerning minimum and optimal system configuration recommendations and other technical guidance.

The following minimum and optimal hardware and software configurations are required for EDEExpress 2023-2024 users, per the [August 27, 2020 electronic announcement](#):

Hardware/Software	Minimum System Configuration	Optimal System 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:** You must have an FSA-supported Web browser to access the FAA Access to CPS Online Web site, such as Microsoft Edge or recent releases of Google Chrome and Mozilla Firefox. Microsoft Internet Explorer version 11 and earlier versions are not supported due to security concerns.

**Note:** EDEExpress requires Microsoft .NET Framework version 4.6.2. You may be prompted to install this software if the EDEExpress 2023-2024 installation process determines it is not available on your workstation.

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# 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 EDEExpress 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

EDEExpress 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 EDEExpress software running on a LAN server
- EDEExpress 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 EDEExpress.

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## 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 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

**Reminder:** Federal Student Aid provides the EDESuite software as a tool for school use. Although the software contains several security features to help protect Personally Identifiable Information (PII), partner organizations retain their primary responsibility for data security requirements under their Title IV Participation Agreement, SAIG Enrollment Form, and the Standards for Safeguarding Customer Information, 16 C.F.R. Part 314, issued by the Federal Trade Commission (FTC), as required by the Gramm-Leach-Bliley (GLB) Act, P.L. 106-102. In the event of an unauthorized disclosure or breach of student applicant information or other sensitive information (such as personally identifiable information), the DPA or the Qualified Individual identified under 16 C.F.R. Part 314 must notify Federal Student Aid at [CPSSAIG@ed.gov](mailto:CPSSAIG@ed.gov) within 24 hours after the incident is known or identified.

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# Local Area Network (LAN) Information

## Installing the Software on a LAN

### Installation Options

You can install the EDEExpress software to a LAN using one of three options:

1. **Network Server.** Use this option *only* when you are installing EDEExpress 2023-2024 to a LAN for the first time. The Network Server option only installs the EDEExpress database to a LAN location. It does not install the EDEExpress program files.

**Note:** If you receive a “ComponentMoveData” error message during a Network Server installation, you may not have sufficient 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. If you already have an EDEExpress database (**expres24.acddb**), the Network Server option will overwrite your database and you will lose all existing student data. You will receive a warning message during the installation if you are at risk of overwriting your database.

2. **Workstation Full.** Use this option when you are installing EDEExpress 2023-2024 for the first time on a workstation that will be used to access a server-based copy of the database and when you want to install all available EDEExpress software modules. You should also use the Workstation Full option to upgrade workstations to a new EDEExpress release (for example, to upgrade from Release 1.0 to Release 2.0).
3. **Workstation Custom.** Use a Custom installation if you want to choose which modules of the EDEExpress software to install on a workstation that will be used to access a server-based database. If you have previously installed a module, the module does not appear in the Select Components dialog box, as it is installed automatically.

If you have already performed a Workstation Full installation of EDEExpress, you can use the Custom option to add components (such as Help files) or modules (such as Packaging) that you did not install the first time. This option leaves all other database and system settings intact.

**Note:** In Release 1.0, Stand Alone Full installation is the default selection. For Release 2.0, Stand Alone Custom is the default selection.

**Important Note:** You must be an Administrator on your workstation to install or uninstall EDEExpress 2023-2024 in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall EDEExpress. After an Administrator has installed EDEExpress, 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 EDEExpress software.

## Installation Instructions

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

- If you are installing EDEExpress for the first time, perform a full installation and follow the steps provided in “First Time Network Installation.”
- If you are installing EDEExpress 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 EDEExpress (**expres24.exe**) and all other program files are installed to the workstation's local hard drive. Do *not* install the program files to your LAN.

Installing the EDEExpress executable file (**expres24.exe**) to the workstation's hard drive rather than a LAN improves the speed and performance of the software, because EDEExpress uses the combined resources of the workstation and the LAN instead of those of the LAN alone.

Follow the instructions on the next page to install EDEExpress to a LAN.

**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. First, select the **Network Server** installation option to install only the EDEExpress 2023-2024 school-specific database (**expres24.accdb**) on the LAN, not the EDEExpress program files.
2. Enter the network server location where you want to install the EDEExpress 2023-2024 database. You can type the path or click the **Browse** button.
3. Follow the prompts provided by the setup program.
4. Perform a **Workstation Full** installation on *all* workstations that will access the LAN-based copy of the database for this release of EDEExpress. The Workstation Full option installs all program files, including the executable file (**expres24.exe**), to your local hard drive.

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

## Additional Instructions

You are asked two location questions during a **Network 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 (x86)\EDESuite\EDExpress for Windows 2023-2024**, 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 EDExpress 2023-2024 database is located, not where you want the software's program files installed.
- When you initiate the EDExpress 2023-2024 installation process, you may be prompted to install the ACE Access Database Engine. This functionality is required to install EDExpress 2023-2024. 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.
- EDExpress 2023-2024 requires Microsoft .NET Framework version 4.6.2. You may be prompted to install this software if the EDExpress 2023-2024 installation process determines it is not available on your workstation.

## Subsequent LAN Installation

### To Install EDExpress on a LAN Where the Software Is Already Installed

1. You should first create a reliable, functioning backup version of your existing school-specific EDExpress database (**expres24.accdb**) before upgrading to a new release.
2. Do **not** use the **Network Server** installation option for a subsequent LAN installation of EDExpress 2023-2024. The **Network Server** installation option is only for users installing EDExpress 2023-2024 to a LAN for the first time. Choosing this installation option installs an empty EDExpress 2023-2024 school-specific database file (**expres24.accdb**) on the LAN, overwriting your existing database.

If you select the **Network Server** installation option for a subsequent LAN installation of the EDExpress software, the installation program alerts you that the EDExpress 2023-2024 database has already been installed in the specified directory. Click **OK** to return to setup and choose a different installation option.

3. Click the **Workstation Full** installation option.
4. When prompted for the location of your EDExpress 2023-2024 database (**expres24.accdb**), provide the location of your existing school-specific database. Follow this and other prompts provided by the setup program to run the installation.
5. Repeat the installation process for each workstation that accesses EDExpress 2023-2024.

If this is a first-time upgrade to a subsequent release of the EDEExpress software, the database is upgraded after all workstation installations are complete. The upgrade occurs when a user accesses the software for the first time. Subsequent installations may update the database, depending on the nature of the release and the issues or enhancements being added.

**Note:** All workstations should be upgraded with the latest release before you open the EDEExpress software to run the database update. If you fail to do this, any workstation not updated receives a software version/database mismatch error message if a user tries to run EDEExpress.

**Note:** If you are adding a workstation to your LAN environment, perform a **Workstation Full** installation of the current release of EDEExpress for that workstation.

## To Install Future Releases

For all future releases of EDEExpress 2023-2024, perform a **Workstation Full** installation. The database structure is updated but not overwritten. Follow the instructions in “Subsequent LAN Installation” for more information.

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



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## LAN Cautions

When multiple users are concurrently using the EDEExpress 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 EDEExpress 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 function would destroy the EDEExpress database. These functions include:
  - User Database (creating or deleting)
  - Compact and Repair Database
  - Verify Database

# Getting Help

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## Basics

To get help with the installation of EDEExpress:

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

## Review Installation Instructions

If you have problems installing EDEExpress, first review the installation instructions again, then 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 EDEExpress 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.

## 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 EDEExpress software to a drive for which you do not have access.

## Use EDEExpress Help

Instead of a paper user's guide, EDEExpress has a Help system. You can access the Help system by using any of the following methods:

- From the **Help** menu, choose a Help option.
- Choose the **Help** button available in most dialog boxes.
- Use the keyboard to select an item from 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 **Help** toolbar button to obtain help on menu options and other toolbars.

## 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](https://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

Please call CPS/SAIG Technical Support at **800/330-5947** or e-mail your inquiries to CPS/SAIG Technical Support at [CPSSAIG@ed.gov](mailto:CPSSAIG@ed.gov)

See the topic “CPS/SAIG Technical Support” in the EDEExpress Help 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 number (SAIG mailbox).
- The release of the software you are using (under **Help/About...**).

- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, and available disk space).
- The exact wording of any error messages you received, as they displayed 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

For a complete listing of all Federal Student Aid sources of assistance, go to the Help Center section of the Knowledge Center at FSA Partner Connect Web site, located at [fsapartners.ed.gov/knowledge-center](https://fsapartners.ed.gov/knowledge-center).