

# EDconnect 8.6.1 Plain Language Installation Guide

Guide for the most common installation scenarios

## Background

As shared in this [Electronic Announcement](#), the Department has begun transmitting FAFSA ISIRs for the 2045-25 award year to schools and states. In order to support our partners in accessing the ISIRs transmitted, we are providing this guide that summarizes the steps most commonly used when setting up EDconnect.

Expected time to complete the steps described in this guide: 45 minutes

## Requirements and considerations

These instructions are written for organizations that currently use EDconnect and wish to keep their existing database. We expect most institutions reading this guidance fall into this category.

If you are a new user to EDconnect or if you require more detailed instructions, please refer to the [EDconnect Installation and User Guide](#).

### Terms used in this document:

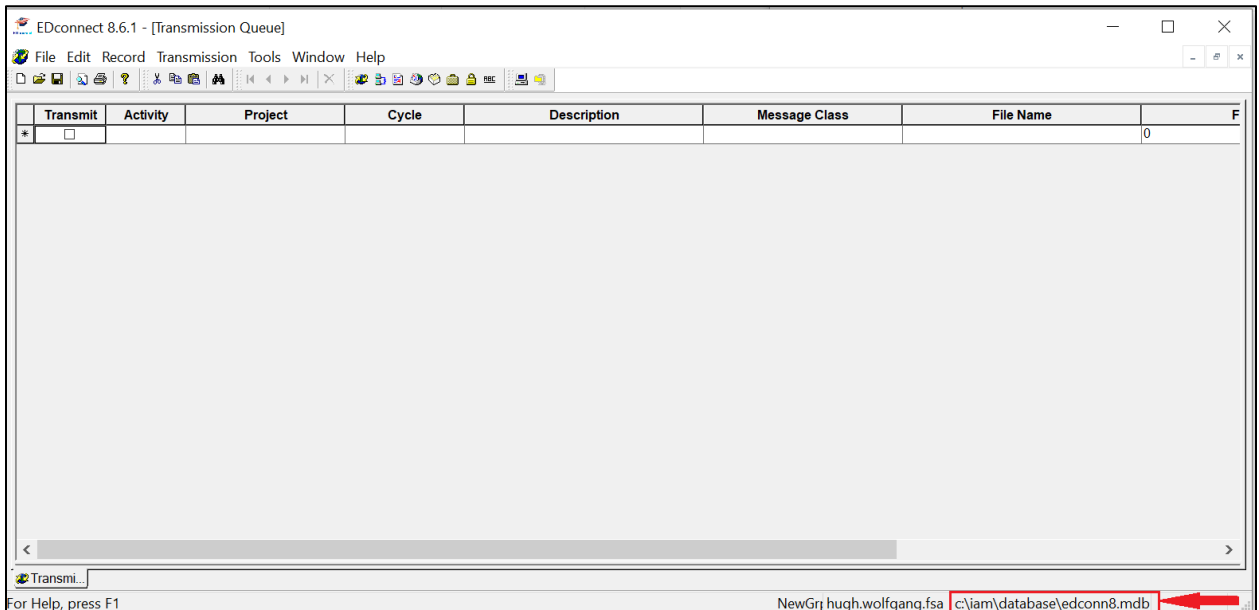
**FT number:** Used to identify an organization's newly assigned FTI-SAIG mailbox. The FT number is unique and always begins with "FT" followed by five alphanumeric characters. "FTxxxxx" is used as an example FT number throughout this document; it should be replaced with an organization's actual FT number when following instructions.

**Security Code:** This is a six-digit code generated from your physical (or software) Security Token.

### Additional considerations:

- In order to receive 2024-2025 ISIRs, each organization must sign an agreement for the new FTI-SAIG mailboxes. This mailbox is in addition to the one used in prior years in order to ensure compliance with transmission of Federal Tax Information (FTI). More information on this agreement can be found on the [Partner Connect Knowledge Center](#).
- The Primary or Secondary Destination Point Administrator (DPA) need to enroll EDconnect users. Visit the [SAIG Enrollment Site](#) and follow the steps below:

- Select “**Primary Destination Point Administrator Access**” and log in with your FSA User ID, Password, and six-digit Security Code.
- Click on “**Manage Electronic Services**”, select the “**FT**” radio button, enter the Primary TG Number (as assigned to your Primary DPA), and click “**Next**”.
- Select “**Add a new user**” and follow the prompts to complete user enrollment. Make sure to continue the process until you reach the confirmation page, and access is not completed until you reach the confirmation page. Once completed, access will be available in three hours.
- Record the location of your existing database. One easy way to find this location is to open your current version of EDconnect and look in the lower-right side of the interface.



- Some organizations use TDClient rather than EDconnect to access ISIRs in the FTI-SAIG mailbox. This continues to be a valid option and users are not required to switch to EDconnect.
- Depending on how your organization has configured EDconnect, you may need a system administrator to implement these instructions, as they are not something all individual users are able to do directly.

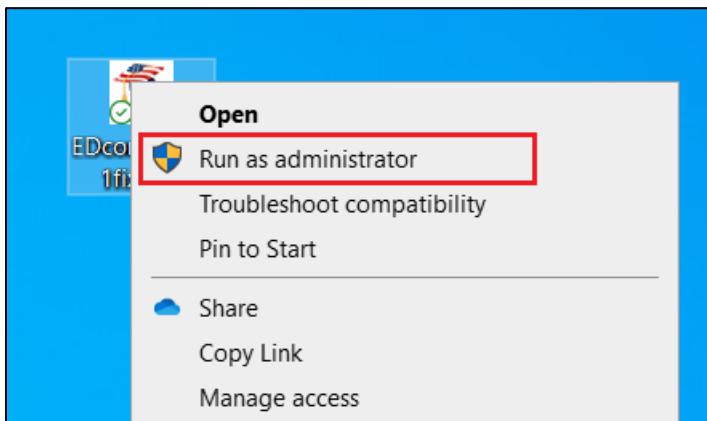
## Getting Started

### Install EDconnect 8.6.1

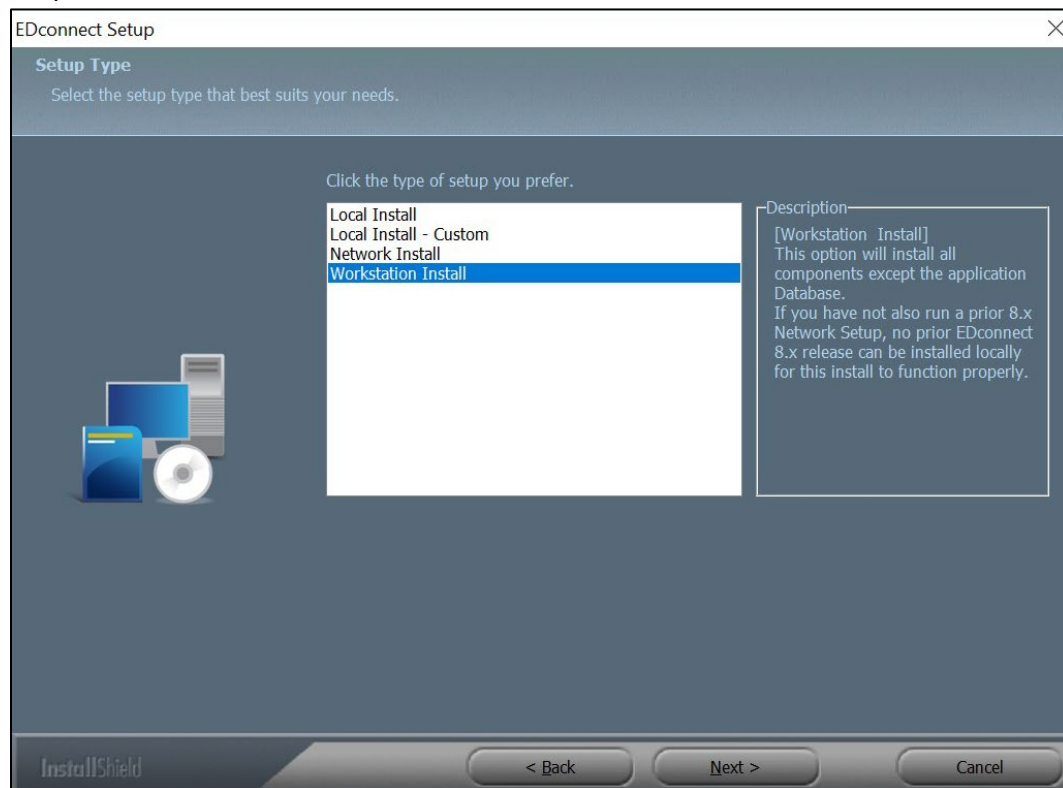
Your goal with this section is to download and install the 8.6.1 version of EDconnect.

1. Download the updated [EDconnect 8.6.1](#) file (EDconnect861fix.exe) to begin the installation.

2. Right-click on the downloaded file and choose **“Run as administrator”**.

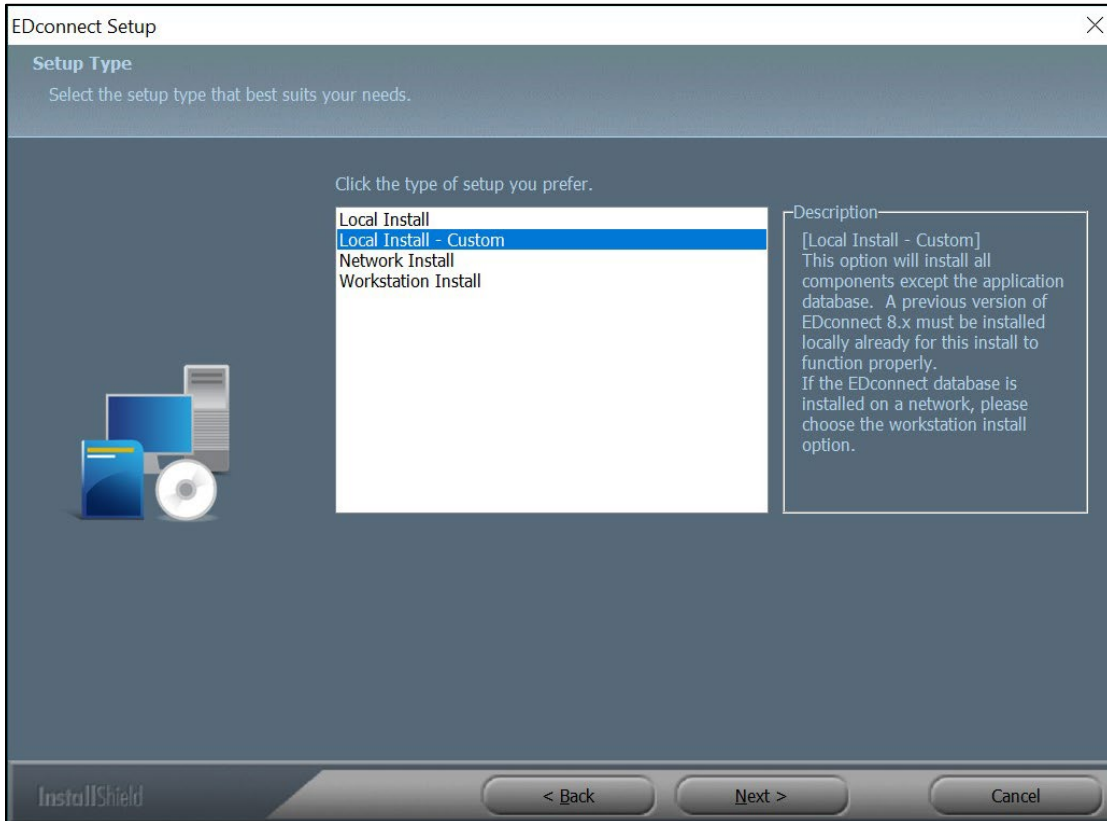


3. Click **“Next”** until the Installation Type screen appears. You will be presented with four setup types. **“Workstation Install”** and **“Local Install – Custom”** are the most frequently used options.



- a. If your database is on a network or shared drive, select the **“Workstation Install”** setup type and click **“Next”**.
  - i. Accept the default EDconnect program file location.
  - ii. Say **“Yes”** to allow an overwrite of the existing EDconnect installation.
  - iii. Enter the location of the existing database on your network or shared drive. (Tip: As noted above, the location of your database can be found in the lower right-hand side of the log in screen of your current working installation of EDconnect.)

- iv. Continue to click **“Next”** until setup is complete.
- b. If your database is on your local hard drive, select the **Local Install – Custom** setup type and click **“Next”** until setup is complete. (Tip: if you are unsure if your database is local or not, you can look for a file at c:\iam\database. If the file is in that location, that confirms you have a local installation.)



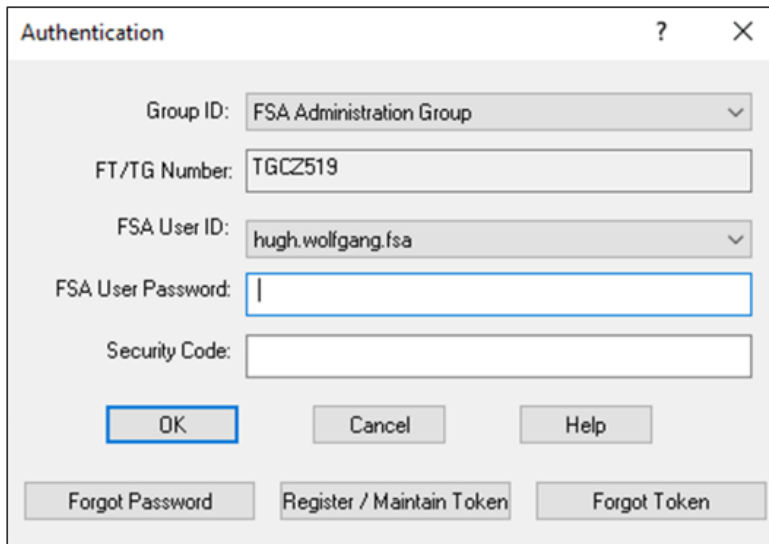
4. Once your setup is complete, it is recommended to restart your computer.

## Add the FTI group to your installation of EDconnect

Your goal with this section is to create a new user group for use with your new EDconnect installation.

1. Launch EDconnect 8.6.1.

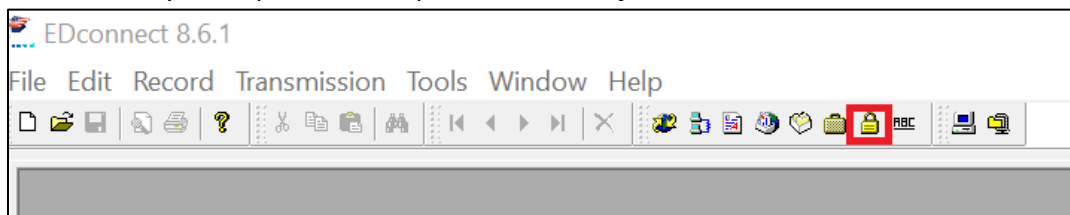
2. Select the “**FSA Administration Group**” and log in with your TG Mailbox Number (FT/TG Number), FSA User ID, FSA User Password, and six-digit Security Code.



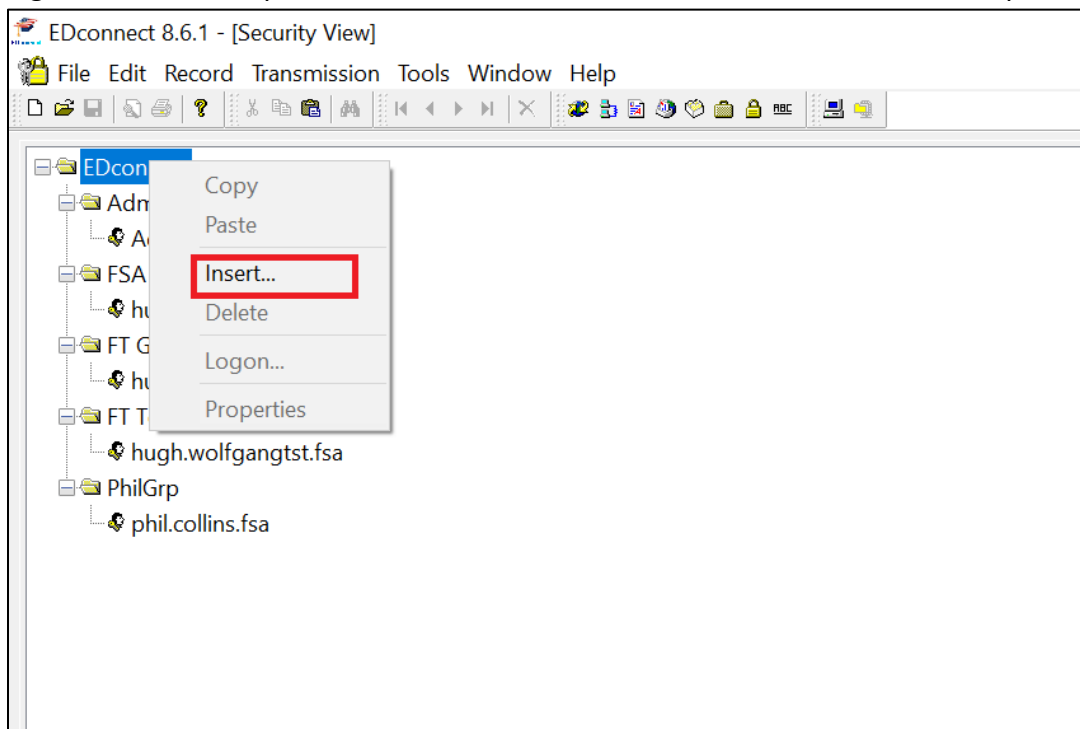
The Authentication dialog box contains the following fields and buttons:

- Group ID: FSA Administration Group (dropdown menu)
- FT/TG Number: TGCZ519 (text field)
- FSA User ID: hugh.wolfgang.fsa (dropdown menu)
- FSA User Password: (empty text field)
- Security Code: (empty text field)
- Buttons: OK, Cancel, Help, Forgot Password, Register / Maintain Token, Forgot Token

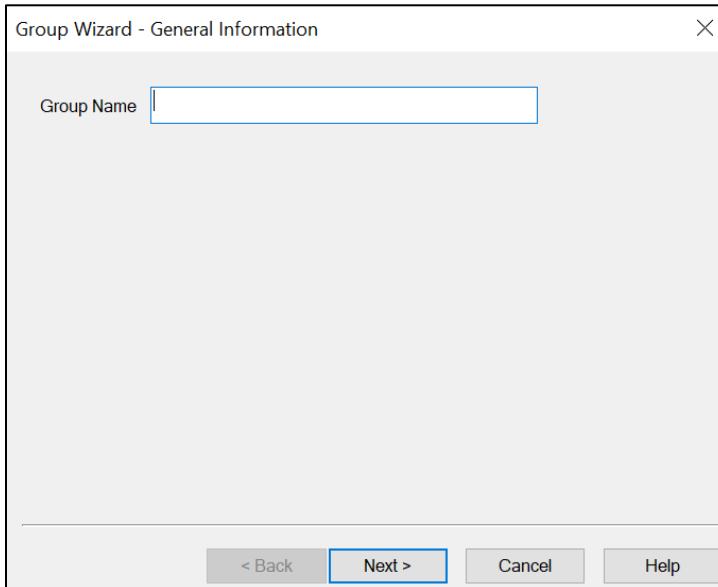
3. Click on the yellow padlock to open the **Security View**.



4. Right-click on the top EDconnect folder and choose “**Insert**” from the menu options.

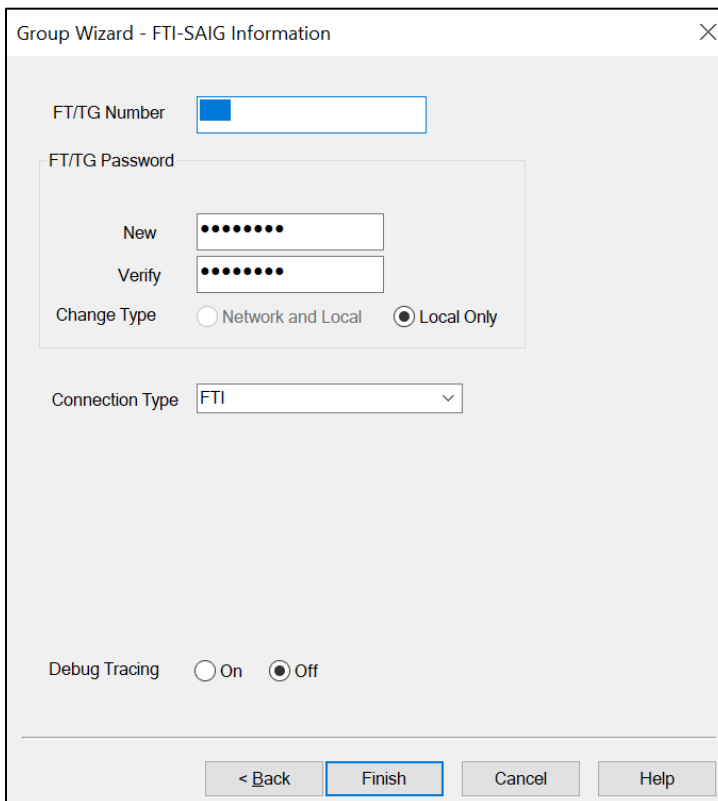


5. Enter your FT number (Example: **FTxxxxx**) in the **Group Name** field and click **“Next”** twice.



The dialog box is titled "Group Wizard - General Information" and has a close button (X) in the top right corner. It contains a single text input field labeled "Group Name". At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Cancel", and "Help". The "Next >" button is highlighted with a blue border.

6. Reenter your FT number in the FT/TG number field at the top. In the **“New”** and **“Verify”** fields, enter the default password, which is an 8-digit number comprised of the Primary DPA’s four-digit birth year and the last four numbers of their Social Security Number. Select the radio button for **“Local Only”** for **“Change Type”**, then set **“Connection Type”** to **“FTI”**.

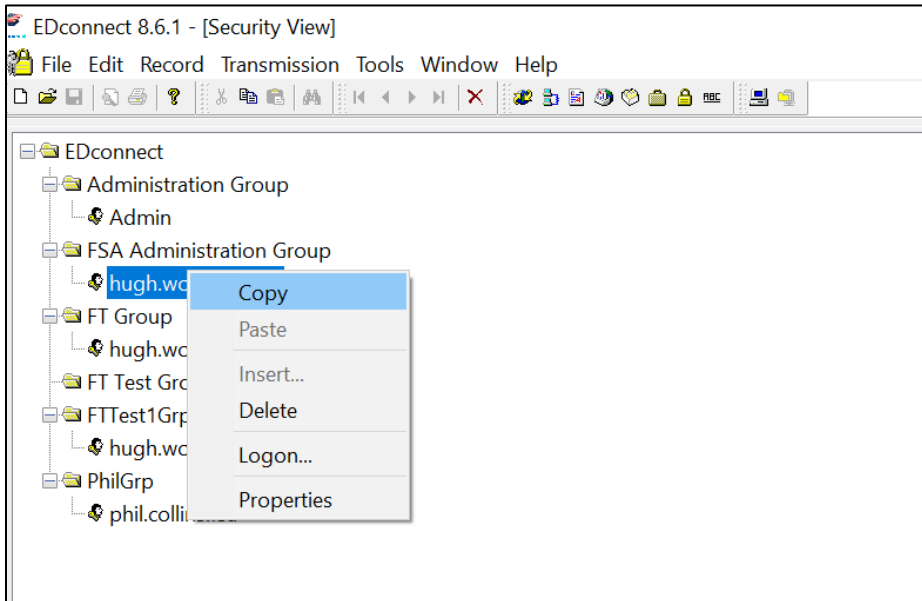


The dialog box is titled "Group Wizard - FTI-SAIG Information" and has a close button (X) in the top right corner. It contains several fields and controls:

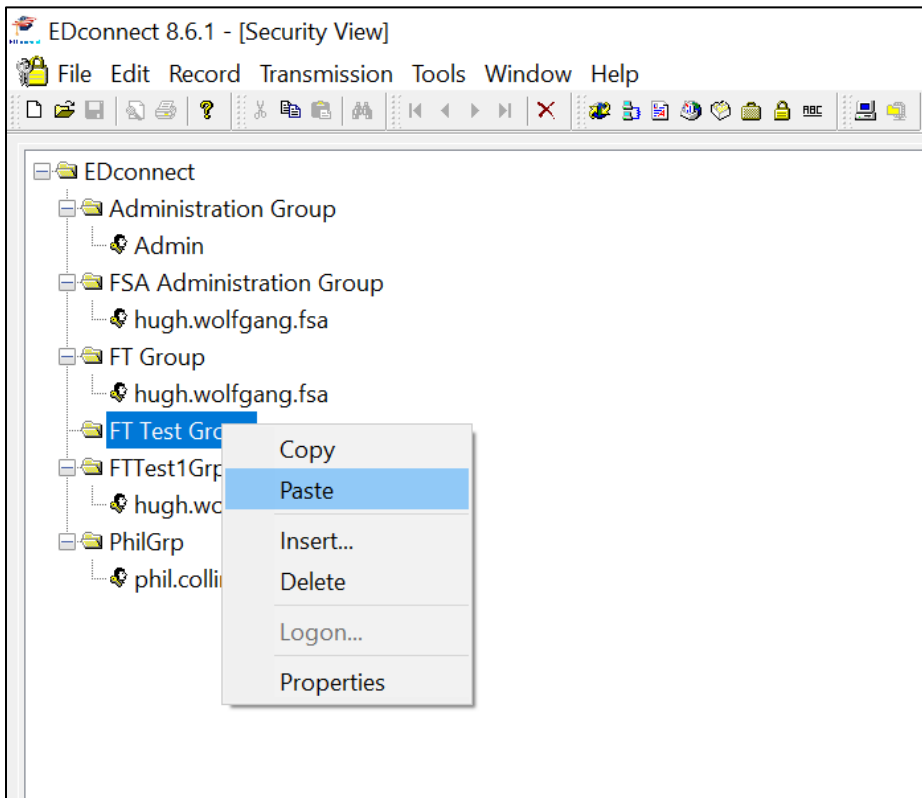
- FT/TG Number:** A text input field with a blue icon on the left.
- FT/TG Password:** A section containing two text input fields, "New" and "Verify", both filled with dots.
- Change Type:** Two radio buttons, "Network and Local" (unselected) and "Local Only" (selected).
- Connection Type:** A dropdown menu with "FTI" selected.
- Debug Tracing:** Two radio buttons, "On" (unselected) and "Off" (selected).

At the bottom of the dialog, there are four buttons: "< Back", "Finish", "Cancel", and "Help". The "Finish" button is highlighted with a blue border.

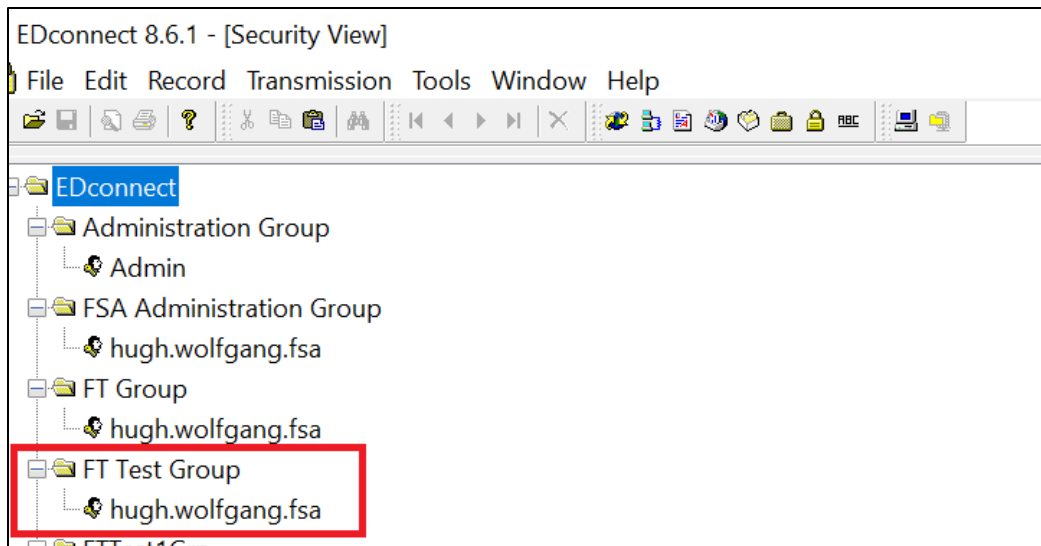
7. Click **"Finish"**.
8. Now you that you have a new user group, right click on your FSA User ID under a pre-existing group and select **"Copy"**.



9. Once copied, right-click on the new user group you created and click **"Paste"**.



Your FSA User ID will now appear under the new user group.



10. At this point, you can log out of EDconnect and proceed to log into the FTI-TDCM portal.

## Procedure for Downloading Additional Files and Obtaining Approval Code

The objective of this section is to guide you through the process of downloading the tdclient.ini file, obtaining the certificate (.rtm file) specific to your institution, and to record your Approval Code required for the certificate import process.

1. Enter the URL "<https://ftisaigportal.ed.gov/tdcm>" in the address bar of your web browser and press enter. The URL will take you to the login screen.

2. Enter your FSA User ID in the **FSA User ID** field.
3. Enter your FSA User ID Password in the **Password** field.
4. Enter the six-digit Security Code from your Security Token in the **OTP** field.
5. Enter your FT Number (example: **FTxxxxx**) in the **Mailbox Id** field.
6. Click the **Login** button.
7. All FTI-TDCM users will see the FSA Security Banner Screen upon login.
8. Navigate to the "**Participants**" view, and then select the "**Security**" tab.



9. Select the **“Export INI”** button to download the tdclient.ini file. (TIP: You will need to find this file later, so consider downloading it to your Desktop or Downloads folder)

**PARTICIPANTS**

Name: \*

EDI Name: \*

[Change Password](#)

Server Name: \*

AS2 Name:

Primary URL: \*

User Logon/Mailbox: \*

EDI Qualifier: \*

Approval Code:

Approval Status:

Secondary URL:

Save

Contact

Enabling

Security

ISA Fields

Key Exchange

Type	Status	Start Time	End Time	Issuer
X509	Current	Aug 3, 2023 01:42:45 PM	Aug 3, 2024 01:42:45 PM	

Export Runtime

Export INI

10. Select the **“Export Runtime”** button to download the .rtm file. (TIP: You will need to find this file later, so consider downloading it to your Desktop or Downloads folder)
11. You now should have a tdclient.ini file and a .rtm file that’s associated with your institution's name and FT number.
12. Finally, record the Approval Code from this screen for use when installing the .rtm file in the next section.

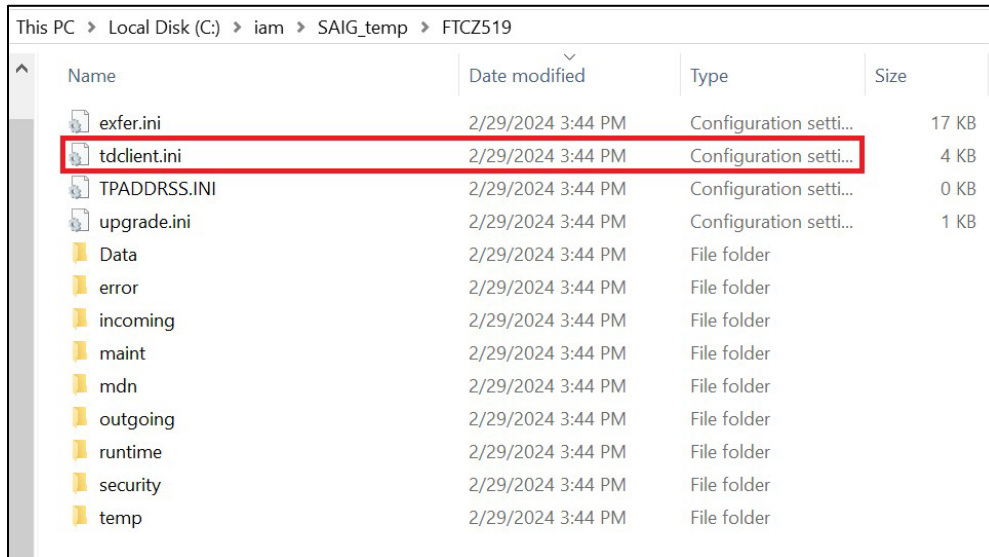
## Procedure for Placing the tdclient.ini File and RTM File into Their Correct Locations.

The objective for this section is to guide you in placing the downloaded tdclient.ini file and the RTM file into the appropriate folders on your computer. One suggested method for achieving this is as follows:

### tdclient.ini File:

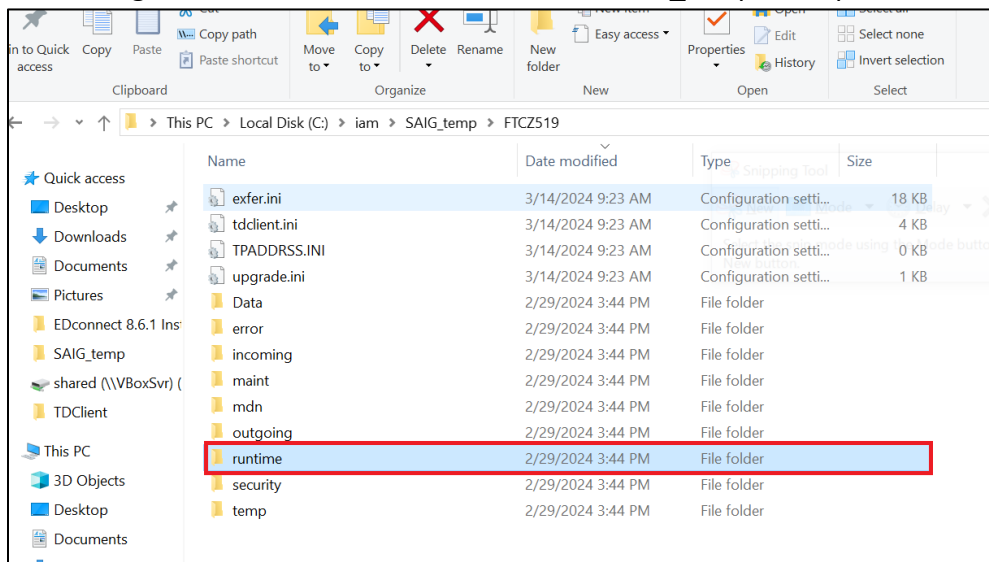
1. First, Press the "Windows" key on your keyboard or click on the "Start" button in the bottom-left corner of your screen.
2. Type "File Explorer" into the search bar and press "Enter" or select "File Explorer" from the search results then navigate to Windows in your C: drive (Windows (C:)).
3. Next, navigate to the IAM folder, locate and open the **“SAIG\_temp”** folder.
4. Inside the **“SAIG\_temp”** folder, open the folder that corresponds to your specific FT number (example: **“C:\IAM\SAIG\_temp\FTxxxxx”**).
5. Now, locate the downloaded tdclient.ini file. Typically, it will be in your **“Desktop”** or **“Downloads”** folder or the location where you saved it during the download process. Right click on the file and select **“Copy”**.

- Right click anywhere within the “C:\IAM\SAIG\_temp\FTxxxxx” folder you have open and choose “Paste”. You will receive a message allowing you to replace the existing tdclient.ini file.



#### **RTM File:**

- Follow steps 1-4 as you did for tdclient.ini file.
- Navigate to where you downloaded the .rtm file, right click the file, and select “Copy”.
- Then navigate to the FTxxxxx folder within the SAIG\_temp and open the runtime folder.



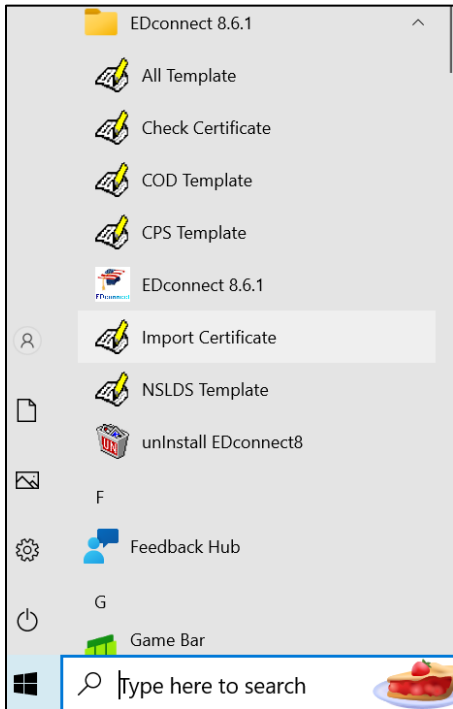
- Right-click within the runtime folder and choose “Paste”. The file will now be visible in the folder.
- Right-click on the .rtm file you just pasted, select “Rename”, and rename the file to match your FT Number (example: **FTxxxxx.rtm**)

**Important Note:** You must ensure there are no spaces when renaming the file.

## Procedure for Importing the .rtm file (security certificate)

The objective for this section is to guide you in importing your security certificate.


1. Open the Windows Start menu and open the “**EDconnect**” folder. You are looking for the “**Import Certificate**” icon. (**Tip:** your folder may have a version number after it, such as “**EDconnect 8.6.1**”. If you have multiple “**EDconnect**” folders, you may need to look in each folder for the icon)




2. Click on the “**Import Certificate**” icon to open the command line interface.




3. Type the full path name to the downloaded .rtm file and hit “**enter**” on your keyboard. For example, if your .rtm file was named “**FTxxxxx.rtm**”, the full path would be:  
C:\iam\SAIG\_temp\FTxxxxx\runtime\FTxxxxx.rtm

 Import Certificate  
  
C:\Program Files (x86)\EDconnect8>.\import.exe  
  
Enter full pathname of 'rtm' file from KeyManager:  
C:\iam\SAIG\_temp\FTCZ519\runtime\SAIGFTCZ519.rtm

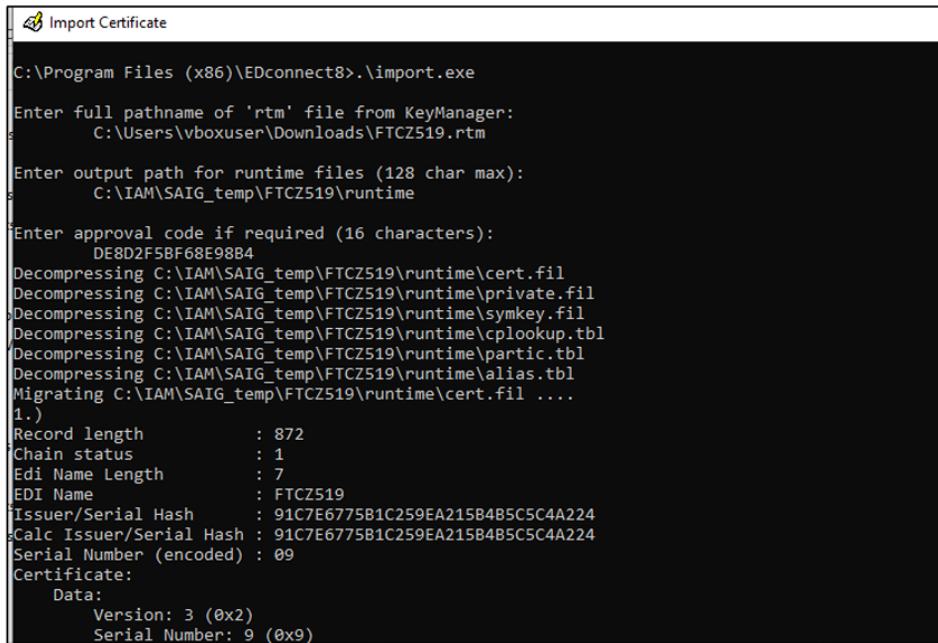
4. You should see a prompt to “Enter output path for runtime files”. Enter “C:\IAM\SAIG\_temp\FTxxxxx\runtime” (remember to replace “FTxxxxx” with your real FT number in the path) and hit “enter” on your keyboard.

 Import Certificate  
  
C:\Program Files (x86)\EDconnect8>.\import.exe  
  
Enter full pathname of 'rtm' file from KeyManager:  
C:\iam\SAIG\_temp\FTCZ519\runtime\SAIGFTCZ519.rtm  
  
Enter output path for runtime files (128 char max):  
C:\iam\SAIG\_temp\FTCZ519\runtime\_

5. You will be asked to enter the Approval Code “if required”. It is required, so go ahead and enter the Approval Code that you saved in Step 12 of the “Procedure for Downloading Additional Files and Obtaining Approval Code” section. Hit “enter” on your keyboard.

 Import Certificate  
  
C:\Program Files (x86)\EDconnect8>.\import.exe  
  
Enter full pathname of 'rtm' file from KeyManager:  
C:\iam\SAIG\_temp\FTCZ519\runtime\SAIGFTCZ519.rtm  
  
Enter output path for runtime files (128 char max):  
C:\iam\SAIG\_temp\FTCZ519\runtime  
  
Enter approval code if required (16 characters):  
36424F4456595032\_

6. The runtime certificate will now install, and you will see many lines of code scroll by. This is normal, and here is an example of what this may look like at the start of the import:



```
Import Certificate

C:\Program Files (x86)\EDconnect8>.\import.exe

Enter full pathname of 'rtm' file from KeyManager:
C:\Users\ vboxuser\Downloads\FTCZ519.rtm

Enter output path for runtime files (128 char max):
C:\IAM\SAIG_temp\FTCZ519\runtime

Enter approval code if required (16 characters):
DE8D2F5BF68E98B4

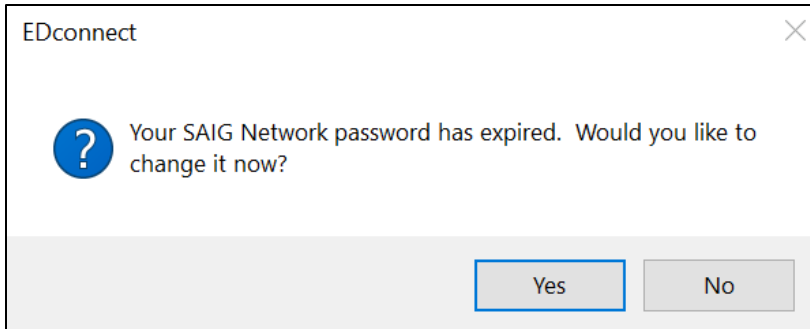
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\cert.fil
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\private.fil
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\symkey.fil
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\cplookup.tbl
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\partic.tbl
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\alias.tbl
Migrating C:\IAM\SAIG_temp\FTCZ519\runtime\cert.fil ...
1.)
Record length      : 872
Chain status       : 1
Edi Name Length    : 7
EDI Name           : FTCZ519
Issuer/Serial Hash : 91C7E6775B1C259EA215B4B5C5C4A224
Calc Issuer/Serial Hash : 91C7E6775B1C259EA215B4B5C5C4A224
Serial Number (encoded) : 09
Certificate:
  Data:
    Version: 3 (0x2)
    Serial Number: 9 (0x9)
```

7. Press any key to continue, as prompted.
8. Your certificate is now imported and ready to be used by EDconnect.

## Log into EDconnect, reset your password, and query your FT Mailbox

Your goal in this section is to reset your password and finish your FT Mailbox setup.

1. Launch EDconnect 8.6.1 and log into your FT mailbox with your FSA User ID, Password, and six-digit Security Code.
2. If EDconnect asks you to **“test the connection”**, choose to skip the test (you may not see this).
3. If EDconnect asks you to **“select the connection”**, choose **“ok”**, and in the following window select **“direct connection”** in the dropdown menu and click **“ok”** (you may not see this).
4. Select **“Transmission”** from the top menu bar, and then select **“Now”** in the sub-menu that appears.
5. You will see a message that your password has expired. This is because you are still using the default password, we set up in Step 6 of the “Add the FTI group to your installation of EDconnect” section.



6. Agree to change the password, which will then take you to a page where you can do just that.

A "Group Properties" dialog box with tabs for "General", "Access", and "Network". The "Network" tab is selected. It contains the following fields and options:

- FT/TG Number: A text box containing "FTCZ519".
- FT/TG Password: A section with two sub-fields:
  - New: A text box.
  - Verify: A text box.
- Change Type: Two radio buttons, "Network and Local" (selected) and "Local Only".
- Connection Type: A dropdown menu showing "FTI".
- Debug Tracing: Two radio buttons, "On" and "Off" (selected).

At the bottom are "OK", "Cancel", and "Help" buttons.

7. Enter a new password into the "**New**" and "**Verify**" fields. The password must:
  - a. Have a minimum length of 15 characters
  - b. Contain at least one uppercase letter (A-Z)
  - c. Contain lowercase letters (a-z)
  - d. Contain at least 1 numeral (0-9)
  - e. Contain at least 1 of the following special characters: @, #, or \$
8. Select the "**network and local**" radio button and click "**ok**".
9. You will get a message that says, "Your FT/TG password change has been added to the transmission queue". Click "**ok**".

10. Repeat step 4: Select **"Transmission"** from the top menu bar, and then select **"Now"** in the sub-menu that appears.
11. EDconnect will run, query the FT Mailbox, and you should receive a message that says, **"Transmission successful"**. Your FT Mailbox setup is now complete.