Installation Guide for

DL Tools for Windows

Release 16.0

U.S. Department of Education

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Introduction

Preface

William D. Ford Federal Direct Loan Tools for Windows (DL Tools) is a multi-year 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.

DL Tools was developed to process data for multiple program years. Release 16.0 contains functionality for the 2014-2015, 2015-2016, and 2016-2017 cycles. We removed all functionality related to the 2013-2014 cycle.

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 *2016-2017 Common Origination and Disbursement (COD) Technical Reference*.

The Disbursement Measurement Tool Report (available in DL Tools if connected to EDExpress) and certain Direct Loan lists with tolerances (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 *2016-2017 COD Technical Reference*.

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 [Direct Loan Bulletin (DLB) 02-36](#) 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

Access 2002

The DL Tools database uses a Microsoft Access 2002 format. Note the following:

- Access 2002 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 DL Tools.

- Do not open or view the DL Tools database using a version of Microsoft Access other than Access 2002. If you open the database using a version of Microsoft Access released before or after Access 2002, 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 any version of 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 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

While we do not officially support the Microsoft Windows 8 or Windows 7 operating systems for use with our EDESuite PC products (including EDExpress and DL Tools), we have performed compatibility testing with each operating system and resolved the majority of the issues discovered during testing.

- In September 2015, we tested Microsoft Windows 8 as an operating system during our development of the 2016-2017 version of our EDESuite PC software. Our test results indicated that schools should be able to proceed with use of Windows 8 without encountering any issues.

- In 2012, we tested Microsoft Windows 7 as an operating system during the development of the 2012-2013 versions of our EDESuite PC software. Our test results indicated that schools should be able to proceed with use of Windows 7 without encountering any major issues, largely due to enhancements we implemented previously for the Windows Vista operating system. For more information on our Windows 7 testing, see the [August 8, 2012 electronic announcement](#) posted to the IFAP Web site.

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

Note: You will receive warning messages at the start of the DL Tools installation process if you are running a 64-bit version of Microsoft Windows or your PC has a 64-bit processor. Click **OK** to close these messages, which do not prevent you from proceeding with the installation process.

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 or directly read the contents of software grid cells. To accommodate these restrictions, DL Tools includes the following features:

- 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.

- All DL Tools grids display "floating" text descriptions of the contents of grid cells when cells are selected. The text displays one cell above (or below, if the first cell is selected) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time, or using the Tab key or arrow keys to move from a cell, hides the text.

For more information on DL Tools functionality related to Section 508, see the Help topic "Enable 508 Grid Functionality?" in DL Tools, Release 16.0.

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 U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

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
- FSAdownload Web site
- Downloading documentation and software from the FSAdownload Web site
- 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\DL 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.

FSAdownload Web Site

You must download the DL Tools software from the FSAdownload Web site, located at fsadownload.ed.gov. The software installation file is called DLTool16X.exe, where "16X" is the release number (for example, DL Tools Release 16.0's single install file is called DLTools160.exe). See "Downloading Software from the FSAdownload Web Site" in this guide for more details.

Installation Steps at a Glance

Step	Action	Reference
1	Download all supporting documentation from the FSAdownload Web Site.	Read "Downloading Documentation from the FSAdownload Web Site" for instructions.
2	Download the software from the FSAdownload Web Site.	Read "Downloading DL Tools from the FSAdownload Web Site" for instructions.
3	Install the software.	Read the "Installing the Software on a Single-User System" section for instructions.

Downloading Documentation and Software from the FSAdownload Web Site

You can download Federal Student Aid software and documentation from the FSAdownload Web site, located at fsadownload.ed.gov. The FSAdownload Web site also stores user documentation such as the DL Tools Cover Letter and the *2016-2017 COD Technical Reference, Volume IV (DL Tools)* if you need more information and guidance regarding DL Tools.

Downloading Documentation from the FSAdownload Web Site

You can download DL Tools documentation from the FSAdownload Web site in Adobe PDF (Portable Document Format).

The following documents provide important information regarding DL Tools:

- *DL Tools Release 16.0 Cover Letter*

- *2016-2017 Common Origination and Disbursement (COD) Technical Reference,* Volume IV (DL Tools)

Each document description includes posting date, file size, and approximate download time. The download time depends on the file's size and your Internet connection speed.

To Download Documentation

1. Go to the address field located at the top of your Web browser's window and type **fsadownload.ed.gov**. You may need to press the **Enter** key or click the **Go** button.

2. To download the *DL Tools Release 16.0 Cover Letter*:

   - Click the **Software and Associated Documents** link.
   - Click **DL Tools Release 16.0** to the left of the description to view the DL Tools Release 16.0 software download page.

   To download 2016-2017 COD Technical Reference, Volume IV (DL Tools):

   - Click the **Technical References and Guides** link.
   - Click the **2016-2017** link under **COD Technical Reference** to view the download page.

3. Click the **PDF Format** link associated with the file you want to download.

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 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 from the FSAdownload Web Site

The DL Tools software is available for download from the FSAdownload Web site as a single installation file.

1. Go to the address field located at the top of your Web browser's window and type **fsadownload.ed.gov**. You may need to press the **Enter** key or click the **Go** button.

2. Click the **Software and Associated Documents** link on the left side of the page.

3. Click the **Direct Loan Tools Release 16.X** (where X is the release number) link. You are taken to the download site.

4. 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**.

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

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

6. After the file is downloaded, go to the saved location and double-click **DLTool16X.exe** (where 16X 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 from the FSAdownload Web site 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.

Important Note on 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.

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 16.0 to one, 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 database (**DLT.mdb**), program files (including **DLT.exe**), and annotations you may have made to DL Tools Help.

2. **Stand Alone Custom.** For DL Tools for Windows, Release 16.0, Stand Alone Custom is the default 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 15.0 to Release 16.0, or from Release 16.0 to Release 16.1), select the Stand Alone Custom installation option and choose all components except Database (*.mdb). This is the default selection.

   - If you previously installed a full release of DL Tools, you can use the Stand Alone Custom option to add files such as Help files (*.chm), the executable (*.exe) file, or the database (*.mdb) if you did not choose these components when you initially installed the software.

     Caution: Selecting **Database** during a Stand Alone Custom installation overwrites your existing DL Tools database, including all student data.

The database is updated with Release 16.0 changes the first time you access DL Tools after running Stand Alone Custom installations on each PC workstation. After this update is complete, you will no longer be able to access data in this database using DL Tools Release 15.0.

Important Note on Backups: You cannot access 2013-2014 data in your DL Tools database after you upgrade from Release 15.0 to Release 16.0. We strongly recommend you create a backup copy of your Release 15.0 database (**DLT.mdb**) before upgrading to Release 16.0. In the future, you may need to access your 2013-2014 data using an earlier version of DL Tools on another PC.

Steps to Install

1. After closing all running Windows applications, go to the location of the **DLTool16X.exe** (where "16X" is the release number) file you downloaded from the FSAdownload Web site.

2. Double-click the **DLTool16X.exe** file to start the installation. The file unpacks itself into a temporary folder and continues the installation.

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. You are prompted to restart your computer to complete the installation.

Installing Subsequent Releases

When you install an update release of the DL Tools software (for example, from Release 16.0 to a version of the same year, such as Release 16.1), 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 16.0, an installation log is created in the Windows directory of the workstation (for example, **C:\Windows**) named **DLTools16X.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 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 a DL Tools database (DLT.mdb) restoration or after relocating the database from one PC or LAN folder to another directory.

Note: You must be an Administrator on your workstation to modify the DL Tools database location using the Registry function in either Windows Vista or Windows 7 operating systems. If you do not have Administrator rights, you will receive an error message when you try to edit the Registry.

To Change the Database Path

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

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

3. Click the **Registry** button.

    – A Registry Viewer application displays with a split view.
    – In the left frame, you see a tree-style view, and in the right frame, you see a list-style view with two fields: **Name** and **Value**.
        • Select **Direct Loan Tool** under "Year1617." If you do not see the "Year1617" label in the left frame, left-click the + (plus sign) next to EDESuite. A label indicating the software's year cycle appears under EDESuite.

4. On the right frame of the split window, find **Database** under the Name field, click it, and select **Edit**, **Edit** from the menu bar.

    – A New Registry Value dialog box displays with two entry fields.
    – One field is labeled "Name" (which is disabled) and the other field is labeled "Value."

5. Enter your **new database path** in the **Value** field. Include the full path and database name (DLT.mdb) as it displays in Windows Explorer, with uppercase and lowercase letters. Press **Enter** or click **OK**.

6. A message displays indicating the registry value is saved. Click **OK**.

7. Select **Exit**, **Exit** to exit the Registry Viewer.

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

9. **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.

Uninstall

To uninstall DL Tools, click **Start**, **Programs** from your Windows desktop and select **EDESuite**, **DL 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

The first time you start DL Tools, the Startup Information dialog box appears. Before you can use DL Tools, you must enter the default user ID and password and create a new password. We provide instructions for these tasks in this section.

Startup Information Box

The first time you launch DL Tools, you see the Startup Information dialog box. This dialog box displays various messages, warnings, or errors and may not appear during subsequent launchings of the software.

To View and Close the Startup Information Box

1. The first time you start DL Tools, the Startup Information dialog box appears.

2. Review the messages, warnings, or errors displayed.

3. Click **Close** or press **Enter** to close the Startup Information dialog box.

User ID and Password

Each time you start DL Tools, you must enter a 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 and establish your new password:

1. Enter the default user ID, **SYSADMIN**.

2. Enter the default password, **SYSADMIN**.

3. Enter a new password in the New Password box. You must change the default password by entering a new one in this field.

   You can enter up to eight alphanumeric characters.

4. Enter the new password again in the Verify Password field.

   The New Password and Verify Password must be the same.

5. Click **OK** to log in.

Note: The SYSADMIN user ID should be reserved for system administrator functions. Each user should have a unique user ID and password for logging into DL Tools to perform normal software functions.

See "Security Users dialog box" in the DL Tools Help system for information on setting up user IDs and passwords for your staff.

After you enter your new password, define your default Direct Loan school code, security users, and other DL Tools software settings by clicking **Tools**, **Setup** from the main DL Tools screen.

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.

Most recently, Federal Student Aid published minimum and optimal system configuration recommendations in a December 18, 2007 electronic announcement on the IFAP Web site.

Note: Check the IFAP Web site for the most recent guidance concerning minimum and optimal system configuration recommendations.

The following minimum and optimal hardware and software configurations are recommended for DL Tools, Release 16.0 users, per the December 18, 2007 electronic announcement:

Hardware/Software Device	Minimum Configuration	Optimal Configuration
IBM or Fully IBM-Compatible PC	1.2 GHz Processor	2.8 GHz/333 MHz Processor or better
	1 GB RAM	2 GB Dual Channel or better
	60 GB Hard Drive	250 GB Hard Drive
	48x CD-RW Drive	16X DVD+/-RW8 Drive
	IBM-compatible keyboard and mouse	IBM-compatible keyboard and mouse
Monitor and Video Card	Capable of Super Video Graphics Adapter (SVGA) resolution (800 x 600) or higher	Capable of Super Video Graphics Adapter (SVGA) resolution (1024 x 768) or higher
Internet Connection	56 Kbps modem (meets or is upgradeable to V.90 standard)	High-speed Internet connection (for example DSL, cable modem, or fiber optic)
Printer	Laser printer (capable of printing on standard 8.5" x 11" paper)	Laser printer (capable of printing on standard 8.5" x 11" paper)
Operating System	Windows 2000 Professional at a minimum	Windows XP Professional

Note: Although all of the designated electronic processes can be performed using the minimum configuration, we strongly recommend the optimal configuration, particularly if a school sends or receives 4,000 or more records in an Extensible Markup Language (XML) document (batch). This is because the XML file formats used by the EDExpress software and the Common Origination and Disbursement (COD) System are large and require increased storage and computing capabilities.

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:

- Network Operating System: Novell NetWare versions 3.12 or above or 4.11 or above, Windows 2000 Server, Windows 2000 Advanced Server, or Windows 2003 server

  Note: Novell NetWare versions 3.12 and 4.11 are separate products.

- 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 desktops or remote access configurations
- WANs (Wide Area Networks)
- Peer-to-Peer configurations

See "Hardware and Software 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.

   Important Installation Note: If you want to upgrade from Release 15.0 to Release 16.0 and carry your 2014-2015 and 2015-2016 data forward into your Release 16.0 database, do not select the Network Server option. Instead, only perform Workstation installations on all PCs that currently have Release 15.0 installed.

   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. If you have a DL Tools database (DLT.mdb), the Network Server option overwrites your database, resulting in a loss of all existing 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 16.0 to a workstation for the first time, to upgrade from Release 15.0 to Release 16.0, or to install a subsequent upgrade release (for example, from Release 16.0 to Release 16.1) 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.

The database is updated with Release 16.0 changes the first time you access DL Tools following completion of your Workstation installations. You will no longer be able to access data in this database using DL Tools Release 15.0 after this step.

Important Note on Backups: You cannot access 2013-2014 data in your DL Tools database after you upgrade from Release 15.0 to Release 16.0. We strongly recommend you create a backup copy of your Release 15.0 database (**DLT.mdb**) before upgrading to Release 16.0. In the future, you may need to access your 2013-2014 data using an earlier version of DL Tools on another PC.

Important Note on 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.

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 (**DLT.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 (**DLT.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 (**DLT.mdb**) 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 (**DLT.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\DL 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.

Subsequent LAN Installation

To Install DL Tools on a LAN Where the Software Is Already Installed

1. You should first create a reliable, functioning backup version of your existing DL Tools database (**DLT.mdb**) before upgrading to a new release.

2. Do *not* use the **Network Server** installation option for a subsequent LAN installation of DL Tools. The **Network Server** installation option is only for users installing DL Tools for Windows to a LAN for the first time. Choosing this installation option installs an empty DL Tools database file (**DLT.mdb**) on the LAN, overwriting your existing database.

   If you select the **Network Server** installation option for a subsequent LAN installation of the DL Tools software, the installation program alerts you that the DL Tools for Windows database has been installed in the specified directory. Click **OK** to return to Setup and select a different installation option.

3. Click the **Workstation** installation option.

4. When prompted for the DL Tools for Windows database (**DLT.mdb**) location, provide the location of your existing 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 DL Tools.

If this is a first-time upgrade to DL Tools Release 16.0 (from Release 15.0), 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 DL Tools 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 DL Tools.

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

To Install Subsequent and Future Releases

For all future releases of DL Tools for Windows, Release 16.0 (for example, Release 16.1), 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 Server Compatibility

DL Tools can be used as single-user or multi-user software. It can be run on the following network operating systems:

- Novell NetWare 3.x, 4.x, and 5.x

- Windows 2000 Server

- Windows 2000 Advanced Server

- Windows 2003 Server Family

Caution: DL Tools makes extensive use of Microsoft Access as a database engine, so you should not run the software on peer-to-peer networks. For additional guidance, see the "LAN Hardware and Software Recommendations" section earlier in this installation guide.

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.

LAN Messages

Novell

These messages notify users when a locking situation occurs:

LAN Error Message

Condition

<Database> is locked and cannot be accessed at this time.

If the database remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point before execution.

Record in use - Retry later.

If the record remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point before execution.

Function in use - Retry later.

If the function remains locked after five seconds of continual attempts, you are returned to the menu bar.

Additional LAN Instructions

If you are using a Novell NetWare product, enter the following commands from the NetWare Server Console prompt:

Set Maximum Record Locks Per Connection = 10000

This line should also be added to the AUTOEXEC.ncf file on the NetWare server.

Windows Administrator Rights

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.

For more information, visit microsoft.com and search for "file protection" to view Microsoft articles explaining the technical details of Windows file protection.

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:

<div align="center">

800/330-5947

TDD/TTY: 800/511-5806

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

CPSSAIG@ed.gov

</div>

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

For a complete listing of all Federal Student Aid sources of assistance, go to the IFAP Web site.