Installation Guide for

EDExpress for Windows

2015-2016

U.S. Department of Education

F E D E R A L
STUDENT AID

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Introduction

Preface

EDExpress 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 EDExpress:

- Application Processing—For managing your Free Application for Federal Student Aid (FAFSA) application data. EDExpress 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 originating William D. Ford Direct Loans, printing Master Promissory Notes (MPNs), and submitting disbursement records.

- 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.

EDExpress 2015-2016, 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 *EDExpress for Windows 2015-2016 Cover Letter* associated with each release for a comprehensive list of enhancements. You can download the Cover Letter and related user documentation from the U.S. Department of Education's (ED's) Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

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 Financial Aid Shopping Sheet
- 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

Access 2002

The EDExpress 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 EDExpress.
- Do not open or view the EDExpress 2014-2015 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 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 EDExpress 2015-2016 in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall EDExpress. After an Administrator has installed EDExpress, 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 EDExpress software.

Microsoft Windows 7, Windows Vista, and Windows 8 Information

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

- 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 Information for Financial Aid Professionals (IFAP) Web site located at ifap.ed.gov.

- In 2008, we tested Microsoft Windows Vista as an operating system for our EDESuite PC products. We communicated our original Vista testing results, issues we discovered, and steps schools needed to take in order to run EDExpress on Vista operating systems in the September 18, 2008 electronic announcement posted on the IFAP Web site. The vast majority of Windows Vista issues discussed in the announcement have been resolved, most recently in our 2012-2013 PC software releases.

Note: Federal Student Aid has not yet tested the Microsoft Corporation's Windows 8 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 8 compatibility testing. Additional information will be provided as it becomes available.

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. Screen reader software cannot interpret color shading in EDESuite software entry fields or directly read the contents of software grid cells. To accommodate these restrictions, 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.

- All software grids display "floating" text descriptions of the contents of grid cells when cells are selected. The text appears 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.

For more information on EDExpress functionality related to Section 508, see the help topic "Enable 508 Grid Functionality?" in EDExpress 2015-2016.

Demographic Record

The EDExpress 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.

You can open a student's record directly from the EDExpress toolbar by:

- Typing the original or current Social Security Number (SSN) and clicking Open, or

- Selecting the student's original SSN or current SSN by clicking the ellipsis (...) button and clicking OK, then clicking Open, or

- Clicking the ISIR button to pick a student's ISIR from a list and clicking OK, then clicking Open.

You can also select **File**, **Open** from the menu bar or press **Ctrl-O** to initiate opening a record. Either action places the cursor in the Original SSN field in the toolbar.

If you have a student's record open, you can open another record by entering or selecting the SSN or ISIR from the toolbar. The first record closes automatically, prompting you to save changes. The next student's record opens to the same module and tab as the previous record.

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 FSAdownload Web site.

Using this Installation Guide

Use the instructions contained in this Installation Guide to install EDExpress 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

Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing EDExpress 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 EDExpress
- Uninstalling the software

Folder Creation

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

C:\Program Files\EDESuite\EDExpress for Windows 2015-2016

C:\IAM\DATABASE

Caution: You can change the default drive and folder name for either directory during installation. However, if you use Microsoft Vista, 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.

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 EDExpress software update you receive for enhancements to be loaded properly.

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

FSAdownload Web Site

You must download the EDExpress software from the FSAdownload Web site, located at fsadownload.ed.gov. The software installation file is called express16rX.exe, where "X" is the release number (for example, EDExpress Release 1.0's single install file is called express16r1.exe). See "Downloading EDExpress from the FSAdownload Web Site" in this guide for more details.

Note: We have discontinued the posting of individual "disk" EDExpress installation files to the FSAdownload Web site.

Installation Steps at a Glance

Step	Action	Reference
1	Download all supporting documentation from FSAdownload.	Read "Downloading Documentation from the FSAdownload Web Site" for instructions.
2	Download the software from FSAdownload.	Read "Downloading EDExpress 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 houses user documentation, such as the EDExpress Desk References, Technical References, and Cover Letters, which provides more information and guidance regarding EDExpress.

Downloading Documentation from the FSAdownload Web Site

You can download EDExpress documentation in Adobe PDF (Portable Document Format).

The following types of documentation are available to download for EDExpress:

- *EDExpress for Windows 2015-2016 Cover Letters*
- *EDExpress for Windows 2015-2016 Desk References*
- *2015-2016 EDExpress Packaging Technical Reference*
- *2015-2016 Electronic Data Exchange (EDE) Technical Reference*
- *2015-2016 Common Origination and Disbursement (COD) Technical Reference, Volume III (Pell Grant, TEACH Grant, & Direct Loan Combination System Supplement)*

Each document description includes the posting date, the file size, and the download time. The download time for a document depends on the speed of your Internet connection.

To Download Documentation

1. Go to the FSAdownload Web site.

2. To download the *EDExpress 2015-2016 Cover Letter* or *EDExpress 2015-2016 Desk Reference* for a specific release:

   - Click the **Software and Associated Documents** link.
   - Click **EDExpress for Windows 2015-2016 Release X** (where X equals the latest version available, such as Release 1.0) to the left of the description to view the EDExpress 2015-2016 software download page.

   To download 2015-2016 technical references:

   - Click the **Technical References and Guides** link.
   - Click the **2015-2016** link under **COD Technical Reference**, **EDExpress Packaging Technical Reference**, or **Electronic Data Exchange Technical Reference** to view the download page for the specified technical reference.

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 then 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 have downloaded the document, go to the saved location and double-click the file to open and print it.

Downloading EDExpress from the FSAdownload Web Site

The EDExpress 2015-2016 software is available for download from the FSAdownload Web site as a single installation file.

1. Go to the FSAdownload Web site.

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

3. Click the **EDExpress 2015-2016 Release 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 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**.

5. 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.

6. After the file is downloaded, go to the saved location and double-click **express16rX.exe** (where X is the release number) to install EDExpress.

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 EDExpress 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.

Installing the Software on a Single-User System

Downloading EDExpress from the FSAdownload 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 EDExpress 2015-2016 in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall EDExpress. After an Administrator has installed EDExpress, 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 EDExpress software.

Installation Options

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

1. **Stand Alone Full.** Use this option when you are installing EDExpress 2015-2016 to a single, non-networked computer for the first time and want to install all available EDExpress modules.

    Warning for Installations Subsequent to Release 1.0: Exercise caution when using the Stand Alone Full installation option for EDExpress versions after Release 1.0. This option overwrites your existing EDExpress 2015-2016 database (**expres16.mdb**) and all program files (including **expres16.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 EDExpress, you can use the Custom option to add Help files (*.chm) or the database (*.mdb).

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

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

    Note: If you previously installed an EDExpress 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 **express16rX.exe** file (where X is the release number) from the [FSAdownload](#) Web site, go to the location of that downloaded file.

3. Double-click the **express16rX.exe** file to start the installation. The file unpacks itself into a temporary folder and continues the installation.

4. EDExpress asks you a series of questions during the installation. The default answer for each question is already selected for you. Under normal circumstances, you should accept the default answer.

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

   Caution: You can change the default drive and folder name for your EDExpress program files and your database during installation. However, if you use Microsoft Vista, 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.

   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 EDExpress 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 EDExpress installation process is complete, your Start menu is updated and displays an icon for EDExpress for Windows 2015-2016. However, desktop icons are not created automatically.

6. Restart your computer when prompted to complete the installation.

Installing Subsequent Releases

When you install an update release of the EDExpress 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.

Windows Installation Log

When you first install EDExpress 2015-2016, an installation log is created in the Windows directory of the workstation (for example, **C:\Windows**) named **Express21x.log**. The EDExpress installation log is updated during each 2015-2016 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 EDExpress installation directory, the Windows directory, the Windows system directory, whether or not a CD-ROM is available, screen resolution, disk space available, boot drive, install engine, extended memory, and information about files before and after installation. This information can be helpful to users and to CPS/SAIG Technical Support in researching software issues that may occur.

Changing the EDExpress Database Path

You can change the EDExpress database path from within the EDExpress software. System administrators may need to use this functionality following the restoration of a back-up EDExpress database (**expres16.mdb**) or **after** the relocation of the database from one PC or LAN folder to another directory.

To Change the Database Path

1. Open EDExpress 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 **Express** under Year1516. If you do not see the "Year1516" label in the left frame, left-click the + (plus sign) next to EDESuite. A label indicating the software's year cycle displays 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 edit boxes.

   – One box is labeled "Name" (which is disabled), and the other box is labeled "Value."

5. Enter your **new database path** in the box next to Value. Include the full path and database name (**expres16.mdb**) exactly as it displays in Windows Explorer, with uppercase and lowercase letters.

6. Press **Enter** or click **OK**.

7. A message displays indicating that the Registry value is saved. Click **OK**.

8. Exit the Registry Viewer by going to **File**, **Exit**.

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

10. **Exit** the EDExpress software.

The next time you start EDExpress, 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 EDExpress window.

Important Notes

- You must be an Administrator on your workstation to modify the EDExpress 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.

- If the Registry Viewer dialog box does not open when you click the Registry button, close the software, right-click the EDExpress for Windows 2015-2016 icon on your desktop or Start menu, and select "Run as Administrator."

- If you use Windows Vista, we strongly recommend you do not store your EDExpress database (**expres16.mdb**) in the Program Files directory on your C:\ drive. The EDExpress 2015-2016 database is installed by default to C:\IAM\DATABASE unless you change the directory to a different location during the installation process.

Uninstall

To uninstall EDExpress, click **Start**, **Programs** from your Windows desktop and select **EDESuite**, **EDExpress 2015-2016** to see an icon for the Uninstall utility.

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

To Uninstall EDExpress

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**.

EDExpress 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 EDExpress software before performing a Custom installation.

Getting Started

Logging In for the First Time

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

We provide instructions for these initial tasks in this section.

New for EDExpress 2015-2016! We are implementing a limited-time product registration feature in EDExpress 2015-2016, Release 2.0 to learn more about how your school or organization uses EDExpress and its various functions. See the "Product Registration" subsection below for more information.

Startup Information Box

The first time you launch EDExpress, 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.

Note: When you first access EDExpress 2015-2016 following installation, one of these messages alerts you that an Assumed School Code has not been defined. See the "Setting your Assumed School Code" section later in this guide for step-by-step instructions on establishing your Assumed School Code in EDExpress setup.

To View and Close the Startup Information Box

1. The first time you start EDExpress, the Startup Information dialog box displays.

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 EDExpress, 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 EDExpress for the first time and establish your new password:

1. Type in the default user ID, **SYSADMIN**.

2. Type in the default password, **SYSADMIN**.

3. Type a **new password** in the New Password box. You must change the default password by typing a new one in this field.

    You can enter up to eight alphanumeric characters. EDExpress passwords are not case-sensitive.

4. Type 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. All users should have a unique user ID and password for logging into EDExpress to perform routine or daily software functions.

Refer to the topic "Security Users dialog box" in EDExpress Help for information on setting up user IDs and passwords for your staff.

After you enter your new password, define your Assumed School Code and other EDExpress software settings by clicking **Tools**, **Setup** from the main EDExpress screen.

Product Registration

EDExpress 2015-2016, Release 2.0 (available spring 2015) will implement a limited-time product registration feature intended to gather more information about how your school or organization uses EDExpress to assist with future planning and enhancements.

The product registration feature will initiate after you install Release 2.0, log into the software, and run the database update process. You will continue to be prompted to complete the product registration process each time you access Release 2.0 prior to September 16, 2015 until you submit a response. EDExpress automatically removes the product registration prompt if your PC's system date is on or after September 16, 2015.

Note: The second page of the product registration process includes an option to temporarily bypass entry and submission of your responses. This option is only applicable to your current session of EDExpress.

The product registration process contains several different questions about the EDExpress modules and specific functionality you currently use; it also allows you to supply information about your student population size and whether you use EDExpress in combination with other systems in order to better understand your needs as a user.

An interactive summary report is displayed at the end of the product registration process, prior to the final submission step. You can click sections of the report to return to specific questions and revise your answers. At the successful conclusion of the product registration process, your responses are automatically transmitted to Federal Student Aid using the e-mail client on your PC.

Note: If you are a multi-campus school using a shared EDExpress database, we recommend that you designate a user from your main campus to respond to the product registration items to avoid duplicate or conflicting feedback.

Prior Year Data Dialog Box

If you have the prior year release of EDExpress installed, you can save time by using the EDExpress 2015-2016 Prior Year import feature to pull forward setup information and other data from your 2014-2015 database into your 2015-2016 database.

EDExpress 2015-2016 allows demographic data, most setup information, most queries, and any file formats you have created to be moved forward from the prior year. Pell Grant, TEACH Grant, and Direct Loan Prior Year Disbursement Profiles that are imported will need to be updated and saved before they can be used.

Data That Can Be Moved Forward from Your EDExpress 2014-2015 Database to your EDExpress 2015-2016 Database

- Demographic (Demo tab) data
- Query—Global, App Express, Packaging, Pell Grant, TEACH Grant, Direct Loan
- Global Setup

  - Security Groups
  - Security Users
  - Document Tracking
  - User-Defined Letter Text
  - System
  - File Management

  - File Formats
  - User Database
  - FAA Access
  - Financial Aid Shopping Sheet Profiles

- 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)
  - MPN Printer
  - **New for EDExpress 2015-2016!** CIP Codes
  - **New for EDExpress 2015-2016!** Program Profiles

The COD Setup, Pell, TEACH Grant, and Direct Loan Prior Year Import options are not available until you have installed EDExpress 2015-2016, Release 2.0.

New for 2015-2016! You can now import CIP Codes setup and Program Profiles setup parameters from the prior year's EDExpress database using the Prior Year User-Defined Queries, Setup, and File Formats import type. We also modified the import to pull forward Payment Period Start Date values associated with disbursement profiles associated with the prior year's Direct Loan module.

Note: If you import your disbursement profile codes from EDExpress 2014-2015, the codes are displayed with a read-only inactive flag until you update and save the codes with applicable 2015-2016 anticipated disbursement dates, payment period start dates, and date ranges for the Academic Year Start/End Date and Loan Period Start/End Date fields.

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

After logging in to Release 1.0 for the first time, you are prompted with the Prior Year Data dialog box, which enables you to import your prior year user-defined queries, setup, and file formats. If you do not want to perform this function at this time, but want to be reminded each time you log in, click **No** but do not select the **Don't show me this again** checkbox.

If you do not want to be reminded to perform this function, select the **Don't show me this again** checkbox and click **No**. You can import prior year data at any time by selecting **File** then **Import** from the menu bar, choosing **Global**, and selecting **Prior Year User-Defined Queries, Setup, and File Formats** as the Import Type.

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

1. Click **Yes** at the Prior Year Data dialog box.

2. Confirm that Prior Year User-Defined Queries, Setup, and File Formats displays as the Import Type.

3. Verify the location of your EDExpress 2014-2015 database (**expres15.mdb**).

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.

5. Click **OK**. The Prior Year Move dialog box displays.

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 displays.

   – 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 displays.

9. Click **OK** to close the In Progress dialog box.

10. (Optional) Print the Import Prior Year Queries, Setup, and File Formats report.

These imports are also available from the Import dialog box on the Global tab after you log in to EDExpress.

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.

Setting Your Assumed School Code

The first time you use EDExpress following installation, the Startup Information dialog box 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 EDExpress Global School 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 EDExpress 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. 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 displays 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 EDExpress.

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 EDExpress.

1. 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 EDExpress 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 EDExpress Global School setup.

Resetting Your User ID and Password

If you have forgotten your password, your EDExpress 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 EDExpress users, especially EDExpress administrators, should record their user IDs and passwords and keep them in a safe place.

If you are the EDExpress 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 required for EDExpress 2015-2016 users, per the December 18, 2007 IFAP electronic announcement:

	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. For the same reason, we encourage schools to consider moving away from "dial-up" and instead use high-speed Internet connections. Doing so will significantly reduce both transmission time and transmission interruptions.

Note: You must also have Microsoft Internet Explorer version 5.5 or higher to use the EDExpress interface with the FAA Access to CPS Online Web site.

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 EDExpress 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

EDExpress 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 EDExpress software running on a LAN server
- EDExpress 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)

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

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 EDExpress software to a LAN using one of three options:

1. **Network Server**. Use this option *only* when you are installing EDExpress 2015-2016 to a LAN for the first time. The Network Server option only installs the EDExpress database to a LAN location. It does not install the EDExpress 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 EDExpress database (**expres16.mdb**), 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 EDExpress 2015-2016 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 EDExpress software modules. You should also use the Workstation Full option to upgrade workstations to a new EDExpress 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 EDExpress 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 EDExpress, 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 EDExpress 2015-2016 in all supported Windows operating systems. If you are not an Administrator, you will receive a warning when you try to install or uninstall EDExpress. After an Administrator has installed EDExpress, 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 EDExpress software.

Installation Instructions

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

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

- If you are installing EDExpress 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 EDExpress (**expres16.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 EDExpress executable file (**expres16.exe**) to the workstation's hard drive rather than a LAN improves the speed and performance of the software, because EDExpress 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 EDExpress 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 EDExpress 2015-2016 database (**expres16.mdb**) on the LAN, not the EDExpress program files.

2. Enter the network server location where you want to install the EDExpress 2015-2016 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 EDExpress. The Workstation Full option installs all program files, including the executable file (**expres16.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 EDExpress.

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\EDESuite\EDExpress for Windows 2015-2016**, 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 2015-2016 database is located, not where you want the software's program files installed.

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 EDExpress database (**expres16.mdb**) before upgrading to a new release.

2. Do *not* use the **Network Server** installation option for a subsequent LAN installation of EDExpress 2015-2016. The **Network Server** installation option is only for users installing EDExpress 2015-2016 to a LAN for the first time. Choosing this installation option installs an empty EDExpress 2015-2016 database file (**expres16.mdb**) 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 2015-2016 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 2015-2016 database (**expres16.mdb**), 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 EDExpress 2015-2016.

If this is a first-time upgrade to a subsequent release of the EDExpress 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 EDExpress 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 EDExpress.

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

To Install Future Releases

For all future releases of EDExpress 2015-2016, 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 EDExpress 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 EDExpress release for more information on the installation process that should be performed.

LAN Server Compatibility

EDExpress 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: EDExpress makes extensive use of Microsoft Access as a database engine, so you should not run the software on peer-to-peer networks such as the following brands:

- DEC Pathworks
- IBM LAN Server
- Sun PC-NFS

LAN Cautions

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

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.

Getting Help

Basics

To get help with the installation of EDExpress:

- Review installation instructions.

- Become familiar with your PC.

- Contact your system administrator.

- Use EDExpress Help.

- Contact Technical Support.

Review Installation Instructions

If you have problems installing EDExpress, 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 EDExpress 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 EDExpress software to a drive for which you do not have access.

Use EDExpress Help

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

- From the **Help** menu, choose a Help command.

- 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.

CPS/SAIG Technical Support

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

- Software functionality

- ISIR and custom file layouts

- EDconnect functionality

Call CPS/SAIG Technical Support at:

800/330-5947

TDD/TTY: 800/511-5806

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

CPSSAIG@ed.gov

See the topic "CPS/SAIG Technical Support" in the EDExpress 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 EDExpress 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 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 IFAP Web site at ifap.ed.gov.