

Session 23



EDExpress Pell: Becoming an Advanced User

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Goal

Providing instruction in using the higher-level processing features of the EDExpress Pell module.

Agenda

- ❑ Formatting and sorting grids
- ❑ Exporting grids to create customized reports that can be opened in other software applications
- ❑ Using file formats to export data to an external source

Agenda--Continued

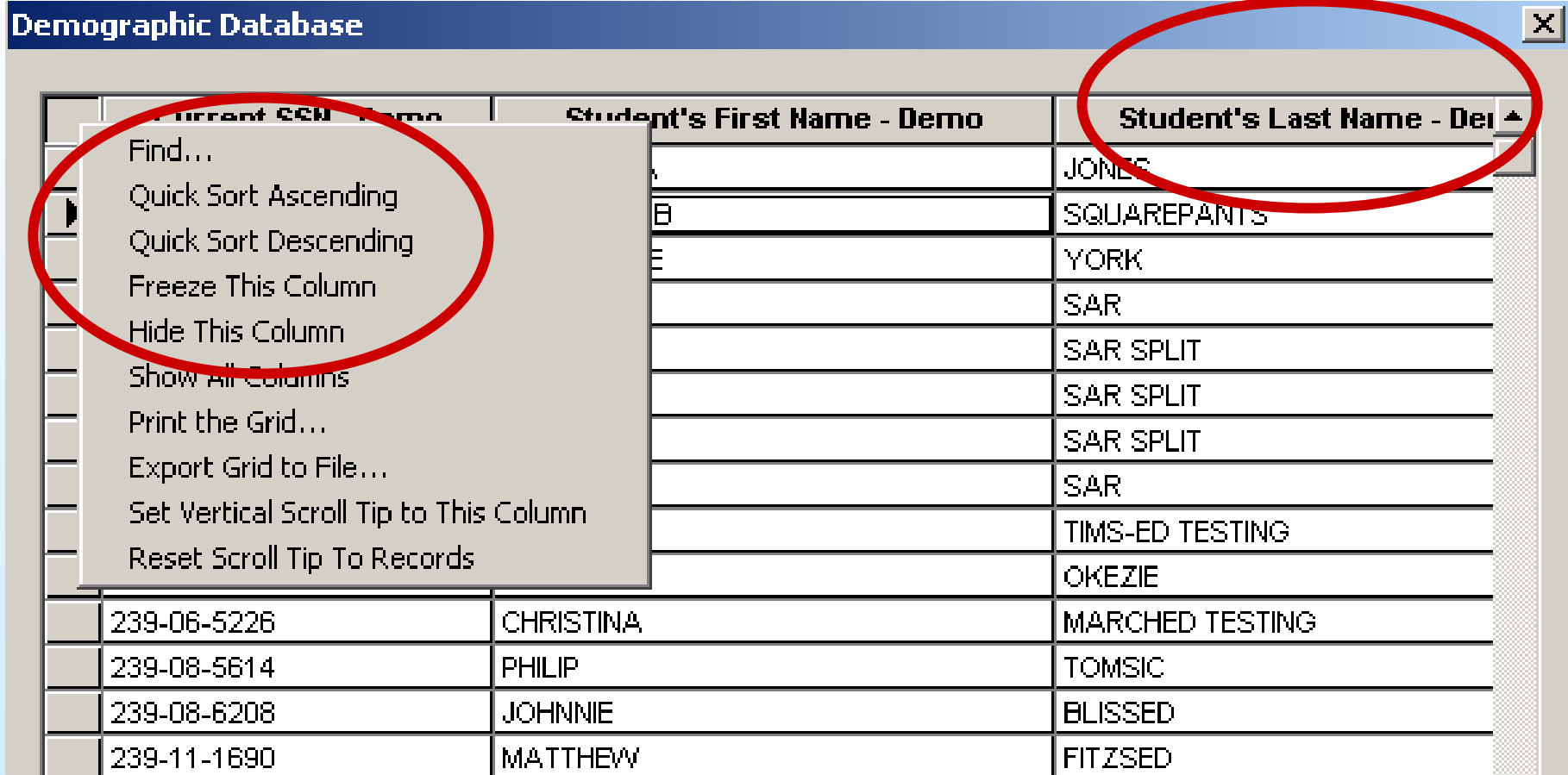
- ❑ Using multiple entry for updating origination records and batch level process/calculate
- ❑ Using disbursement profiles—Practical application
- ❑ Importing the YTD file, printing the reports, and using the rebuild functions

Formatting and Sorting Grids

- By “right clicking” on any grid column within EDEExpress you can:
 - Use the “Find” feature
 - Do a quick sort in ascending or descending order
 - Freeze columns
 - Hide columns

Formatting and Sorting Grids

Demographic Database



| Current SSN - Demo | Student's First Name - Demo | Student's Last Name - Demo |
|--------------------|-----------------------------|----------------------------|
| | | JONES |
| | B | SQUAREPANTS |
| | E | YORK |
| | | SAR |
| | | SAR SPLIT |
| | | SAR SPLIT |
| | | SAR SPLIT |
| | | SAR |
| | | TIMS-ED TESTING |
| | | OKEZIE |
| 239-06-5226 | CHRISTINA | MARCHED TESTING |
| 239-08-5614 | PHILIP | TOMSIC |
| 239-08-6208 | JOHNNIE | BLISSED |
| 239-11-1690 | MATTHEW | FITZSED |

Exporting Grids to create Customized Reports

- ❑ Under Tools/Browse/Pell you can select one of four grids to export field data
 - Origination
 - Disbursement
 - Document Activity
 - Query Fields
- ❑ You can select the field columns within the grids that you want to export

Exporting Grids to Create Customized Reports

Browse Pell

Origination | Disbursements | Document Activity | Query Fields

| | Origination ID | Original SSN - Pell | Student's Name ID | |
|---|-------------------------|---------------------|-------------------|------|
| ▶ | 112112112SA200503010700 | 112-11-2112 | | |
| | 236010003SA200503010700 | 236-01-0003 | | |
| | 236010032SA200503010700 | 236-01-0032 | | |
| | 239049020OK200503010700 | 239-04-9020 | | |
| | 239085614TO200501692400 | 239-08-5614 | | |
| | 239086208BL200501692400 | 239-08-6208 | | |
| | 239111690FI200501692400 | 239-11-1690 | | |
| | 239174374AL200501692400 | 239-17-4374 | | |
| | 239176276CI200501692400 | 239-17-6276 | | |
| | 239322262SA200500793800 | 239-32-2262 | | |
| | 239440540PU200503010900 | 239-44-0540 | PU | 2004 |
| | 239440725PO200503010900 | 239-44-0725 | PO | 2004 |

Record 1

- Find...
- Quick Sort Ascending
- Quick Sort Descending
- Freeze This Column
- Hide This Column
- Show All Columns
- Print the Grid...
- Export Grid to File...**
- Set Vertical Scroll Tip to This Column
- Reset Scroll Tip To Records

Using File Formats to Export Data to an External Source

- The File Formats feature allows you to:
 - set up your own user-defined criteria,
 - export the data in a flat file, then
 - import it to another external source, such as another mainframe system

Using File Formats to Export Data to an External Source

File Formats [X]

App Express | Packaging | Direct Loan | **Pell**

Format Code:

Format Description:

| | Select | Field Description | Table/System |
|---|-------------------------------------|--------------------------|--------------|
| 1 | <input checked="" type="checkbox"/> | FIRST NAME - DEMO | A |
| 2 | <input checked="" type="checkbox"/> | DEPENDENCY STATUS - DEMO | A |
| 3 | <input checked="" type="checkbox"/> | LAST NAME - DEMO | A |
| 4 | <input checked="" type="checkbox"/> | EFC - PELL | T |
| 5 | <input checked="" type="checkbox"/> | ORIGINATION ID | T |
| 6 | <input type="checkbox"/> | ACTIVE TRANSACTION | A |

Deselect | Select All | Deselect All | **Resequence**

NEW RECORD

Add | Delete | Save | Retrieve...

Using Multiple Entry and Process/Calculate...

- ❑ Use Multiple Entry after an ISIR import to prepare Pell records for origination
 - Select the field you want to update on the records and supply the individual values
- ❑ Use Process/Calculate Award Amount for Entire Award Yr... to calculate origination records at the batch level

Using Multiple Entry and Process/Calculate...

Pell Multiple Entry - Field/Records Selection

Default

| # | Select | Field | Value | Change to Blank |
|----|-------------------------------------|---------------------------------|-------|--------------------------|
| 3 | <input type="checkbox"/> | Disbursement Profile Code | | <input type="checkbox"/> |
| 4 | <input type="checkbox"/> | Enrollment Status | | <input type="checkbox"/> |
| 5 | <input type="checkbox"/> | Verification Status Code | | <input type="checkbox"/> |
| 6 | <input type="checkbox"/> | Award Amount | | <input type="checkbox"/> |
| 7 | <input type="checkbox"/> | Origination Cross Reference | | <input type="checkbox"/> |
| 8 | <input checked="" type="checkbox"/> | Weeks Used to Calculate Payment | 28 | <input type="checkbox"/> |
| 9 | <input type="checkbox"/> | Weeks of Instructional Time | | <input type="checkbox"/> |
| 10 | <input checked="" type="checkbox"/> | Credit/Clock Hours to Complete | 850 | <input type="checkbox"/> |
| 11 | <input type="checkbox"/> | Credit/Clock Hours in Program | | <input type="checkbox"/> |
| 12 | <input type="checkbox"/> | Set Origination Ready to Export | | <input type="checkbox"/> |

Using Multiple Entry and Process/Calculate...

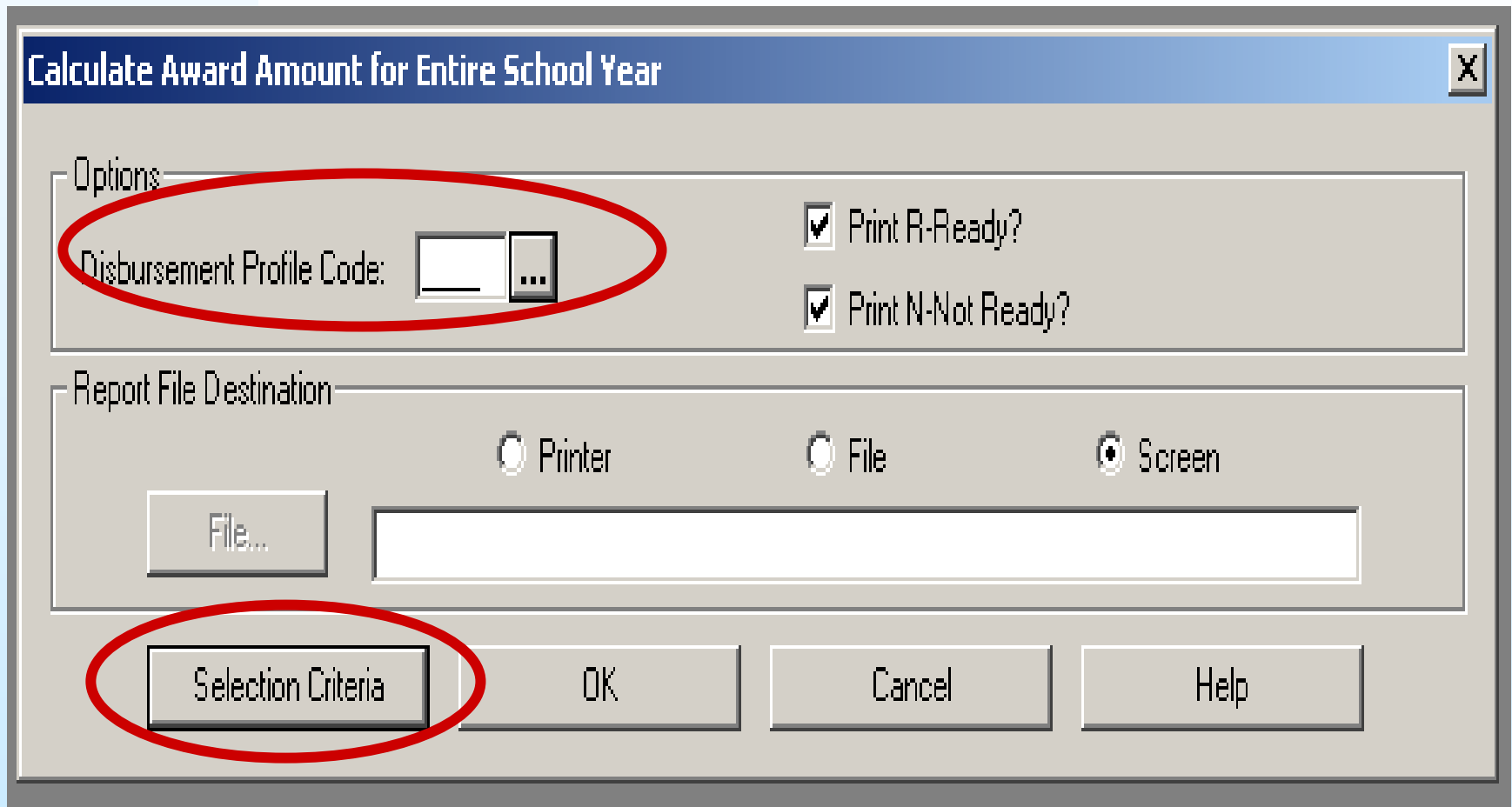


Pell Multiple Entry

| | Last Name | First Name | Middle Initial | Origination ID | Weeks of Instructional Time |
|---|-----------|------------|----------------|-------------------------|-----------------------------|
| 1 | OKEZIE | INGA | | 239049020OK200503010700 | 28 |
| 2 | SAR | TARA | A | 236010032SA200503010700 | 28 |
| 3 | SAR | TINA | A | 236010003SA200503010700 | 28 |



Using Multiple Entry and Process/Calculate...



Calculate Award Amount for Entire School Year

Options

Disbursement Profile Code:

Print R-Ready?
 Print N-Not Ready?

Report File Destination

Printer File Screen

Using Disbursement Profiles— Practical Application

- ❑ You can create as many disbursement profiles as you need when you need them
- ❑ Disbursement profiles automatically create anticipated disbursements
 - Can be added via manual or multiple entry
 - Simplifies creating actual disbursements

Using Disbursement Profiles— Practical Application

- Using disbursement profiles to create anticipated disbursements allows you to take greater advantage of EDExpress disbursement reports such as:
 - Disbursement List
 - List—Disbursement Activity Summary

Using Disbursement Profiles and Disbursement Reports

Report Date: 09/20/2004
 Report Time: 15:47:12

U.S. DEPARTMENT OF EDUCATION
 2004-2005 FEDERAL FELL GRANT PROGRAM
 Fell Disbursement List

PAGE: 1

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

Reporting Fell ID: 007988 Name: HOMERON SCHOOL OF TECHNOLOGY
 Attended Fell ID: 007988 Name: HOMERON SCHOOL OF TECHNOLOGY

| STUDENT NAME (ORIGINATION FELL ID) | DISB # CPS TRANS # | SEQ DISB # DATE | SUBMITTED AMOUNT | ACCEPTED AMOUNT | DISB STATUS | OF |
|---|-----------------------|--------------------|---------------------|--------------------|----------------|----|
| SMYRD, ABEL 289622262SA200500793800 | 01 01 | 01 07/31/2004 | \$1,312.68 | \$0.00 | B | F |
| SMYRD, ABEL 289622262SA200500793800 | 02 01 | 01 11/30/2004 | \$1,312.68 | \$0.00 | B | F |
| SMYRD, ABEL 289622262SA200500793800 | 03 01 | 01 02/28/2005 | \$1,312.68 | \$0.00 | B | F |
| MISS, MATT M. 999663333MI 200500793800 | 01 01 | 01 09/01/2004 | \$1,900.00 | \$0.00 | B | F |
| MISS, MATT M. 999663333MI 200500793800 | 02 01 | 01 01/15/2005 | \$1,900.00 | \$0.00 | B | F |

Total Records: 5
 Total Submitted Amount: \$7,738.00
 Total Accepted Amount: \$0.00

Using Disbursement Profiles and Disbursement Reports

Report Date: 09/21/2004 U.S. DEPARTMENT OF EDUCATION PAGE: 1
 Report Time: 07:57:33 2004-2005 FEDERAL FELL GRANT PROGRAM
 List - Disbursement Activity Summary

Sort: Origination ID

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
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Reporting Fell ID: 018924 School Name BIG BUCKS UNIVERSITY  
 Attended Fell ID: 018924 School Name BIG BUCKS UNIVERSITY

| STUDENT'S NAME<br>ORIGINATION ID           | AWARD<br>AMOUNT | ACTUAL<br>DISB. | ANTICIPATED<br>DISB. | REMAINING<br>DISB. |
|--------------------------------------------|-----------------|-----------------|----------------------|--------------------|
| YORK, CHARLOTTE<br>222334444YC200501892400 | \$3800.00       | \$1925.00       | \$0.00               | \$1875.00          |
| GIBBS, SANDY<br>555667778GH200501892400    | \$4050.00       | \$1350.00       | \$2700.00            | \$0.00             |
| WARD, SQUID<br>555667778IA200501892400     | \$2800.00       | \$934.00        | \$1866.00            | \$0.00             |
| FATTY, CRAEBY<br>555667778OPA200501892400  | \$3400.00       | \$1134.00       | \$2266.00            | \$0.00             |
| TIN, FLANK<br>555667778ITC200501892400     | \$3100.00       | \$1034.00       | \$2066.00            | \$0.00             |

# YTD File—Importing, Printing and Rebuilding

- You can request a YTD file containing information about your school's activity that has been posted to COD up to the current date
  - Export a Data Request in EDExpress
  - Contact COD customer service
  - Request from the COD Web site
  - Import file name is PGYR\*\*OP

# YTD File—Importing, Printing and Rebuilding

- You can use the YTD file to:
  - Prints comparison reports to identify differences between COD data and EDExpress
  - Update selected records or all records with the data contained in the YTD file

# YTD File—Importing, Printing and Rebuilding

The screenshot shows the 'Import' application window with the following elements:

- Navigation Bar:** Includes icons and labels for 'Global', 'App Express', 'Packaging', 'Direct Loan', and 'PELL'.
- Import Type:** A dropdown menu set to 'YTD Data (PGYR)'.
- Import From:** A section containing a 'File...' button and a text field with the path 'C:\NAM\DATA\PGYR050P.\*'.
- Report To:** A section with radio buttons for 'Printer', 'File', and 'Screen' (which is selected). Below the radio buttons is another 'File...' button and an empty text field.
- Options:** Two checkboxes at the bottom left: 'Compare And Print Exception?' and 'Print All?'. Both are currently unchecked.
- Update:** A dropdown menu at the bottom right with 'Selected' and 'Rebuild All' as visible options.

Red circles highlight the 'File...' button and the 'Compare And Print Exception?' checkbox in the 'Report To' section, and the 'Update:' dropdown menu.

# Technical Assistance

We appreciate your feedback and comments.

## **CPS/SAIG Technical Support:**

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