



Session 8

The Power and Flexibility of EDExpress



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Introduction

- Who this session is geared for?
- Evaluations
- Questions



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Agenda

- Using setup options to make EDEExpress more flexible
- Power using EDEExpress
 - Tools available to do more



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Global Setup

- Security
- System
- File Management
- User Database
- Document Tracking
- User Defined Text



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Security Setup

- Security
 - Security Groups
 - Security Users



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Security Groups

Security Groups

Group:

Browse Only (Tabs)? Password Timeout

Global App Express Packaging

#	Group	Function	Access
40		User Database	<input checked="" type="checkbox"/>
41		User Defined Text	<input checked="" type="checkbox"/>
42	TOOLS MENU		<input checked="" type="checkbox"/>
43		All Utilities	<input checked="" type="checkbox"/>
44		Browse	<input checked="" type="checkbox"/>
45		File Format	<input checked="" type="checkbox"/>
46		Query	<input checked="" type="checkbox"/>
47		Setup	<input checked="" type="checkbox"/>
48	UTILITIES		<input checked="" type="checkbox"/>
49		Clear Files	<input checked="" type="checkbox"/>
50		Clear Logged In Flag	<input checked="" type="checkbox"/>
51		Clear Record Locks	<input checked="" type="checkbox"/>
52		Compact Database	<input checked="" type="checkbox"/>
53		Repair Database	<input checked="" type="checkbox"/>
54		Verify Database	<input checked="" type="checkbox"/>
55			<input type="checkbox"/>

1 of 1





Security Users

User Security [X]

User ID:

Group Name:

Logged in? Export to EDConnect?

Password:

Password Date:

1 of 2





Global System

■ System

- Notepad entry
- Default system to display
- Document tracking printing
- Return to Function
- Printing single or multiple records



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Global System Setup

Global System Setup [X]

Allow notepad entries to be edited?

Default System to Display? App Express

Number of days to reprint Document Tracking letters? 00

of Times to Reprint Doc. Tracking Letters? 00

of Copies of Doc. Tracking Letters? 00

Return to Function flag:

Single/Multiple (Default Print): Single

OK Cancel Help





Electronic Access Conference
2000 GET CONNECTED

New Setup Feature

Prior Year Data [X]

EDEExpress can import prior year setup data. Do you wish to do this now?

Don't show me this again.



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File Management

File Management [X]

Exports Imports

N:\FINAID\IAM\DATA\ **Default Export Directory**

Description	File Path	File Name
Corrections	N:\FINAID\IAM\DATA\	CORR00IN.DAT
Origination External	N:\FINAID\IAM\DATA\	DEER00IN.DAT
Origination LOC Full PLUS	N:\FINAID\IAM\DATA\	DEPF00IN.DAT
Manifest Stafford/Manifest PLUS	N:\FINAID\IAM\DATA\	DEPM00IN.DAT
Allocation/Reallocation Statement	N:\FINAID\IAM\DATA\	DERS00IN.DAT
Origination LOC Change	N:\FINAID\IAM\DATA\	DESC00IN.DAT
Origination LOC Disbursement	N:\FINAID\IAM\DATA\	DESD00IN.DAT
Origination LOC Full Stafford	N:\FINAID\IAM\DATA\	DESF00IN.DAT

OK Cancel Help



Application Processing Setup

- Default Housing Code
- Default Cost of Attendance
- Assumed School
- Update Demographic Data
- Compare Demographic Data
- Default Transaction Displayed





App Express System Setup

App Express System Setup [X]

Default Housing Code:

Default Cost of Attendance:

Assumed School: ...

Update Demographic Data?

Compare Demographic Data?

Default Transaction Displayed: ▾





Electronic Access Conference
2000 GET CONNECTED

Available Tools

- Multiple Entry
- ISIR Review Tab
- File Format
- Browsing
- User Database
- Queries/selection criteria
- Grids



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Multiple Entry

Global Multiple Entry - Field/Records Selection

Default

#	Select	Field	Value
1	<input type="checkbox"/>	Pell Verification Status	
2	<input type="checkbox"/>	Loan Entrance Interview Completed?	<input type="checkbox"/>
3	<input type="checkbox"/>	Transaction Paid On	
4	<input type="checkbox"/>	Document Code	
5	<input type="checkbox"/>	Document Status	
6	<input type="checkbox"/>	Document Received Date	
7	<input type="checkbox"/>	User Field	
8	<input type="checkbox"/>	User Value	
9	<input type="checkbox"/>	Institution Use	

SSN File

File...

Report Destination

Printer File Screen

File...

Sort By:

OK Cancel Help Selection Criteria



ISIR Review Tab

- Allows you to compare two ISIR transactions
- Flags any differences
- Determine which ISIR contains the most accurate information
- Allows you to select the Active Transaction



Active Transactions

- EDEExpress considers the Active Transaction to be the “correct transaction” and uses that transaction when the record is imported into Packaging, Direct Loan or Pell modules
- Selecting Process|Activate Transaction from the menu bar on the record sets the Active Transaction





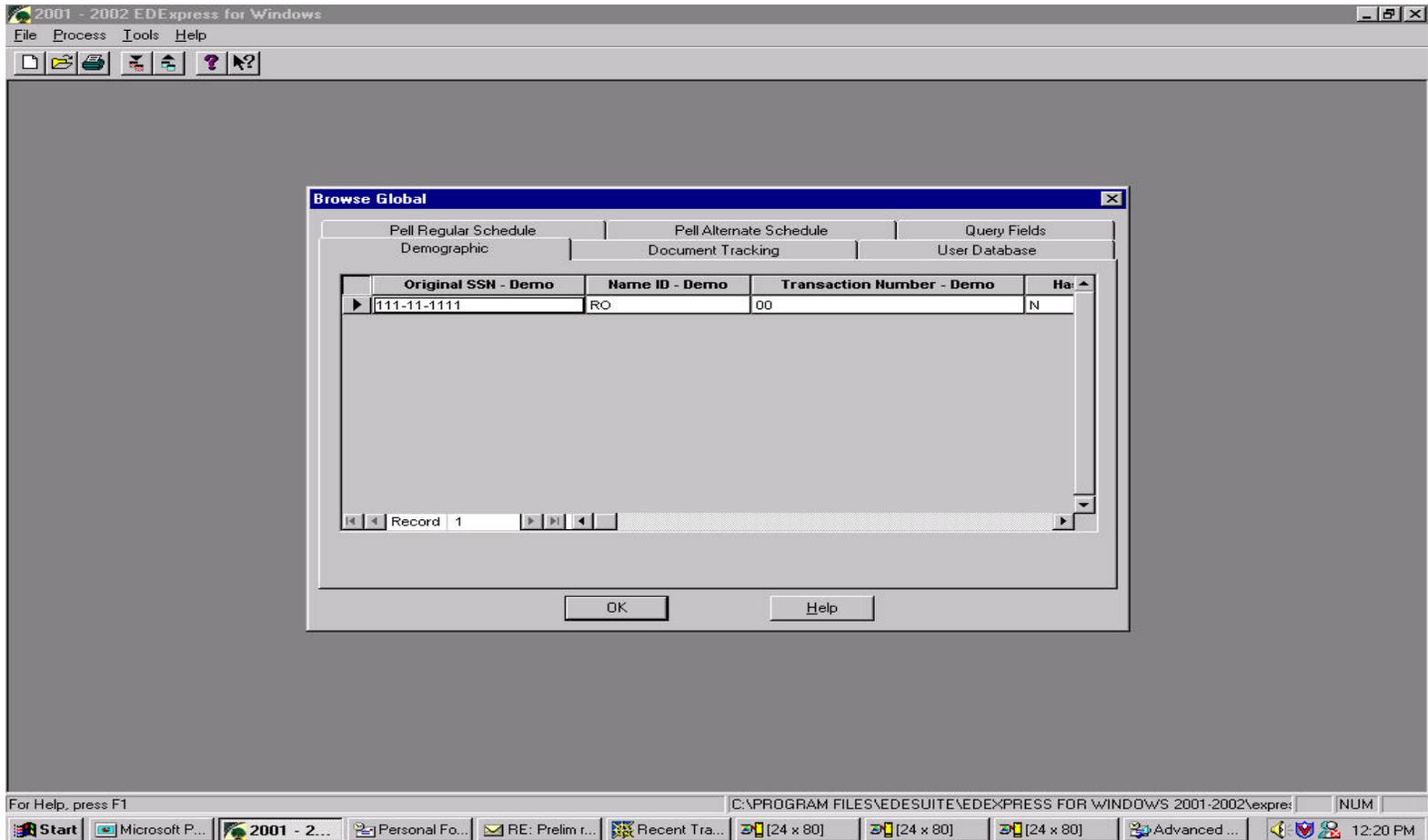
Browsing

- Global
 - Demographic
 - Document tracking
 - User Database
 - Payment schedule
- Apps
 - Batch activity



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Global Browse



2001 - 2002 EDExpress for Windows

File Process Tools Help

Browse Global

Pell Regular Schedule | Pell Alternate Schedule | Query Fields
Demographic | Document Tracking | User Database

Original SSN - Demo	Name ID - Demo	Transaction Number - Demo	Ha
▶ 111-11-1111	RO	00	N

Record 1

OK Help

For Help, press F1 | C:\PROGRAM FILES\NEDESUITE\NEDEXPRESS FOR WINDOWS 2001-2002\expre: | NUM

Start | Microsoft P... | 2001 - 2... | Personal Fo... | RE: Prelim r... | Recent Tra... | [24 x 80] | [24 x 80] | [24 x 80] | Advanced ... | 12:20 PM



File Format

- Used as a means to get data from EDEExpress into other software
- Create the file format by selecting the data you want to export
- Define the order of that data
- Export the file as ASCII text for use in other software





Practical Uses for File Format

- To choose specific data from the database for use in another program, file format is an option
- EFCs for dependent students for the FISAP
- Mailing Labels and Creating Lists
- When a Query is not quite what you want



Setting Up File Format

- Under Tools | Setup | File Format
- Click on the fields you wish to export
- The first field chosen will be the in the first column
- You can re-sequence the fields
- Export the selected data fields as an external ISIR for all records in your database





File Formats

File Formats [X]

App Express | Packaging | Direct Loan

FORMAT CODE

FORMAT DESCRIPTION

	Select	Field Description	Table/Syste	Sequenc
1	<input checked="" type="checkbox"/>	STUDENT VETERAN	E	1
2	<input checked="" type="checkbox"/>	LAST NAME	E	2
3	<input checked="" type="checkbox"/>	FIRST NAME	E	3
4	<input checked="" type="checkbox"/>	STUDENT IS MARRIED	E	4
5	<input type="checkbox"/>	# OF MONTHS VEAP RECEIVED	E	
6	<input type="checkbox"/>	ADD DATE	E	

Select Select All Deselect All Resequence

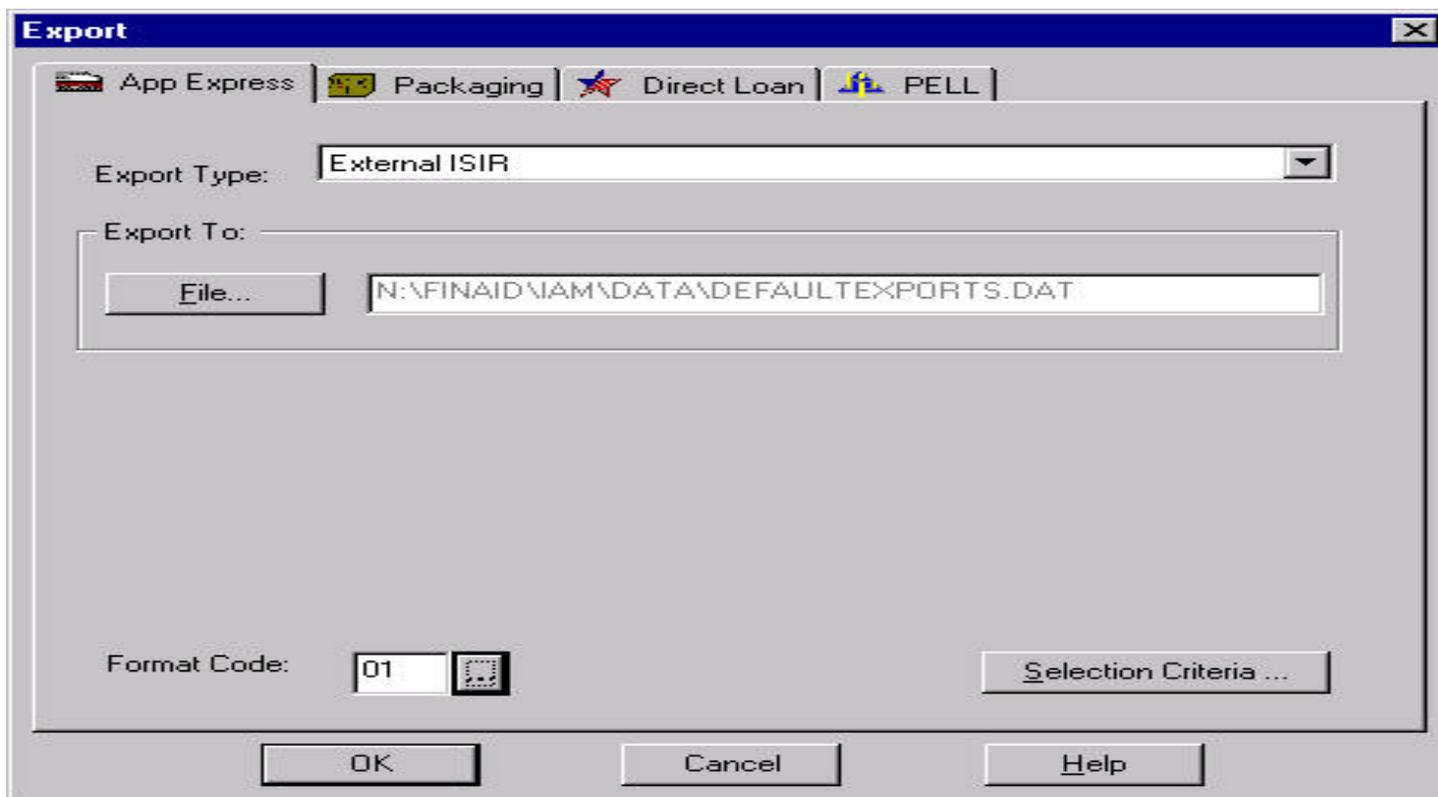
NEW RECORD

Add Delete Save Retrieve...

OK Cancel Help



Exporting Data to Other Programs



Export

App Express | Packaging | Direct Loan | PELL

Export Type: External ISIR

Export To: N:\FINAID\IAM\DATA\DEFAULTEXPORTS.DAT

Format Code: 01

Selection Criteria ...

OK Cancel Help



User Database

- Allows you to add any data you wish to track to the EDEExpress database
- Create up to 255 fields for data specific to your institution
- Information is stored but is not exported to CPS
- The User database can be updated through an external import file



Practical Uses For User Data

- Helps you customize EDEExpress to track institutionally specific data
- Scholarships with specific requirements
- Legacy students
- High school GPA
- If you can define it, EDEExpress can query on it





How can User Database Help Me?

- Student of alumni
- Eligible for special admissions consideration and Alumni Scholarship
- User database
 - Create user-defined field of ALUMNI, a Y/N field
 - Mark ALUMNI field as Y on user Data Tab or update fields using the Import User Data File



Setting Up the User Database

- Fields can be:
 - Text, up to 40 characters
 - Numeric, 10 characters, numeric only
 - Date, 8 characters (MMDDCCYY)
 - Yes or No, 1 character Y/N Boolean fields
- Fields appear on the User Data Tab of student record
- Fields appear on Browse User Database





User Database Setup

User Database Setup [X]

	Field	Type	Length	Description
1	ANNIVERSARY	D	8	STUDENTS ANIVERSARY
2	ALUMNI	T	1	PARENTS ARE ALUMNI
3	GPA	L	10	HIGH SCHOOL GPA

Add Delete OK Cancel Help



Updating User Data

- Add the data manually on each record using the User Data Tab
- Import any text file under Global | User Defined Data
- Add user field and user value globally with Process Multiple Entry





Browsing the User Database

Browse Global [X]

Demographic | Document Tracking | **User Database** | Payment Schedule

	Original SSN	EXPECTED FAMILY CONTRIBUTION	PARENTS ARE ALUMNI
	593287640		
	593687604		
	593748471		
	595634984		
	597014732		
	600600746		
	610098683		
	618225123		
	620388213		
	621059232		
▶	627129148		

Record 1517

OK Help



What are Queries?

- Queries are an essential part of working in EDEExpress
- A set of criteria that describes a particular student population
- Allow you to limit (filtering) the number of records you are working with
- Queries available anywhere in EDEExpress that you can use selection criteria



Practical uses for Queries

- Auto Request in Add documents
- Printing by Batch Number
- Importing selected students into Pell Module
- Printing a select group of ISIR's
- Exporting specific records out of EDEExpress for use in other software
- Multiple entry by add date range



Predefined Queries

- Each Module has a set of commonly used predefined queries
- Predefined queries can be used as provided
- Predefined queries can be copied and modified



Creating your own Queries

- Create a query in the Apps module using any field that is on the ISIR
- Create a query in the Global module from fields listed on the Demo record
- Modify a predefined query to fit your needs
- “Nest” query phrases inside each other using parenthetical statements





Customizing a Query

Query

Global App Express Packaging Direct Loan Pell

Title:
PARENT IS AN ALUM

Field: PARENTS ARE ALUMNI Operator: = Value: Prompt at Execution Y

Append Remove Change And Or Value Help

Criteria:
(PARENTS ARE ALUMNI = "Y")

Add Left (Add Right)
Remove Left (Remove Right)

17 of 17
Add Delete Save Retrieve...

OK Cancel Help



What is a Grid?

- Data in EDEExpress is stored in Grids
- A means for viewing a list of records in the database
- Can be accessed anywhere there is an Ellipsis button or selection criteria button
- Use the Grid for quickly finding information



Working with Grids

- **Sorting by columns**
 - in ascending order
 - in descending order
- **Hiding/Freezing columns**
- **Reordering columns**
- **Exporting grid information to a file**
- **Printing grid information**





Sorting by Columns on the Grid

- Right click on the column heading that you want to sort by
- Choose quick sort ascending or quick sort descending



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Hiding/Freezing Columns on the Grid

- Right click on the column that you want to hide and choose hide that column
- Hide as many columns as you choose
- Freeze by right clicking and choosing freeze
- Freeze one column at a time





Exporting Grids to a File

- Export any selected data or all data from a grid to an ASCII file
- Include field names as the first row
- Define the export type
- Use custom delimiters if desired



Printing Information from the Grid

- Right click on the heading
- Hide the unwanted columns
- Order columns by preference
- Sort the information by any column in either ascending or descending order
- Once in the format you want, right click and choose print the grid





Document Tracking: What is it?

- A means to know, at a glance, if you have received all required forms for any student
- A way to send reminders to students if forms are missing
- Tracks required institutional documents
 - Those required for verification
 - Those required for packaging
 - Any other that the school deems important





Document Tracking: How is it Used?

- Tracking documents required for verification (e.g., tax returns)
- Tracking eligibility for special admissions
- Tracking documents for students with specific comment codes
- Tracking important documents in the student file, such as vaccination records, health insurance policies, etc.





Document Tracking Process

- Three steps to process:
 - Create document codes
 - Add document code to student records
 - Update document codes with status



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Creating Documents

- Under Tools |Global |Setup| Document Tracking
 - Define document code and description (code=10 alpha/numeric)
 - Determine document requirement (when adding documents globally through Process|Add Documents)
 - Auto Request (Adds document to all records)
 - Required for Packaging (Does not get added)
 - Required for Verification (Added only to records selected for verification)



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Creating a Document

Document Tracking [X]

Code: PARENTALUM

Year: 2000-2001

Description: Proof that Parent is an Alumni of this school

Criteria: PARENT IS AN ALUMNI ...

Automatic Request?

Required for Packaging?

Required for Verification?

Comments: 1. [] 4. []
2. [] 5. []
3. [] 6. []

2 of 3

Add Delete Save Retrieve...

OK Cancel Help



“Required for...” Flags

- If Required for Packaging is checked, record cannot be Packaged until document is marked as received
- If Required for Verification is checked, the software checks the Pell Verification Status flag on the Demo tab. If it's anything other than N, the record is assigned to the document



Adding Documents

- Globally: by going to Process|Add Documents. Documents added to records based on which requirements were selected
- Manually: by going to individual records and selecting the desired document codes for each record
- Multiple Entry: by going to Process menu



Updating Documents

- Multiple Entry
 - Document tracking is a global function
 - If filtering criteria is used, process adds document to any records that meet the listed criteria
 - If no criteria is listed, every student record's document will get updated
- Manually by going to each record's Docs Tab



Docs Tab

- Document Status
 - N, Not Received
 - R, Received
 - W, Waived
 - I, Incomplete
 - D, Received, not reviewed
- Receive Date
- Document Add Date listed here





How Can Document Tracking work for me?

- Create a document
 - Proof of Parental Attendance
- Process | Add Documents
 - By attaching “Parent is an Alum” query, all students with ALUMNI = Y will receive the document
- Update document status
- Print doc tracking letters as necessary



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Customizing Document Tracking Letter

- Predefined Document Tracking letter prints:
 - Institution name and address
 - Student ID , name and address
 - 1 block of user defined text
 - 1 block of predefined text
 - List of missing documents
 - Closing



Customizing Award Letters

- Predefined Award letter prints:
 - Offer letter text
 - Notification letter text
 - Missing documents letter text
- Prints automatically:
 - Acceptance date (offer only)
 - Institution name and address
 - Student ID, name and address
 - Standard award text
 - Closing



Customizing Award Letters

- Customizing options:
 - 40 lines of user defined text
 - List of missing Documents
 - Signature
 - Needs analysis
 - Heading
 - Greeting
 - Choice of student address



Customizing User-Defined Letters

- 5 user defined letters
- Customized under Tools Setup | Global | User Defined Text
- 42 lines of text
- Usable for any institutional needs
- Used with queries to address a particular segment of your student population
- Create a specific title for each letter



Printing Letters

- Printing Document Tracking Letters
 - File | Print | Global | Document Tracking
 - Single or Multiple
 - Select printing & sort options
- Printing User Defined Letters
 - File | Print | Global | User defined letter (user defined title)
 - Single or Multiple
 - Select printing & sort options





Printing Letters

■ Printing Award Letters

- Manually (within student record)
- Globally
 - File | Print | Packaging | Letters-Award
 - Single or Multiple
 - If Offer Letter, enter Acceptance Date
 - Select printing and sort options



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Document Tracking System Setup

- Set defaults for printing Document Tracking letters
 - Tools | Setup | Global | System
 - Number of days to reprint Doc Track Letters
 - Number of times to reprint Doc Track Letters
 - Number of copies of Doc Track Letters



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Further Assistance

CPS Customer Service

800/330-5947

E-mail: cps@ncs.com

SFA TECH:

<http://www.ed.gov/sfatech/listserv.html>

TDD/TTY: 800/511-5806



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Questions?



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