



**Electronic Access Conference**  
*emagine*  
2001

**Student Financial Assistance**

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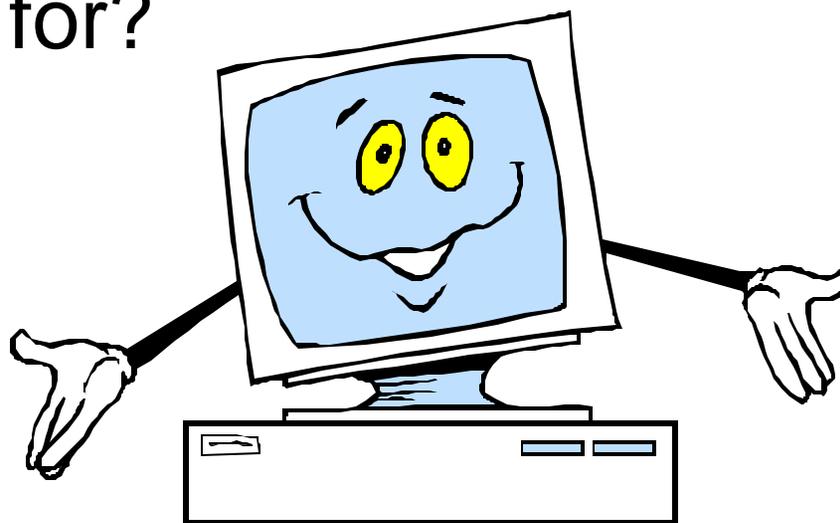
THE U.S. Department of  
**EDUCATION**



## ***Session 60***

# ***EDExpress: Getting the Most Out of It***

- Who is this session for?
  - All levels
- Hands-on format
- Evaluations
- Questions
  - Time for Q & A at end of session





# *I didn't know EDEExpress could do that...*

- Document Tracking
- User Letters
- User Database
- File Formats
- Queries



# *Document tracking*



- To satisfy documentation requirements and meet school information needs, applicants must provide documents to the financial aid administrator to complete the application process.
  - Tax forms
  - School aid application
  - Any document you require

# *Document tracking*

- Allows you to setup required documents
- Assign documents to students
- Print letters to mail to students
- Track status of letters



# Document tracking

## ■ Setup

- Define internal code
- Description of document (as it will print on the tracking letter)
- Establish criteria to use in assigning to student records

Document Tracking

Global Packaging

Code: 01 TAX\_\_\_

Description: Completed and signed 2001 federal tax return

Criteria: ...

Automatic Request?

Required to Package?

Required for Verification?

#	Reject Reason
1	
2	
3	
4	

#	Comment Cod
1	
2	
3	
4	

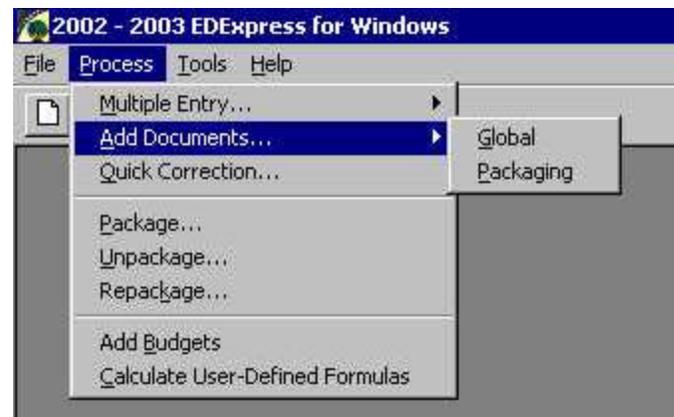
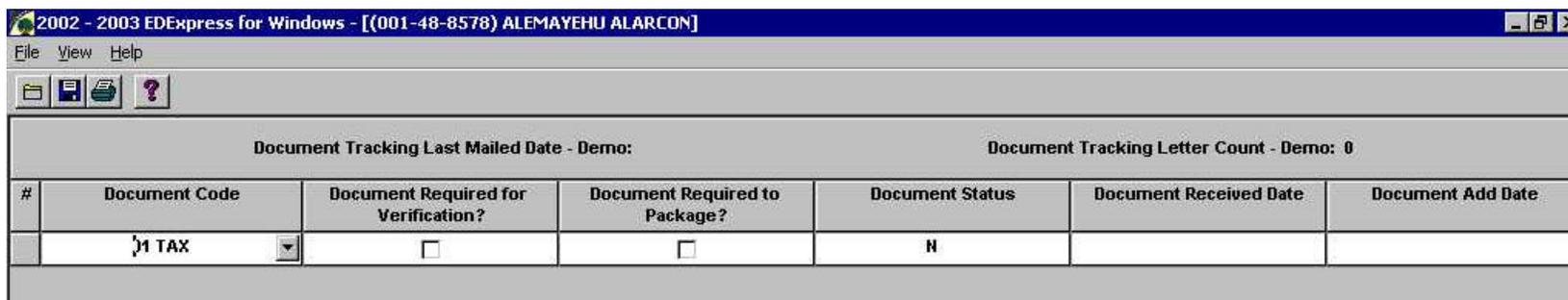
1 of 1

Add Delete Save Retrieve...

OK Cancel Help

# Document tracking

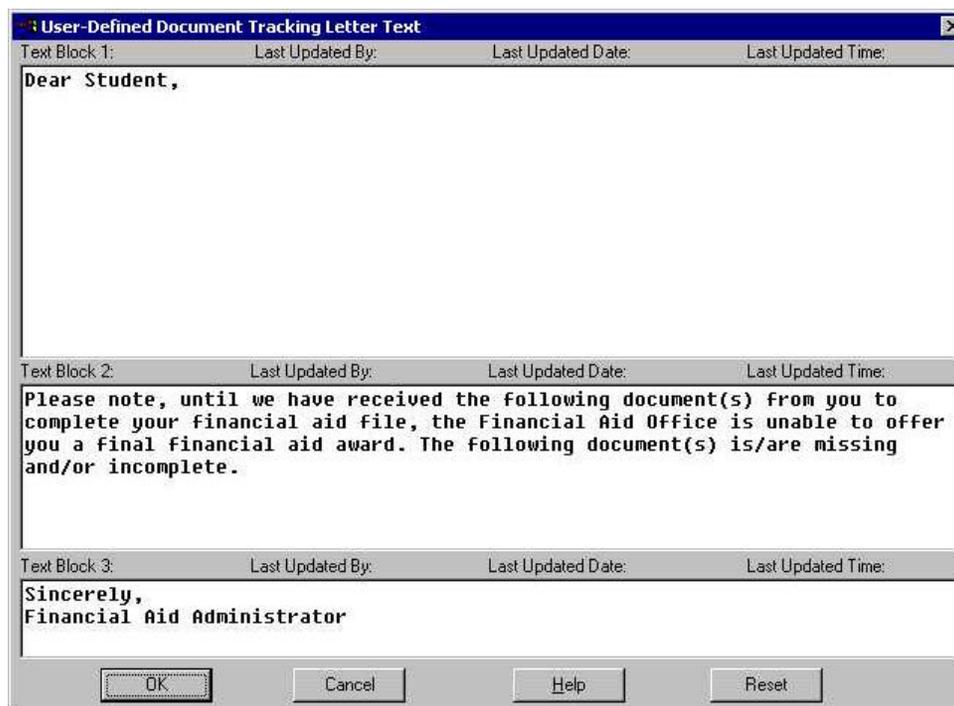
- Attach the documents to the student records
  - Process|Add Docs
  - Manually

Document Tracking Last Mailed Date - Demo:			Document Tracking Letter Count - Demo: 0			
#	Document Code	Document Required for Verification?	Document Required to Package?	Document Status	Document Received Date	Document Add Date
	1 TAX	<input type="checkbox"/>	<input type="checkbox"/>	N		

# Document tracking

- Print tracking letters
  - per student
  - in batches
- You can customize the text of the letter



The screenshot shows a dialog box titled "User-Defined Document Tracking Letter Text" with a close button (X) in the top right corner. The dialog is divided into three sections, each with a header row containing "Text Block 1:", "Last Updated By:", "Last Updated Date:", and "Last Updated Time:".

**Text Block 1:** Contains the text "Dear Student,".

**Text Block 2:** Contains the text "Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete."

**Text Block 3:** Contains the text "Sincerely, Financial Aid Administrator".

At the bottom of the dialog are four buttons: "OK", "Cancel", "Help", and "Reset".

# Document tracking

- Track document status and record updates
  - Individual students

## Status codes

- N Needed
- R Received
- W Waived
- D Received Not Reviewed

2002 - 2003 EExpress for Windows - [(001-48-8578) ALEMAYEHU ALARCON]

File View Help

Document Tracking Last Mailed Date - Demo:      Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required to Package?	Document Status	Document Received Date	Document Add Date
1	01 TAX	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N		10/12/2001
2	PARENTW2	<input type="checkbox"/>	<input type="checkbox"/>	N		10/12/2001
3	SS CARD	<input type="checkbox"/>	<input type="checkbox"/>			10/12/2001
		<input type="checkbox"/>	<input type="checkbox"/>	N R W D		

# Document tracking

- Track document status and record updates
  - Individual students
  - Multiple Entry



Global Multiple Entry

	Last Name	First Name	Middle Initial	SSN	Document Code	Document	Document Received Date
1	ALARCON	ALEMAYEHJI		001-48-6578	PARENTW2		
2	MONTGOMERY	IVAN	O	002-38-1474	PARENTW2		
3	PEARSON	IRIS	A	002-68-4685	PARENTW2		
4	ROGLES	JON	S	002-20-1810	PARENTW2		

Save Cancel Help



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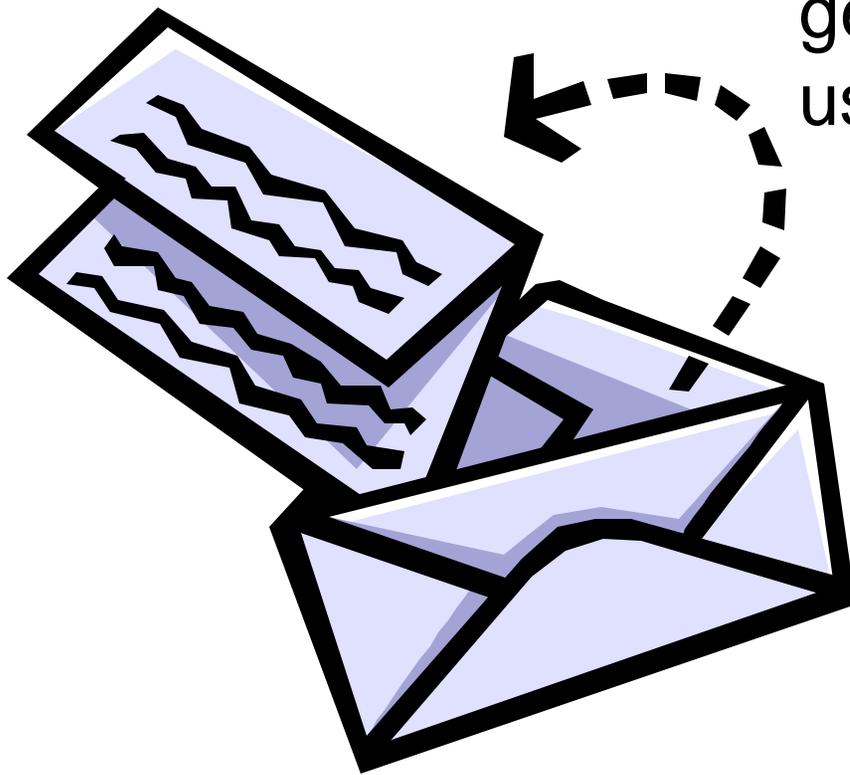
# *Document tracking*

Now it's your turn!  
Hands-on Exercise 1



# *User letters*

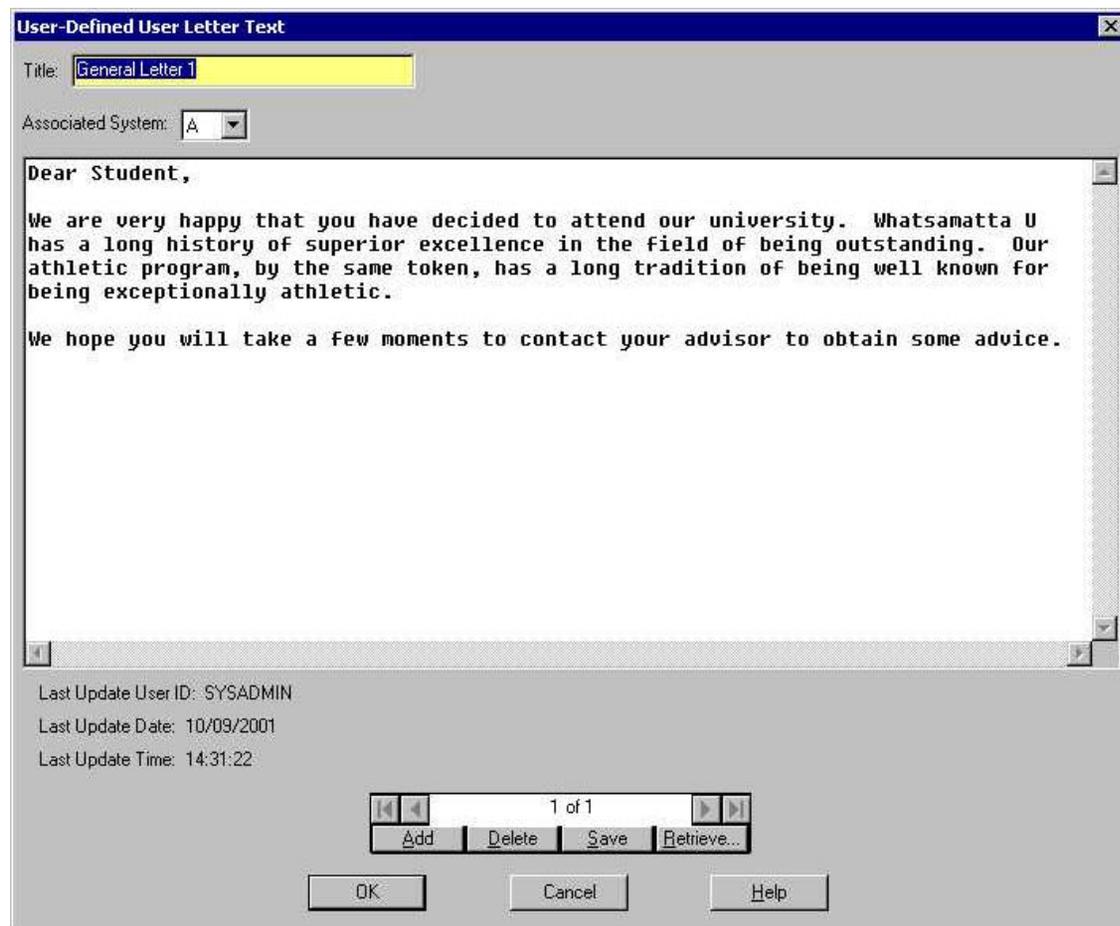
- Use this option to create general-purpose letters. A user letter includes:



- Today's date
- Your school's name and address
- The student's name and address
- The student's ID
- Up to 40 lines of your text
- A title for the letter

# User letters

- Create an unlimited number of letters
- Assign letters to a specific module
- Designed to fit #10 envelope window



The screenshot shows a window titled "User-Defined User Letter Text". It contains a text input field for the title, currently set to "General Letter 1", and a dropdown menu for the associated system, currently set to "A". The main area is a large text box containing the following text:

Dear Student,

We are very happy that you have decided to attend our university. Whatsamatta U has a long history of superior excellence in the field of being outstanding. Our athletic program, by the same token, has a long tradition of being well known for being exceptionally athletic.

We hope you will take a few moments to contact your advisor to obtain some advice.

At the bottom of the window, there is a status bar showing "Last Update User ID: SYSADMIN", "Last Update Date: 10/09/2001", and "Last Update Time: 14:31:22". Below the status bar are navigation buttons: "Add", "Delete", "Save", and "Retrieve...". At the very bottom are "OK", "Cancel", and "Help" buttons.



# User letters

- Print letters
  - from student records
  - in batch mode

General Letter 1

Date 10/09/2001

ALEMAYEHU ALARCON  
319 W ELM ST  
LOS ANGELES, CA 90016

School Code 001349  
WHATSAMATTA UNIVERSITY  
CARTER HALL-ROOM 1005  
FROSTBITE FALLS, MN 55555

Student ID 001488578 AL 01

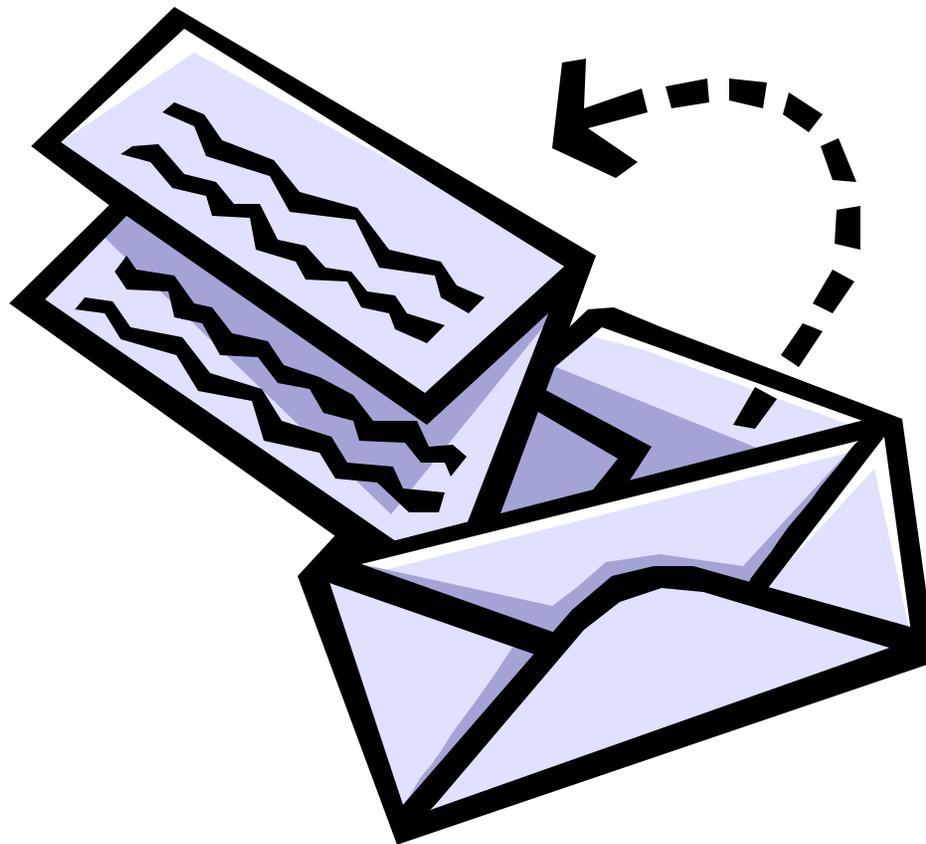
Dear Student,

We are very happy that you have decided to attend our university. Whatsamatta U has a long history of superior excellence in the field of being outstanding. Our athletic program, by the same token, has a long tradition of being well known for being exceptionally athletic.

We hope you will take a few moments to contact your advisor to obtain some advice.

# *User letters*

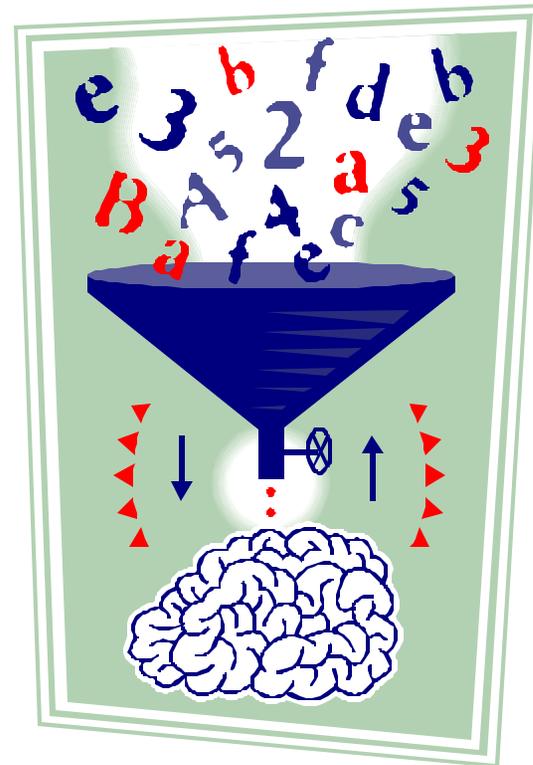
Now it's your turn!  
Hands-on Exercise 2





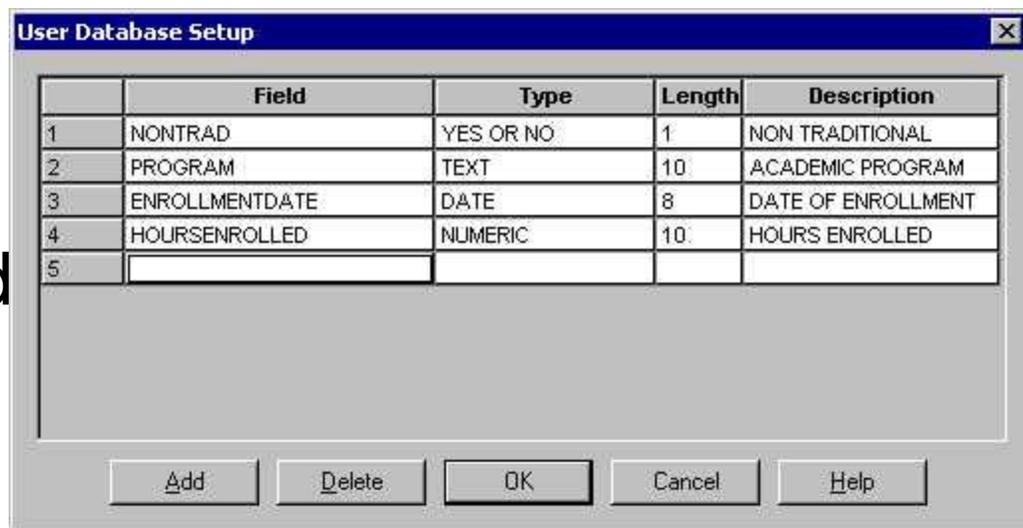
# ***User database***

- Allows you to create up to 255 fields of data
- This data available in all modules
- Data types include date, numeric, text, Boolean (y/n)



# User database

- Setup user database
- Update records
  - Individual record
  - Multiple entry
- Print reports
- Use with queries



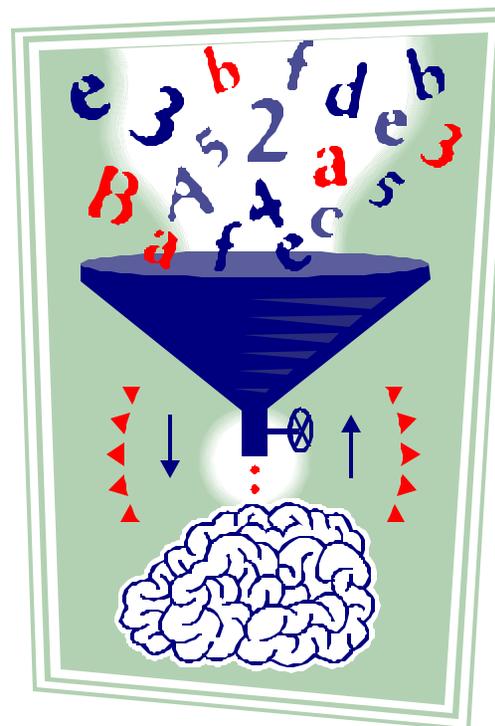
The dialog box titled "User Database Setup" contains a table with the following data:

	Field	Type	Length	Description
1	NONTRAD	YES OR NO	1	NON TRADITIONAL
2	PROGRAM	TEXT	10	ACADEMIC PROGRAM
3	ENROLLMENTDATE	DATE	8	DATE OF ENROLLMENT
4	HOURSENROLLED	NUMERIC	10	HOURS ENROLLED
5				

At the bottom of the dialog box are five buttons: Add, Delete, OK, Cancel, and Help.

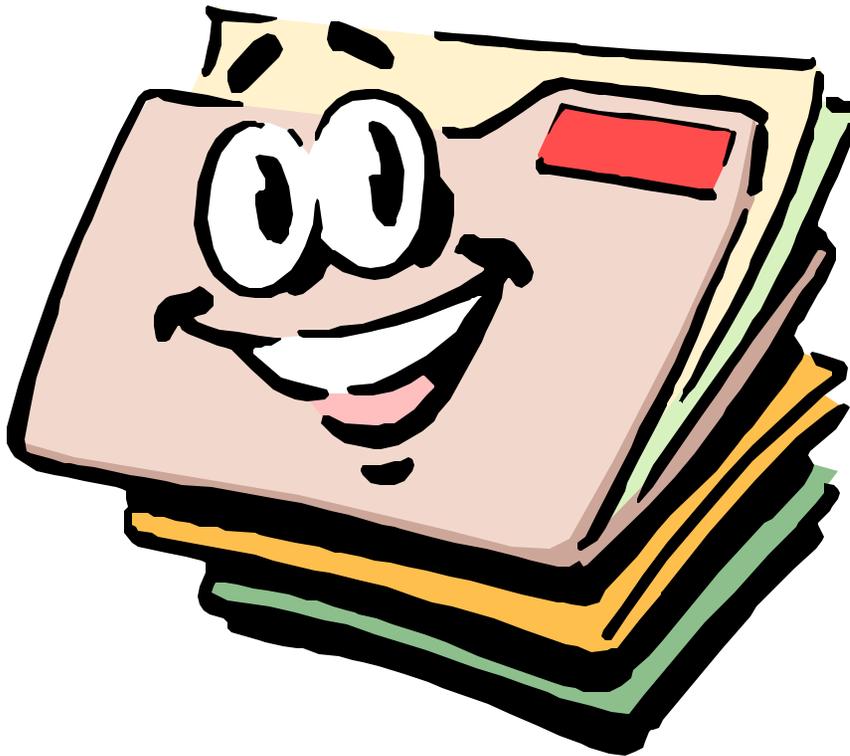
# *User database*

Now it's your turn!  
Hands-on Exercise 3





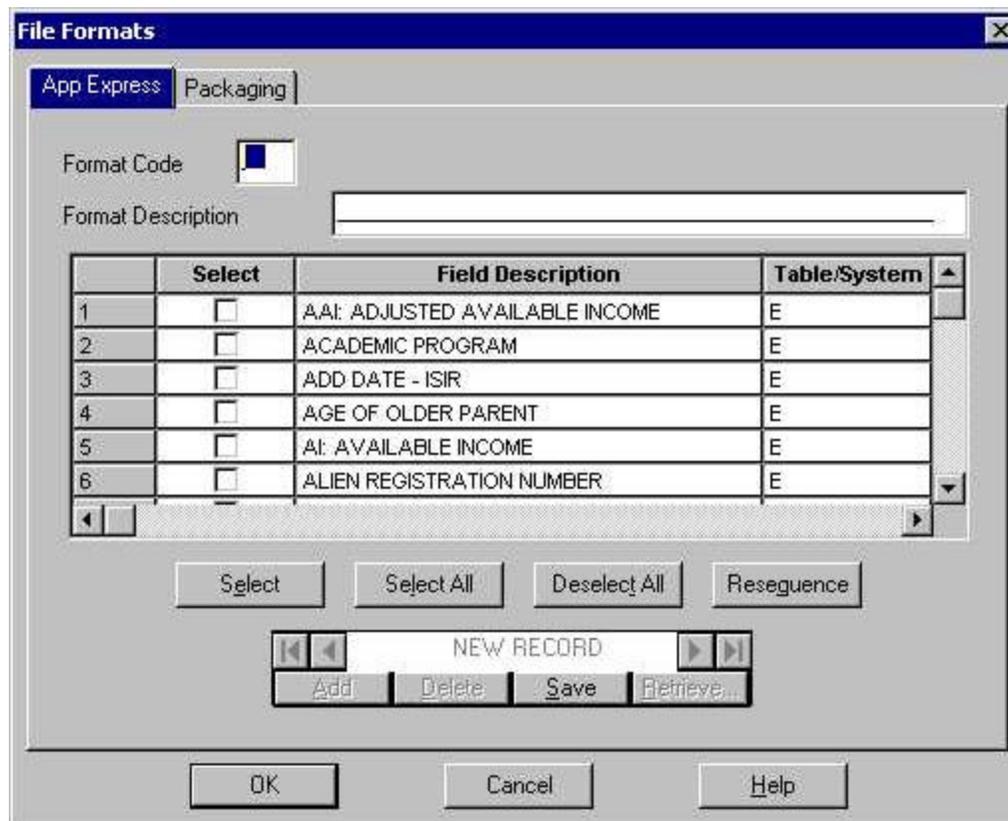
# *File formats*



- Allows you to set up user-defined file formats
  - export to external systems
  - creating text exports with specific information

# File formats

- Setup format
- Export external ISIR



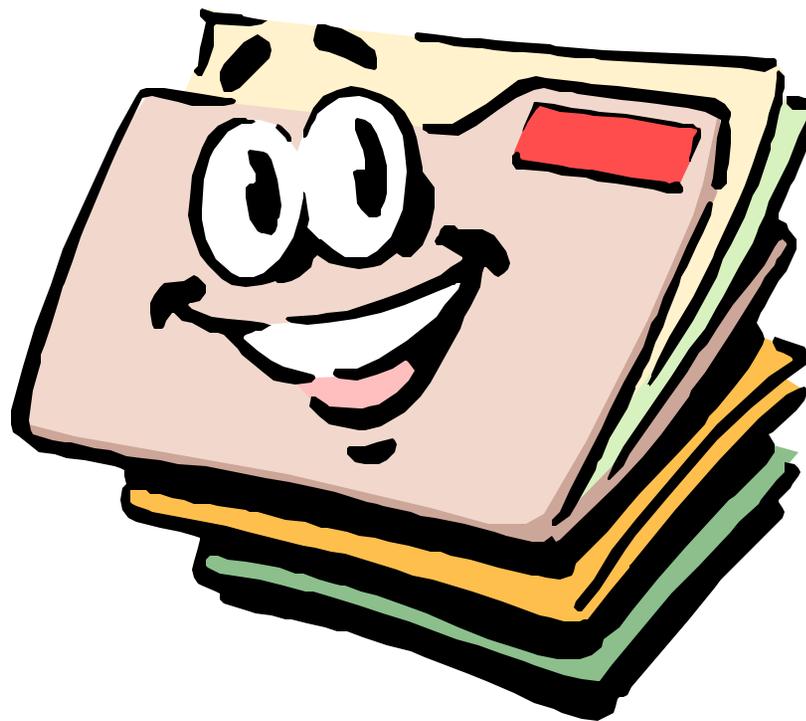
The screenshot shows a 'File Formats' dialog box with the following elements:

- Buttons: 'App Express' and 'Packaging'.
- Format Code: A small blue square icon.
- Format Description: An empty text input field.
- Table with columns: 'Select', 'Field Description', and 'Table/System'.
- Buttons: 'Select', 'Select All', 'Deselect All', 'Resequenece'.
- Record navigation: 'NEW RECORD' with left and right arrows, and 'Add', 'Delete', 'Save', 'Retrieve...' buttons.
- Bottom buttons: 'OK', 'Cancel', 'Help'.

	Select	Field Description	Table/System
1	<input type="checkbox"/>	AAI: ADJUSTED AVAILABLE INCOME	E
2	<input type="checkbox"/>	ACADEMIC PROGRAM	E
3	<input type="checkbox"/>	ADD DATE - ISIR	E
4	<input type="checkbox"/>	AGE OF OLDER PARENT	E
5	<input type="checkbox"/>	AI: AVAILABLE INCOME	E
6	<input type="checkbox"/>	ALIEN REGISTRATION NUMBER	E

# *File formats*

Now it's your turn!  
Hands-on Exercise 4





# Queries

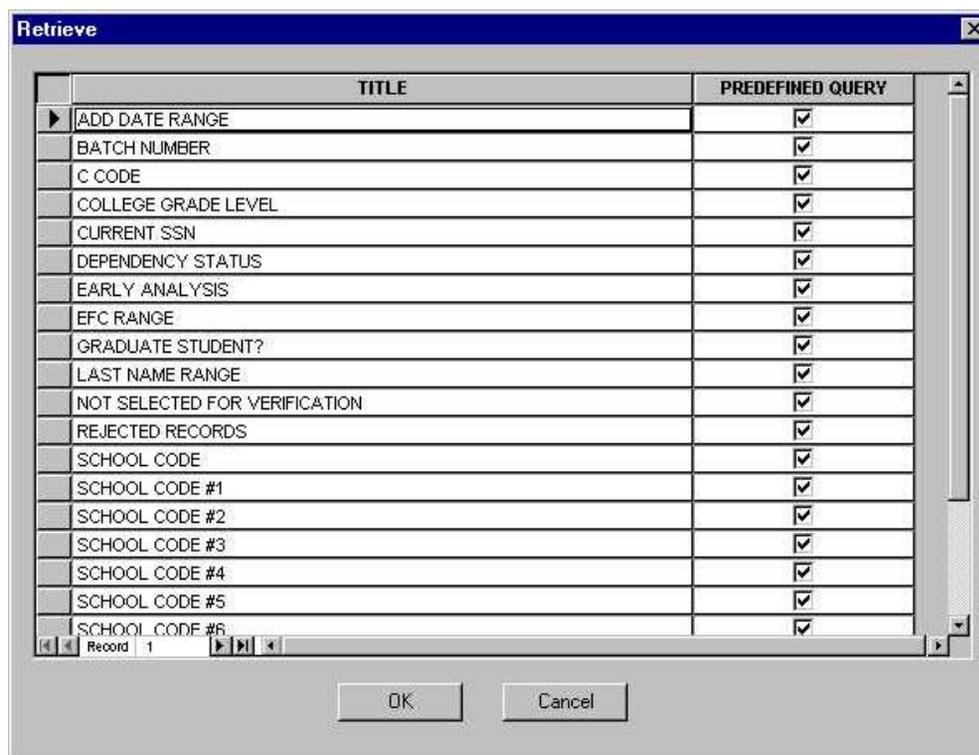
- What is a query?
  - A request for information from a database
  - *“A query is a set of criteria that describes a particular student population. Queries are used in functions like Print, Package, and Export to select specific groups of student records from all the records in the database. Some queries have fixed values, or you can enter different values each time you use the query.”*



*EExpress Help Text*

# Queries

- Predefined queries in EDEExpress



The screenshot shows a 'Retrieve' dialog box with a table of predefined queries. The table has two columns: 'TITLE' and 'PREDEFINED QUERY'. Each row represents a query, and the 'PREDEFINED QUERY' column contains a checked checkbox. The 'TITLE' column has a small triangle icon next to the first row, 'ADD DATE RANGE'. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons, and a status bar showing 'Record 1'.

TITLE	PREDEFINED QUERY
ADD DATE RANGE	<input checked="" type="checkbox"/>
BATCH NUMBER	<input checked="" type="checkbox"/>
C CODE	<input checked="" type="checkbox"/>
COLLEGE GRADE LEVEL	<input checked="" type="checkbox"/>
CURRENT SSN	<input checked="" type="checkbox"/>
DEPENDENCY STATUS	<input checked="" type="checkbox"/>
EARLY ANALYSIS	<input checked="" type="checkbox"/>
EFC RANGE	<input checked="" type="checkbox"/>
GRADUATE STUDENT?	<input checked="" type="checkbox"/>
LAST NAME RANGE	<input checked="" type="checkbox"/>
NOT SELECTED FOR VERIFICATION	<input checked="" type="checkbox"/>
REJECTED RECORDS	<input checked="" type="checkbox"/>
SCHOOL CODE	<input checked="" type="checkbox"/>
SCHOOL CODE #1	<input checked="" type="checkbox"/>
SCHOOL CODE #2	<input checked="" type="checkbox"/>
SCHOOL CODE #3	<input checked="" type="checkbox"/>
SCHOOL CODE #4	<input checked="" type="checkbox"/>
SCHOOL CODE #5	<input checked="" type="checkbox"/>
SCHOOL CODE #6	<input checked="" type="checkbox"/>

# Queries

- Creating a new query
  - Select field to query
  - Choose operator
  - Enter value or choose “Prompt at Execution”
- New for 2002-2003
  - Allows query to compare numeric fields

The screenshot shows a 'Query' dialog box with the following elements:

- Title:** A text field containing 'NEW QUERY'.
- Field to Field Comparison:** An unchecked checkbox.
- Field:** A dropdown menu showing 'SAR C FLAG'.
- Operator:** A dropdown menu showing '='.
- Value:** A text field containing 'Y'.
- Prompt at Execution:** An unchecked checkbox.
- Criteria:** A list box containing the query criteria '[SAR C FLAG = "Y"]'.
- Buttons:** 'Append', 'Remove', 'Change', 'And', 'Or', 'Value Help', 'Add Left', 'Add Right', 'Remove Left', 'Remove Right', 'Add', 'Delete', 'Save', 'Retrieve', 'OK', 'Cancel', 'Help'.



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# Queries

Now it's your turn!  
Hands-on Exercise 5





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# *Finishing up*

- Document Tracking
- User Letters
- User Database
- File Formats
- Queries



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Session 60-27



## *Further assistance*

We appreciate your feedback and comments

### **CPS/WAN Technical Support**

Phone: (800) 330-5947

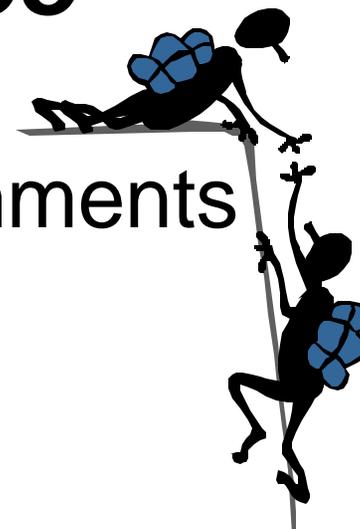
Fax: (319) 358-4260

Email: <cpswan@ncs.com>

TDD/TTY: (800) 511-5806

### **SFATECH**

<http://www.ed.gov/offices/OSFAP/sfatech/index.html>



# Questions

- Individual assistance available for remainder of this session.
- Visit the PC lab for more individual assistance.





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