

Session #12

Using EDExpress for Experienced FAAs

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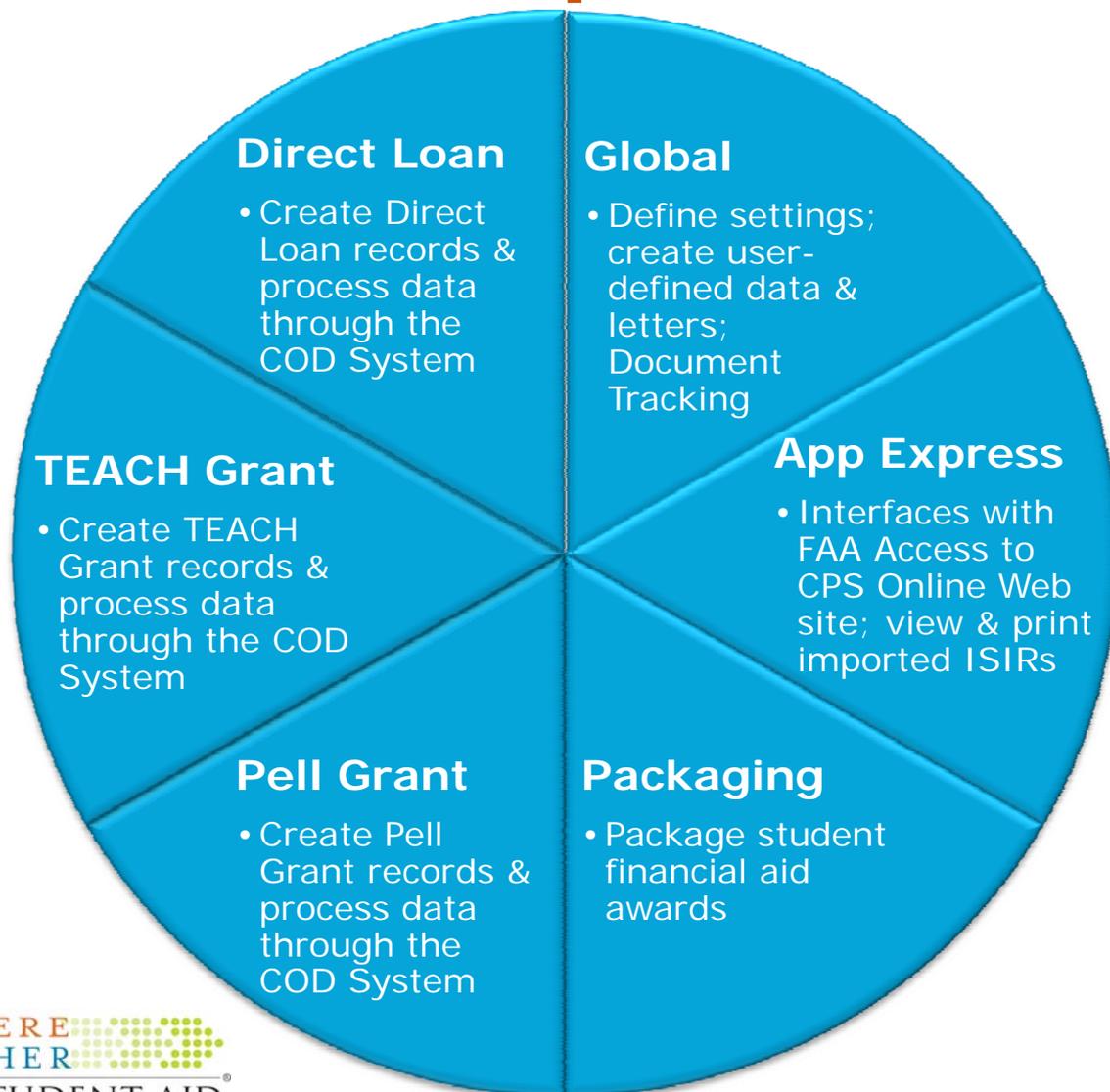


START HERE
GO FURTHER
FEDERAL STUDENT AID®

Agenda

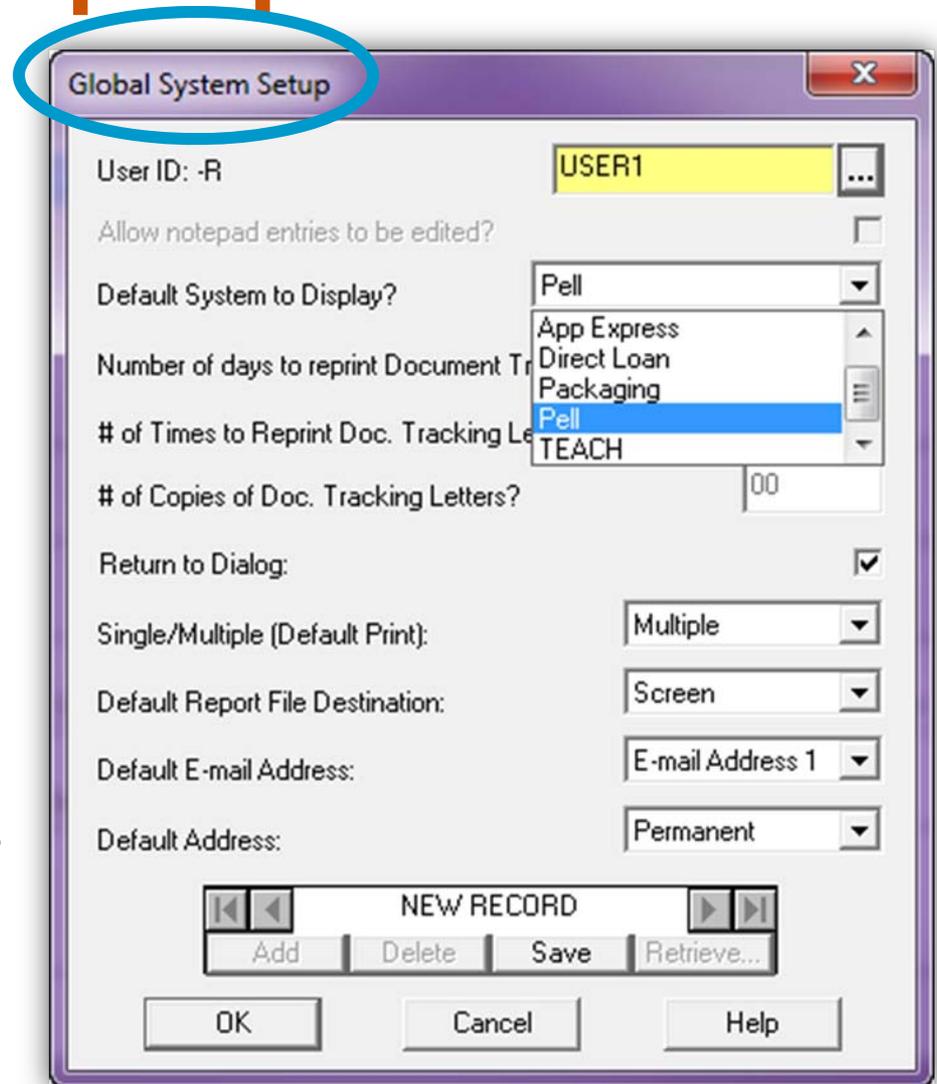
- Overview of EDEExpress
- Time-Saver Setup
- Tools that Come to YOUR Aid
- Highlights of What's Coming in EDEExpress 2011-2012
- Where to Obtain Additional Help/Training

Modules of EDEExpress



Time-Saver Setup Options

- Customizable by EDEExpress user ID
- What system will you use the most?
- Will you usually print out multiple records or a single record?
- Do you usually print to screen first?



Tools That Come to YOUR Aid

Query

Get the records you want

Multiple Entry

Update multiple records at one time

Browse

View your records in multiple ways

User-Defined Fields

Define your own fields to track student info

Prior Year Import

Pull last year's setup, demo, and user data forward



What is a Query?

- A request for a subset of records from your EDEExpress database
- You specify the criteria that describes the subset of records
- Provides flexibility in locating and extracting information from your database

What Makes Up a Query?

- Tools | Query
- A query statement has three main components
 - Data field
 - Operator
 - Value

Query

Global App Express Packaging Direct Loan Pell TEACH

Query Title: ACCEPTED ACTUAL DISBURSEMENTS PREDEFINED QUERY

Field to Field Comparison

Query Field: Operator:

Value

Prompt at Execution

Current Date

Value:

Append Remove Change And Or Value Help

Criteria:

(ACTUAL DISBURSEMENT REJECT CODES = NULL) AND (ACTUAL DISBURSEMENT STATUS = "A")

Add Left (

Add Right (

Remove Left (

Remove Right (

1 of 42

Delete Save Retrieve...

OK Cancel Help

What Makes Up a Query?

- Choices for Value
 - **Prompt at Execution:** To be prompted for the value at the time you use the query (creates a Parameter query)
 - **Current Date:** To use the PC's system date at the time you use the query
 - **Value:** The valid value you always want to use in the query (Fixed value query)
- **Value Help** displays the valid values for the selected field

What Makes Up a Query?

- Use **Parentheses** to indicate the order that the query should be processed
- Both segments of the query connected by **AND** must be true for a record to be selected
- Only one of the segments connected by **OR** must be true for a record to be selected

How Does a Query Work?

Query

Global App Express Packaging Direct Loan Pell TEACH

Query Title: EXAMPLE QUERY

Field to Field Comparison

Query Field: PARENTS' ADJUSTED GROSS INCOME

Value

Prompt at Execution

Current Date

Value: 25000

Append Remove Change And Or Value Help

Criteria:

```
((DEPENDENCY STATUS = "D") AND  
(STUDENT'S STATE OF LEGAL RESIDENCE = "IA")) AND  
((PARENTS' NUMBER IN COLLEGE (PARENTS' EXCLUDED) > "1") OR  
(PARENTS' ADJUSTED GROSS INCOME < 25000))
```

Add Left (Add Right)

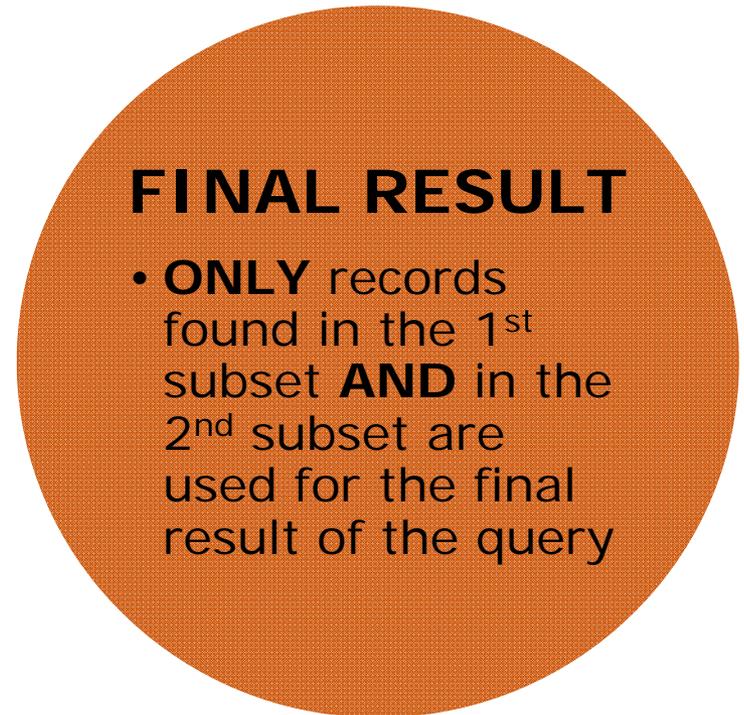
```
((DEPENDENCY STATUS = "D") AND  
(STUDENT'S STATE OF LEGAL RESIDENCE = "IA")) AND  
((PARENTS' NUMBER IN COLLEGE (PARENTS' EXCLUDED) > "1") OR  
(PARENTS' ADJUSTED GROSS INCOME < 25000))
```

OK Cancel Help

Dependent students from Iowa whose parents' number in college is greater than 1 or whose adjusted gross income is less than \$25,000



How Does a Query Work?



Where Can a Query Be Used?

- If the **Selection Criteria** button is enabled on a dialog box, a query can be used
 - Print, Export, and Multiple Entry
 - Import in Packaging, DL, Pell, and TEACH
 - Processes such as global packaging and global calculation of Pell award amounts

Where Can a Query Be Used?

The screenshot displays a software interface with several overlapping dialog boxes. The background window is titled "Print" and shows a report configuration screen for "ISIR". It includes a "Report" dropdown menu, radio buttons for "Single" and "Multiple", and a "Selection Criteria" button circled in orange. Overlaid on this is an "Import" dialog box with "Import Type" set to "Packaging Data - ISIR Data" and a "Selection Criteria" sub-dialog box with "Title" set to "COLLEGE GRADE LEVEL". In the foreground is a "Parameter Query Entry" dialog box with the title "COLLEGE GRADE LEVEL" and a table of parameters.

Field Name	Operator	Field Value	List Field Value
GRADE LEVEL IN COLLEGE	=	2	



What is Multiple Entry?

- You can update various fields in Global, Packaging, Direct Loan (DL), Pell Grant (Pell), and TEACH Grant (TEACH) for multiple students at one time
- Fields available to update depend on the module you select
- Selection Criteria (query or select records) can be used to choose specific records to update

Using Multiple Entry

1st Multiple Entry Dialog

- Select one or more fields to update
- Choose the value for the fields **or**
- Leave the value blank (can choose value on 2nd dialog)
- For some fields, you can also choose to update the value to blank



2nd Multiple Entry Dialog

- Students' names & record identifiers (SSN, Loan ID or Award ID) display
- Fields selected on 1st dialog display
- You can update values on individual records
- You can deselect records so they will not be updated



Using Multiple Entry

Examples of 1st Dialog

TEACH Multiple Entry - Field/Records Selection

Default

#	Select	Field	Value	Change to Blank
1	<input type="checkbox"/>	Award Amount		<input type="checkbox"/>
2	<input checked="" type="checkbox"/>	College Grade Level		<input type="checkbox"/>
3	<input type="checkbox"/>	Disbursement Profile Code	0	<input type="checkbox"/>
4	<input type="checkbox"/>	Enrollment Date	1	<input type="checkbox"/>
5	<input type="checkbox"/>	Enrollment Status	2	<input type="checkbox"/>
6	<input type="checkbox"/>	Origination Cross Reference	3	<input type="checkbox"/>
7	<input type="checkbox"/>	Set Origination Ready to Export	4	<input type="checkbox"/>
8	<input type="checkbox"/>	Teacher Expert Indicator	5	<input type="checkbox"/>
9	<input type="checkbox"/>	Disbursement Number	6	<input type="checkbox"/>
10	<input type="checkbox"/>	Disbursement Date		<input type="checkbox"/>

SSN File
File... []

Report Destination
 Printer File
File... []

Sort By: Last Name

OK Cancel Help

Global Multiple Entry - Field/Records Selection

Default

#	Select	Field	Value	Change to B
1	<input checked="" type="checkbox"/>	Verification Status Code		<input type="checkbox"/>
2	<input type="checkbox"/>	Loan Entrance Interview Date	S	<input type="checkbox"/>
3	<input type="checkbox"/>	Loan Exit Counseling Completed Date	Verified	<input type="checkbox"/>
4	<input type="checkbox"/>	TEACH Entrance Interview Date	W	<input type="checkbox"/>
5	<input type="checkbox"/>	TEACH Exit Counseling Completed Date		<input type="checkbox"/>
6	<input type="checkbox"/>	Transaction Paid On		<input type="checkbox"/>
7	<input type="checkbox"/>	Document Code		<input type="checkbox"/>
8	<input type="checkbox"/>	Document Status		<input type="checkbox"/>
9	<input type="checkbox"/>	Document Received Date		<input type="checkbox"/>

SSN File
File... []

Report Destination
 Printer File Screen
File... []

Sort By: Last Name

OK Cancel Help Selection Criteria

Using Multiple Entry

Global Multiple Entry

	Selected	Last Name	First Name	Middle Initial	SSN	Ver. Status Code
1	<input checked="" type="checkbox"/>	BUNNY	BUGS	A	989-89-898	V
2	<input checked="" type="checkbox"/>	COYOTE	WILE	E	999-99-999	V
3	<input checked="" type="checkbox"/>	DUCK	DAFFY	A	969-69-696	V
4	<input checked="" type="checkbox"/>	RABBIT	ROGER	A	979-79-797	V

Save

Examples of 2nd Dialog

Value for Verification Status Code was selected on 1st dialog

Global Multiple Entry

	Selected	Last Name	First Name	Middle Initial	SSN	Ver. Status Code
1	<input checked="" type="checkbox"/>	BUNNY	BUGS	A	989-89-898	V
2	<input checked="" type="checkbox"/>	COYOTE	WILE	E	999-99-999	S
3	<input checked="" type="checkbox"/>	DUCK	DAFFY	A	969-69-696	
4	<input checked="" type="checkbox"/>	RABBIT	ROGER	A	979-79-797	W

Save Cancel Help

Value for Verification Status Code was not selected on 1st dialog

Using Multiple Entry

- Relevant edits are applied when records are updated
- If an update does not pass edits, the information is printed on a report after the process is finished

New for 2011-2012 in
DL Multiple Entry!

You will be able to:

- Update Loan Amount Approved
- Originate a loan

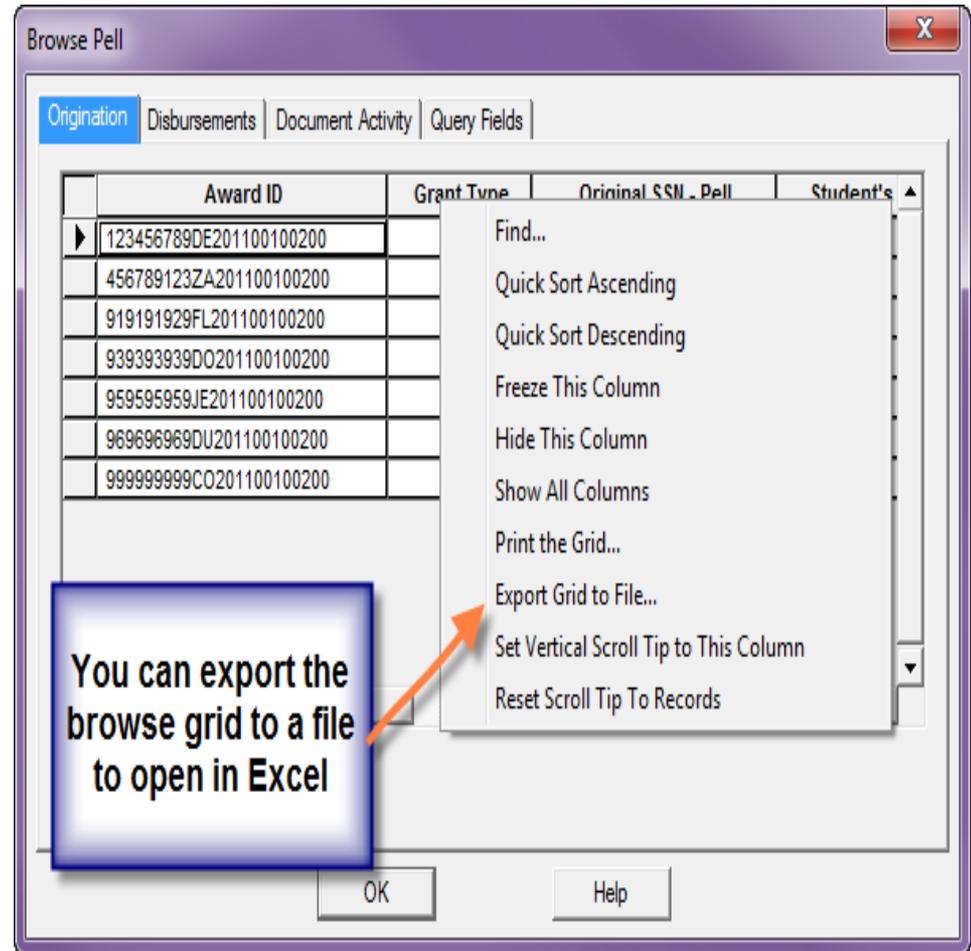


What is Browse?

- Use Browse to view data in a spreadsheet format
- Allows ease of viewing, searching, printing, and exporting multiple records
- Query fields available for each module are also viewable in Browse

Using Browse

- On the Browse grid, click the **right mouse button** in a column heading to display a menu of options you can use to sort and find records



User-Defined Fields

- You can create up to 200 fields for data specific to your school
- Fields you define can be used in all modules
- Plan ahead! User-defined fields cannot be modified
- You can delete a field unless it has been used as part of a query or file format
 - Use caution—deleting a field will also delete any values you have added to student records for that field

Set Up User-Defined Fields

Types of Fields

Dates

- Calendar dates
- Length: 8

Numeric

- Numeric values only
- Length: Up to 10

Text

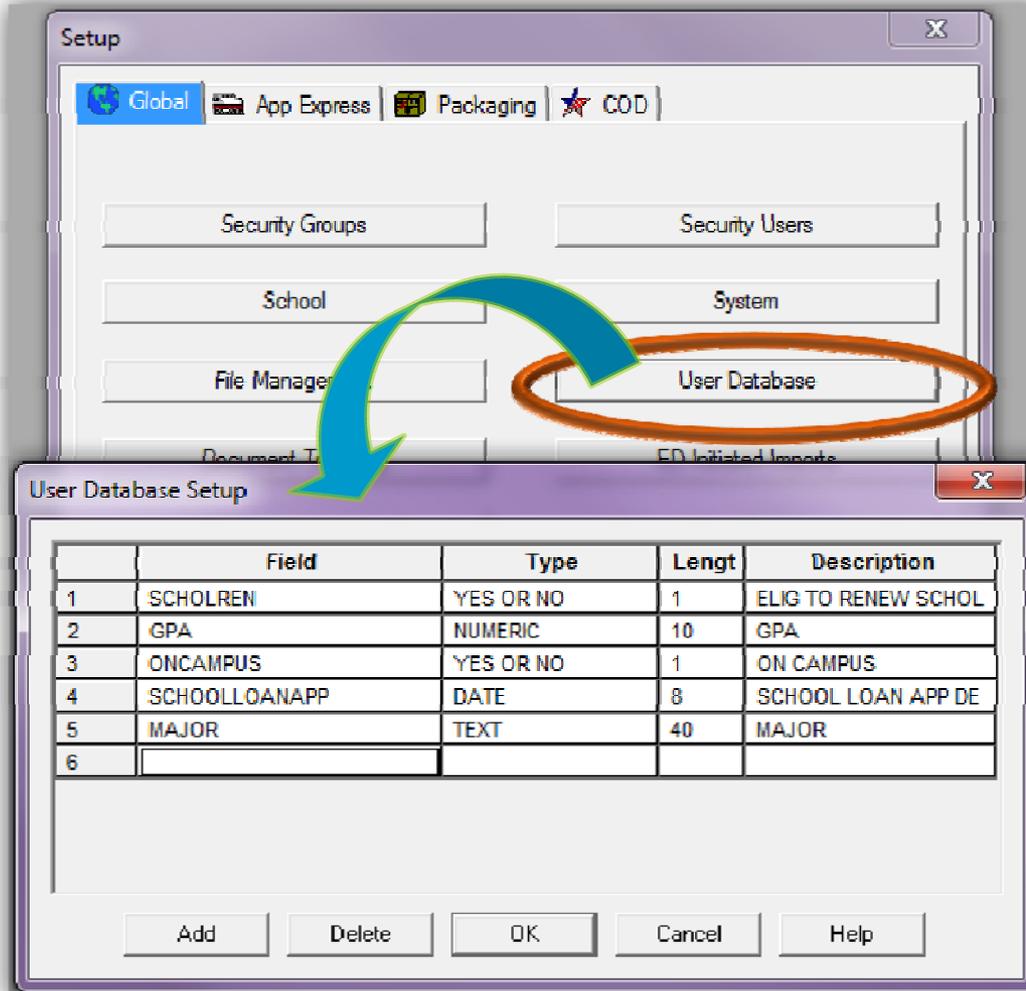
- Both alpha and numeric characters
- Length: Up to 40

Yes or No

- Only true (Yes) or false (No) values
- Length: 1



Set Up User-Defined Fields

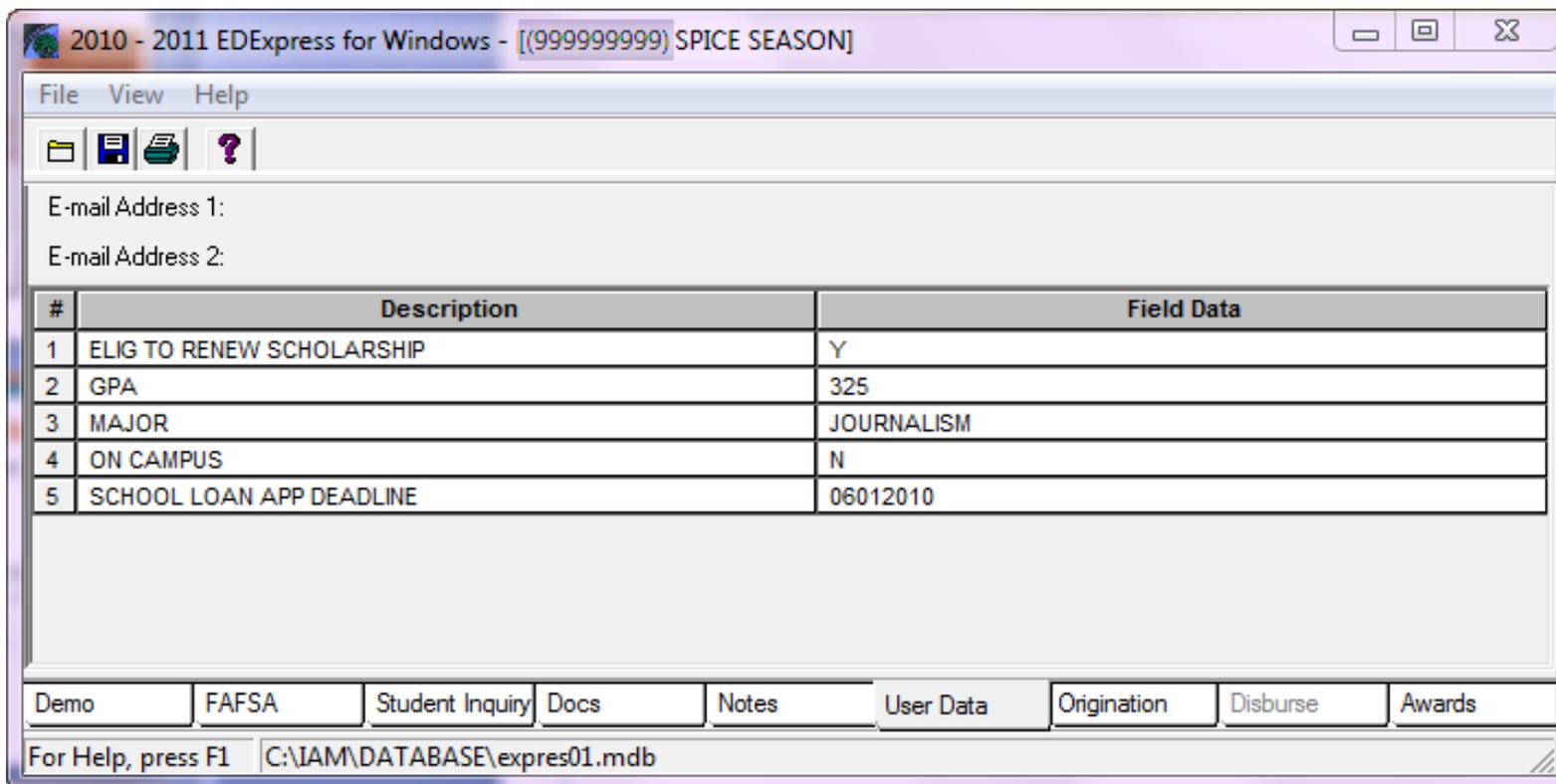


Use keyboard arrow keys to move from one column to another

Click **Add** to display another row for defining the next field



Update User-Defined Fields



2010 - 2011 EExpress for Windows - [(999999999) SPICE SEASON]

File View Help

E-mail Address 1:
E-mail Address 2:

#	Description	Field Data
1	ELIG TO RENEW SCHOLARSHIP	Y
2	GPA	325
3	MAJOR	JOURNALISM
4	ON CAMPUS	N
5	SCHOOL LOAN APP DEADLINE	06012010

Demo FAFSA Student Inquiry Docs Notes **User Data** Origination Disburse Awards

For Help, press F1 C:\IAM\DATABASE\expres01.mdb

Enter values for user-defined fields on the User Data tab



Update User-Defined Fields

- Also update values for user-defined fields using:
 - Global Multiple Entry
 - Import data from your school's system
 - Record Layout found at Print|Global|RL – Import User Data
 - Prior Year Import of User Data
- Go to Print|Global|User Data to print a report of user-defined fields and values

Example for User-Defined Fields

Set up User-Defined Fields

GPA (numeric)

Renew scholarship (yes/no)

User Data Entry

Enter students' GPA

Renew scholarship (Y or N)

Create Packaging Query

GPA > 350

AND

Renew scholarship = Y

Packaging Multiple Entry

Use query to select records

Add scholarship to awards



Importing Prior Year Data

- Begin setting up EDEExpress for the current year by importing information already in your prior year database
- Three options on File|Import|Global tab
 - Prior Year User-Defined Queries, Setup, and File Formats
 - Prior Year Demographic Data
 - Prior Year User Data

Prior Year User-Defined Queries, Setup, & File Formats

- Allows much flexibility to choose exactly what you want to import
- Useful to import in Release 1.0 and then again in Release 2.0
 - Queries and setups for Global, Application Processing, and Packaging can be imported in Release 1.0
 - Queries and setups for all modules can be imported in Release 2.0

Prior Year User-Defined Queries, Setup, & File Formats

Prior Year Move Dialog

	Group	Setup Options	Import
1	QUERY - GLOBAL, APP EXPRESS, PACKAGING		<input checked="" type="checkbox"/>
2	QUERY - DIRECT LOAN		<input checked="" type="checkbox"/>
3	QUERY - PELL		<input checked="" type="checkbox"/>
4	QUERY - TEACH		<input type="checkbox"/>
5	GLOBAL SETUP	Security Groups	<input checked="" type="checkbox"/>
6		Security Users	<input checked="" type="checkbox"/>
7		Document Tracking	<input checked="" type="checkbox"/>
8		User-Defined Letter Text	<input checked="" type="checkbox"/>
9		System	<input checked="" type="checkbox"/>
10		File Management	<input checked="" type="checkbox"/>
11		File Formats	<input checked="" type="checkbox"/>
12		User Database	<input checked="" type="checkbox"/>
13		FAA Access	<input checked="" type="checkbox"/>
14	APPLICATION PROCESSING SETUP	System	<input checked="" type="checkbox"/>
15		File Formats	<input checked="" type="checkbox"/>
16	PACKAGING SETUP	Academic Year Profiles	<input checked="" type="checkbox"/>
17		Fund Maintenance	<input checked="" type="checkbox"/>
18		Award Methodologies	<input checked="" type="checkbox"/>
19		Budgets	<input checked="" type="checkbox"/>
20		SAP Values	<input checked="" type="checkbox"/>
21		System	<input checked="" type="checkbox"/>

Import All records for Setup Options Selected
 Import only Specific records for Setup Options Selected

OK Cancel Help

Select only Groups/Setup Options needed

Import all records for setup options selected **OR** only specific records

Prior Year User-Defined Queries, Setup, & File Formats

- If a query or file format contains a field that no longer exists in the current year, it will not import
- If the code for the query, file format, or setup option already exists in the current year, it will not import or be updated by the prior year import
- If a query, file format, or setup did not import, the reason is printed on a report after the import is finished

Prior Year Demographic Data

- Student's current SSN from the prior year becomes the original SSN in the current year
 - A record from the previous year doesn't import if the current SSN equals the original SSN of a record in the current year

Prior Year Demographic Data

- Select the records or use a query to narrow down the records that import
 - Records from the **previous year** are displayed in a list for selection
 - Global queries from **previous year** are displayed for use
 - Only queries with fixed values for the criteria are available for selection
- Move the Loan Entrance Interview Date if you choose

Prior Year User Data

- The user data field has to exist in both prior year and previous year
- Select the records or use a query to narrow down the records that import (same as Prior Year Demographic Data import)
- A demographic record is created if one does not already exist (same logic as Prior Year Demographic Data import)

Prior Year User Data

Import

Global | App Express | Packaging | Direct Loan | PELL | TEACH

Import Type: Prior Year User Data

Import From:

File... C:\NIAM\DATABASE\EXPRES90.MDB

Report To:

Printer File Screen

File...

Overwrite Existing User Data?

Selection Criteria ...

Select User Data Fields

OK Cancel Help

Select Records - USER DATA

Selected	
<input checked="" type="checkbox"/>	ELIG TO RENEW SCHOLARSHIP
<input checked="" type="checkbox"/>	GPA
<input type="checkbox"/>	ON CAMPUS

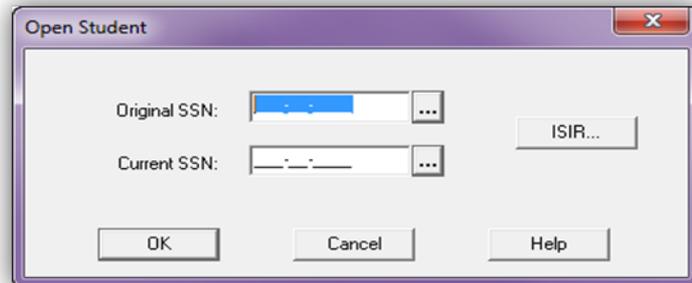
Select only the User Data fields for which you want to import values

Will not overwrite existing values unless you choose

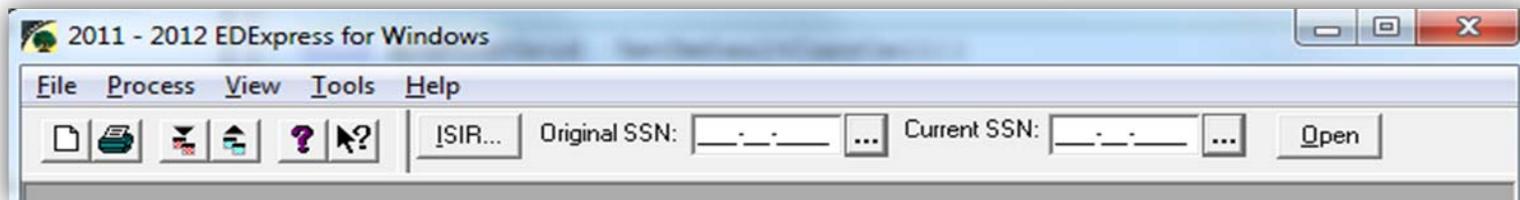


What's coming in 2011-12?

- In 10-11, use a dialog box to open records
 - If a student record is already open, you must close it before opening another record



- In 11-12, use a new toolbar to open records
 - If a student record is already open, switch to a new record without first closing the current record



What's coming in 2011-12?

- DL ISIR and Packaging Imports will create multiple loan types in a single import

Select one or more loan types to create.

In Loan Data - Packaging import, if you do not select any loan type, a loan is created for each loan type packaged for the student.



What's coming in 2011-12?

- New fields will be added to the Demo tab to allow entry of Ability to Benefit data
- When entered, Ability to Benefit data will be sent to the COD System for all award types (DL, Pell, and TEACH)
- Existing Demo tab fields will be reorganized to accommodate the addition of Ability to Benefit fields

What's coming in 2011-12?

- New PLUS Application Acknowledgment fields will be displayed for PLUS and Grad PLUS loans on the DL Origination tab
- The CPS Transaction # field will be required for Grad PLUS and PLUS loan records
- Print dialog boxes for the DL MPN and Disclosure Statements will be updated with an option to print labels in Spanish

What's coming in 2011-12?

- The import edit reports of the following import types will be updated to print an indicator that an Iraq and Afghanistan Service Grant was included in the file:
 - Web-generated Common Record (CRWB12OP)
 - Pell YTD Data (PGYR12OP)
- Iraq and Afghanistan Service Grants will not be added to EDEXpress

Training and other Help

- At this Conference:
 - EDESuite Hands-On (EDEExpress, DL Tools, SSCR): Session 13
 - Using EDEExpress for New FAAs: Session 11
 - Using Direct Loan Tools to Reconcile your Direct Loan Data with the Common Origination and Disbursement System: Session 16
 - PC Lab

Training and other Help

- www.fsadownload.ed.gov
 - EDEExpress Desk References/Cover Letters/Installation Guides
 - Technical References
- www.ifap.ed.gov
 - EDEExpress Online Training for 2010–2011
 - Publications
- EDEExpress Help Text

EDExpress Technical Assistance

CPS/SAIG Technical Support:

- Phone: 800-330-5947
- TDD/TTY services: 800-511-5806
- E-mail: CPSSAIG@ed.gov
- Representatives are available Monday through Friday, 8 a.m. to 8 p.m. ET

Contact Information

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