

Packaging

Record Descriptions

Institutions have the ability to manipulate their packaging database with an external import function. This function lets you add or modify records in EDEExpress' packaging module by importing external **add** and/or external **change** records. For example, you may find the need to import packaging data into EDEExpress from your institutional system via an external add file.

You can also export packaging data out of EDEExpress; e.g, once you have packaged your students, you can upload the information to your disbursement system. Packaging import record layouts are provided in this section and an export layout can be printed from EDEExpress. A brief description of each layout is provided below.

This section provides the user with instruction, flowcharts, and record layouts for interfacing their own software with EDEExpress for packaging. Questions regarding issues with interfacing the school system with EDEExpress should be directed to CPS Customer Service at 1-800-330-5947.

Import External Add Record Description

In EDEExpress, each add record imported runs through field by field editing during the save process. All records failing edits produce a line on an error report. Entries on the report display rejects regarding the record or indicate warnings. Other entries list records skipped. The edit report contains a line for each record that has a reject, warning, or has been skipped. The report contains the student's social security number (SSN), reject or warning message, and, if appropriate, the data field in question.

The following fields will receive a rejected error message if they are invalid or left blank during the import add process:

- Student's Original SSN
- Name Identifier
- Transaction Number
- Academic Year Profile Code

All other fields in error will receive a warning message if (1) the data field content is invalid or (2) a required field is left blank

Import External Change Record

Like the add record, each imported change record runs through field by field editing during the save process. All records failing edits produce a line on an error report. Entries on the report indicate warnings about the record, or records skipped. The report contains the student's social security number (SSN), warning message, and, if appropriate, the data field in question.

Requirements

The following three requirements must be addressed when building your packaging change record:

1. The Social Security Number (SSN) on the change record must be for a student that already exists on the packaging database.
2. Only records that are not packaged (i.e., packaging status is equal to **Not Ready to Package**, **Ready to Package**, or **Unpackaged**) can be updated through the import change process.
3. Fields that are Display Only cannot be updated through import change.

Special Instructions

 Funds, outside resources, and documents requiring change must be changed via multiple entry in EDEExpress. Changes can be made within student records as well.

Import Change Field Record Description

When changing data through the import external change process, you must use the correct field number for the fields you want to change. The record description provides you with the information you need for changing data.

Export Record Description

Users can export specific information from packaged student records in EDEExpress to other institutional systems, including disbursement systems, by defining a customized export record layout via the File Format option under the Tools menu item in EDEExpress. The File Formats can be printed in layout format by selecting file/print/packaging/record layout - user defined from the main screen of EDEExpress. The export record layout provides the title, type (alpha/numeric), size, and valid values for each field.

In order to setup your file formats, go to the Tools menu in EDEExpress, select the File Format option, and then Packaging. You will need to give the file format a two-character (alpha or numeric) identifier and a title. You can select fields from the Packaging record to export by choosing either Selected Fields or All Fields. Selected fields will allow you to designate specific fields to export to other institutional

systems, as well as allowing you to sequence the data in the order you desire. All Fields will export all pertinent packaging data to other institutional systems in a pre-determined order.

An external export is initiated by going to File/Export/Packaging/Packaging Data. On this screen, you will need to designate the file format code you wish to use, and the destination of the file that will be created. You can also break down your export by using available selection criteria

Packaging Import External Add Record Description

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
1	1	9	9	Student's SSN	001010001 to 999999999	Right
2	10	11	2	Name ID	Uppercase A-Z	Left
3	12	13	2	Transaction Number	00 to 99	Right
4	14	22	9	Student's Current Social Security Number	001010001 to 999999999	Right
5	23	38	16	Student's Last Name	0-9 Uppercase A-Z Space(s) (period) ' (apostrophe) (dash) Can be blank	Left
6	39	47	9	Student's First Name	0-9 Uppercase A-Z Space(s) (period) ' (apostrophe) (dash) Can be blank	Left
7	48	48	1	Middle Initial	Uppercase A-Z Can be blank	Left
8	49	76	28	Permanent Mailing Address	0-9 Uppercase A-Z (Period) ' (Apostrophe) (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) (Slash) Space(s) Can be blank	Left
9	77	92	16	Student's Permanent City	0-9 Uppercase A-Z (Period) ' (Apostrophe) (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) (Slash) Space(s)	Left
10	93	94	2	Student's Permanent State	Uppercase A-Z Valid postal code See State/Country/Jurisdiction Table Can be blank	Left
11	95	99	5	Student's Permanent Zip Code	00000 to 99999	Right
12	100	109	10	Student's Permanent Phone Number	0000000000 to 9999999999 Can be blank	Right

Packaging Import External Add Record Description (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
13	110	137	28	Local Address	0-9 Uppercase A-Z . (Period) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s)	Left
14	138	153	16	Local Address City	0-9 Uppercase A-Z . (Period) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Can be blank	Left
15	154	155	2	Local Address State	Uppercase A-Z Valid Postal Codes	Left
16	156	164	9	Local Zip Code	000000000 to 999999999	Right
17	165	174	10	Local Phone Number	0000000000 to 9999999999	Left
18	175	176	2	Grade Level in College in 1998-99	01 = 1st year, never attended college 02 = 1st year, attended college before 03 = 2nd year/sophomore 04 = 3rd year/junior 05 = 4th year/senior 06 = 5th year or more undergraduate 07 = 1st year graduate/professional 08 = 2nd year graduate/professional 09 = 3rd year graduate/professional 10 = Beyond 3rd year graduate/professional Blank = No response	Left
19	177	180	4	Academic Year Profile Code	0-9 Uppercase A-Z Valid Academic Year Profile code defined in Packaging Setup-AYP. Can be blank	Left
20	181	181	1	Dependency Status	I=Independent D=Dependent P=Professional Judgement Can be blank	Left

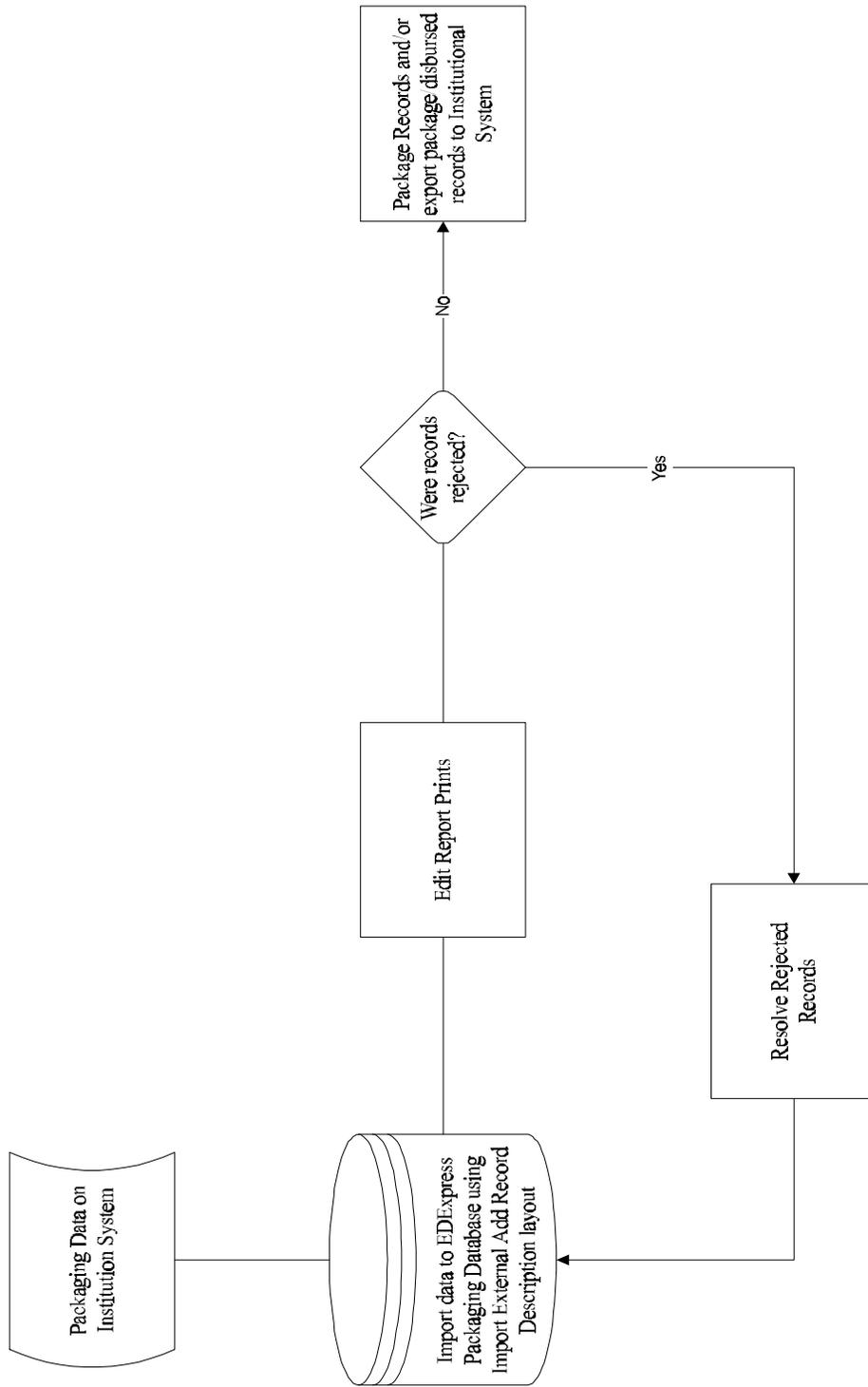
Packaging Import External Add Record Description (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
21	182	185	4	Budget Code	0-9 Uppercase A-Z + (plus sign) - (dash) * (asterisk) # (number sign) . (period) ' (apostrophe) Can be blank	Left
22	186	190	5	Primary EFC	00000 to 99999 Blank = None calculated	Left
23	191	191	1	Pell Verification Status	Uppercase A-Z Contain only: N = Not Selected (Default) A = Accurate Data W = Without Documentation T = Tolerance C = Calculated R = Reprocessed S = Selected by CPS, Not Verified	Left
24	192	193	2	Verification Code	Uppercase A-Z 1-99 Can be blank	Left
25	194	199	6	Total Income	-999999 to 999999	Right
26	200	200	1	Enrollment Status Term 1	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
27	201	201	1	Enrollment Status Term 2	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
28	202	202	1	Enrollment Status Term 3	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
29	203	203	1	Enrollment Status Term 4	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
30	204	204	1	Enrollment Status Term 5	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right

Packaging Import External Add Record Description (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
31	205	205	1	Housing Status	1 = on-campus 2 = off-campus 3 = with parent(s) Can be blank	Left
32	206	206	1	SAP Indicator	Defined description in Packaging Setup SAP Values or blank	Left
33	207	207	1	Default Status Indicator	Y = In Default N = Not in Default Z = Override	Left
34	208	208	1	Interested in Student Employment?	1 = Yes 2 = No Can be blank	Left
35	209	209	1	Interested in Student Loans?	1 = Yes 2 = No Can be blank	Left
36	210	210	1	Interested in Parent Loans for Students?	1 = Yes 2 = No Can be blank	Left
37	211	212	2	Student's State of Legal Residence	Uppercase A-Z Valid postal code See State/Country/Jurisdiction Table Can be blank	Left
38	213	213	1	Borrower Based Indicator	1 = Yes Blank = No	Left
39	214	221	8	Transaction Processed Date	Format is CCYYMMDD 19980101 to 19991231	Right
40	222	222	1	Simplified Needs Indicator	Checked = Yes Not Checked = No	Left
41	223	223	1	Overaward Indicator	Y = Overaward exists N= No, Overaward exists E = Exception R = Resolved or blank	Left
42	224	228	5	Pell EFC	00000 to 99999	Right
43	229	229	1	Automatic Zero EFC	Y = EFC set to zero based on income criteria Blank = Flag not set	Left
44	230	230	1	Update Demo Record Flag	Y = Yes updata demo record blank = No do not update demo record	Left

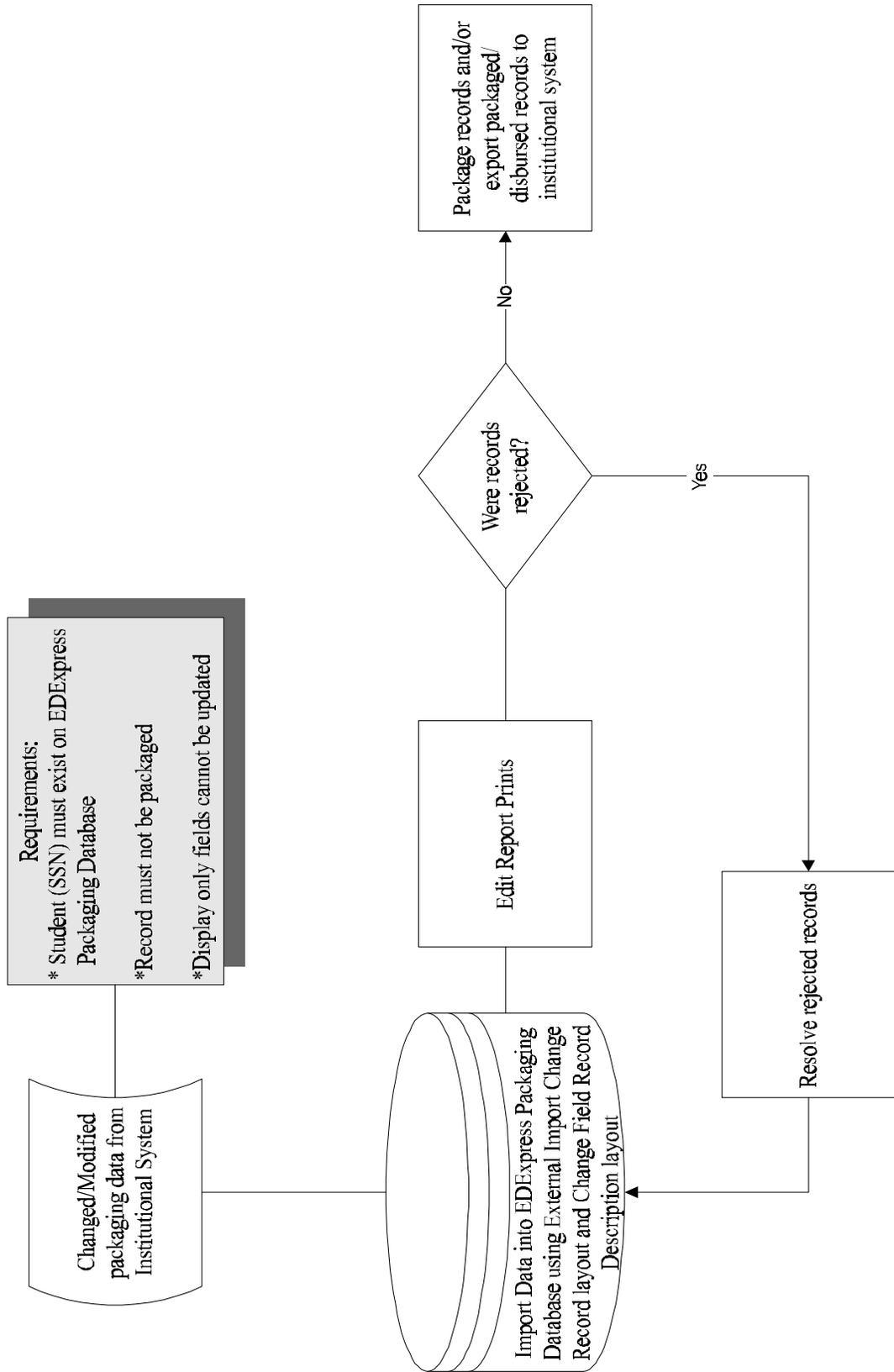
Packaging Import External Add Record Description Flow Chart



Packaging External Import Change Record

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
1	1	9	9	Original SSN	001010001 to 999999999	Right
2	10	11	2	Name ID	Uppercase A-Z	Left
3	12	13	2	Package Sequence	01 - 99	Right
4	14	15	2	Sequence Numbers	01-99	Right
5	16	19	4	Change Field Number 1	Field number representing the first field to be changed.	Left
6	20	47	28	Value 1	The value first field should be changed to.	Left
7	48	51	4	Change Field Number 2	Field number representing the second field to be changed.	Left
8	52	79	28	Value 2	The value second field should be changed to.	Left
9	80	83	4	Change Field Number 3	Field number representing the third field to be changed.	Left
10	84	111	28	Value 3	The value third field should be changed to.	Left
11	112	115	4	Change Field Number 4	Field number representing the fourth field to be changed.	Left
12	116	143	28	Value 4	The value fourth field should be changed to.	Left
13	144	147	4	Change Field Number 5	Field number representing the fifth field to be changed.	Left
14	148	175	28	Value 5	The value fifth field should be changed to.	Left
15	176	179	4	Change Field Number 6	Field number representing the sixth field to be changed.	Left
16	180	207	28	Value 6	The value sixth field should be changed to.	Left
17	208	211	4	Change Field Number 7	Field number representing the seventh field to be changed.	Left
18	212	239	28	Value 7	The value seventh field should be changed to.	Left
19	240	243	4	Change Field Number 8	Field number representing the eighth field to be changed.	Left
20	244	271	28	Value 8	The value eighth field should be changed to.	Right
21	272	275	4	Change Field Number 9	Field number representing the ninth field to be changed.	Left
22	276	303	28	Value 9	The value ninth field should be changed to.	Left
23	304	307	4	Change Field Number 10	Field number representing the tenth field to be changed.	Left
24	308	335	28	Value 10	The value tenth field should be changed to.	Left

Packaging External Import Change Flow Chart



Packaging Import Change Field Record Description

Field #	Field Length	Field Name	Valid Field Content	Justify
004	9	Student's First Name	0-9 Uppercase A-Z Space(s) (period) ' (apostrophe) (dash) Can be blank	Left
005	1	Middle Initial	Uppercase A-Z Can be blank	Left
006	16	Student's Last Name	0-9 Uppercase A-Z Space(s) (period) ' (apostrophe) (dash) Can be blank	Left
008	28	Permanent Mailing Address	0-9 Uppercase A-Z (Period) ' (Apostrophe) (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) (Slash) Space(s) Can be blank	Left
009	16	Student's Permanent City	0-9 Uppercase A-Z (Period) ' (Apostrophe) (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) (Slash) Space(s)	Left
010	2	Student's Permanent State	Uppercase A-Z Valid postal code See State/Country/Jurisdiction Table Can be blank	Left
011	5	Student's Permanent Zip Code	00000 to 99999	Right

Packaging Import Change Field Record Description (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
013	16	Local Address City	0-9 Uppercase A-Z . (Period) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Can be blank	Left
014	2	Local Address State	Uppercase A-Z Valid Postal Codes	Left
015	9	Local Zip Code	000000000 to 999999999	Right
016	10	Student's Permanent Phone Number	0000000000 to 9999999999 Can be blank	Right
017	20	Student's Driver's License Number	0-9 Uppercase A-Z Space(s) - (dash) * (asterisk) Can be blank	Left
017	28	Local Address	0-9 Uppercase A-Z . (Period) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s)	Left
018	2	Student's Driver's License State Code	Valid two-letter postal code See State/Country/Jurisdiction Table Can be blank	Left
019	2	Student's State of Legal Residence	Uppercase A-Z Valid postal code See State/Country/Jurisdiction Table Can be blank	Left
020	8	Student's Date of Birth	Format is CCYYMMDD 19000101 to Current Date	Right
022	5	EFC	00000 to 99999	Right
023	4	Academic Year Profile Code	0-9 Uppercase A-Z Valid Academic Year Profile code defined in Packaging Setup-AYP. Can be blank	Left
024	1	Default Status Indicator	Y = In Default N = Not in Default Z = Override	Left

Packaging Import Change Field Record Description (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
025	1	SAP Indicator	Defined description in Packaging Setup SAP Values or blank	Left
026	4	Budget Code	0-9 Uppercase A-Z + (plus sign) - (dash) * (asterisk) # (number sign) . (period) ' (apostrophe) Can be blank	Left
027	1	Dependency Status	I=Independent D=Dependent P=Professional Judgement Can be blank	Left
028	2	Verification Code	Uppercase A-Z 1-99 Can be blank	Left
029	1	Enrollment Status Term 1	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
030	1	Enrollment Status Term 2	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
031	1	Enrollment Status Term 3	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
032	1	Enrollment Status Term 4	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
033	1	Enrollment Status Term 5	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
037	6	Total Income	-999999 to 999999	Right

Packaging Import Change Field Record Description (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
039	2	College Grade Level	01 = 1st yr/never attended college 02 = 1st yr/attended college before 03 = 2nd year 04 = 3rd year 05 = 4th year 06 = 5th yr/other undergraduate 07 = 1st year graduate/professional 08 = 2nd year graduate/professional 09 = 3rd year graduate/professional 10 = Beyond 3rd year graduate/professional or blank	Right
040	1	Housing Status	= on-campus 2 = off-campus 3 = with parent(s) Can be blank	Left
043	1	Interested in Student Employment?	1 = Yes 2 = No Can be blank	Left
044	1	Interested in Student Loans?	1 = Yes 2 = No Can be blank	Left
045	1	Interested in Parent Loans for Students?	1 = Yes 2 = No Can be blank	Left
052	1	Packaging Result	A = Any part of the Packaging Results accepted D = Package Totally Declined S = Suspend	Left
292	1	Automatic Zero EFC	Y = EFC set to zero based on income criteria Blank = Flag not set	Left
294	5	Pell EFC	00000 to 99999	Right
295	10	Local Phone Number	0000000000 to 9999999999	Left
296	1	Pell Verification Status	Uppercase A-Z Contain only: N = Not Selected (Default) A = Accurate Data W = Without Documentation T = Tolerance C = Calculated R = Reprocessed S = Selected by CPS, Not Verified	Left

Packaging Import Change Field Record Description (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
298	1	Simplified Needs Indicator	Checked = Yes Not Checked = No	Left
299	8	Transaction Processed Date	Format is CCYYMMDD 19980101 to 19991231	Right
300	1	Prior Degree	Checked = Yes Not Checked = No	Left

Packaging Export Record Description Flow Chart

