SAIG Desk Reference for

EDconnect

Version 7.2

U.S. Department of Education

Table of Contents

Getting Started

Destination Point Administration

The Destination Point Administrator (DPA) is the "owner" of the Student Aid Internet Gateway (SAIG) mailbox and is responsible for security within EDconnect. The DPA creates and controls **Security Groups** and the users within those groups through the **Security View**.

Security Groups share a common **TG number**, a common **Connection Type** ("Production" or "Test"), a common **SAIG Password**, and common access to the SAIG. The main purpose of separating users into groups is to regulate user access within EDconnect. Groups can also be useful for dividing functions among users. Folder icons represent **Security Groups** in the **Security View**.

Users are individuals within **Security Groups** who share a common access to EDconnect and the SAIG.

- Each **User ID** has its own EDconnect **User Password**. The DPA should have a signed **SAIG User Statement** on file for each user.

- When you enroll through **fsawebenroll.ed.gov**, you are required to print the **SAIG User Statement** as part of the online enrollment process.

- You should retain the statements at your institution for auditing purposes.

Helpful Hints

- You control **SAIG Passwords** and user access to EDconnect at the *group* level.

- You control startup options, **User Passwords**, color preferences, and file directory locations at the *user* level.

- **User IDs** can belong to different groups in the **Security View**.

User Logons

A **User ID** can belong to several different **Security Groups** within EDconnect. This method enables a single user to send and receive data using different **TG numbers** and **Connection Types** ("Production" or "Test").

- Each group can be associated with a different **TG number** or **Connection Type**.

- If a user belongs to more than one group, the EDconnect **Logon** dialog box enables the user to select the group to log in under for that session.

In the illustration below, the **User ID** "Gabrielle" belongs to and can log into the software under either "Administration Group" or "Financial Aid Staff."

Security View

The **Security View** controls user access to EDconnect. This view enables you to set up **Security Groups** as well as to create individual users within those groups.

- You control user access and SAIG connection information at the *group* level.

- You control user identity and login data at the *user* level. An illustration of an EDconnect **Security View** is shown below:
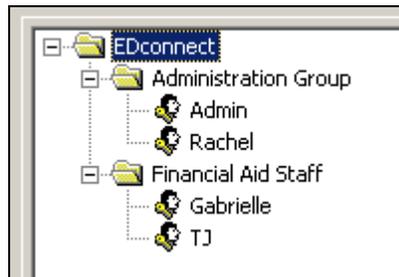
In the example above, "Administration Group" and "Financial Aid Staff" represent **Security Groups**, while the individual names below the group names signify users within those groups. ("Admin" is a self-expiring **User ID** created by default under "Administration Group" during the installation of EDconnect.)

You can move a user to another group by dragging and dropping the **User ID**.

To drag and drop a User ID

1. Select the **User ID** by pressing your left mouse button to highlight it.

2. Move your cursor over the group into which you want to drop the **User ID**.

3. Release the mouse button.

You can copy a user to another group by copying and pasting the **User ID**.

To copy a User ID

1. Click on the **User ID** you want to copy.

2. Select **Copy** from the **Edit** menu.

3. Click on the group to which you want to copy the **User ID**.

4. Select **Paste** from the **Edit** menu.

Security Groups

Within EDconnect, a **Security Group** represents a collection of users who:

- Connect to the SAIG using the same **TG number**, the same **Connection Type** ("Production" or "Test"), and the same **SAIG Password**

- Have identical access to EDconnect and the SAIG.

An institution can have one or more **Security Groups** with varying levels of access to EDconnect functions.

To add a "Production" Security Group

1. Open the **Security View** by selecting **New** from the **File** menu and selecting **Security View** from the list of views. You can also click the **Security View** button on EDconnect's main toolbar.

2. Right-click on the **EDconnect** folder.

3. Select **Insert** from the pop-up menu. The **Group Wizard** will appear on your screen.

4. Complete the **General Information** tab by providing a group name and the expiration period for user passwords. Click **Next**.

5. Set up access rights for all the users in the group by completing the **Access Rights** tab. Click **Next**.

6. Set up **SAIG Password** information for the group by completing the **SAIG Information** tab. Leave the **Connection Type** set to the default value "Production."

7. Click **Finish**.

To add a "Test" Security Group

- If you have been advised to set up a test Security Group to access the SAIG test system, follow the steps above but in step 6 select "Test" as the **Connection Type** on the **SAIG Information** tab.

Helpful Hint

- You can also access the **Group Wizard** by highlighting **EDconnect** in the **Security View** and selecting **Insert Record** from the **Record** menu.

Users

Within EDconnect, users represent the individuals within **Security Groups** who access the SAIG through that group's **TG number**. You add users to **Security Groups** in the **Security View**. Users have their own **User IDs** and corresponding passwords.

To add a User ID

1. Open the **Security View** by selecting **New** from the **File** menu and selecting **Security View** from the list of views. You can also click the **Security View** button on EDconnect's main toolbar.

2. Right-click on the **Security Group** to which you want to add a user.

3. Select **Insert** from the pop-up menu. The **User Wizard** will appear on your screen.

4. Complete the information on the **Identification** tab. Click **Next**.

5. Change the defaults, if desired, on the **General Information** tab. Click **Next**.

6. Change the default directory settings, if desired, on the **Directory Settings** tab. The drop-down menu (above the **Browse** button) enables you to set the path for the EDconnect database, the **Send** path, and the **Receive** path. Click **Next**.

7. Choose your color preferences. Click **Next**.

8. Choose your printing preferences.

9. Click **Finish**.

Helpful Hints

- The password you establish through the **User Wizard** is associated with your **User ID** and enables you to log into EDconnect.

- The password you establish through the **Group Wizard** is associated with your **TG number** and enables your destination point to connect to the SAIG.

SAIG Connections

Remote Access Service (RAS)

If you connect to the Internet using a modem and an Internet Service Provider (ISP), you need RAS installed and running on your computer in order to connect to the SAIG.

Windows 2000 Professional

If you have Windows 2000 Professional installed on your PC, you should already have a compatible version of RAS.

If the EDconnect **Startup Information** dialog flags RAS as a problem, contact CPS/SAIG Technical Support at 800/330-5947 or by e-mail at **CPSSAIG@ed.gov** for assistance.

Windows XP Home or Professional

If you have Windows XP Home or Professional installed on your PC, you should already have a compatible version of RAS.

If the EDconnect **Startup Information** dialog flags RAS as a problem, contact CPS/SAIG Technical Support at 800/330-5947 or by e-mail at **CPSSAIG@ed.gov** for assistance.

Helpful Hint

- If you do not use a modem to connect to the Internet, you do not need RAS in order to use EDconnect. After you select "Direct Connection" as the **Connection to use**, EDconnect should no longer flag RAS as an error.

Selecting a SAIG Connection

1. Select **Customize** from the **Tools** menu.

2. Select the **Connection** tab on the **Properties** dialog, if not already selected.

3. Select a connection from the drop-down list in the **Connection to use** selection box. See *Important Notes*, below, for information about selecting a connection.

4. (Optional) Click **Test** to test the connection you have selected.

5. Click **OK**.

Important Notes

- The drop-down list in the **Connection to use** selection box displays a list of Internet connections available on your computer.

  – If you have a direct connection to the Internet, such as DSL, T1, or a cable modem, "Direct Connection" may be the only option listed.

  – If you connect to the Internet using a modem and an ISP, in most cases your ISP's dial-up connection will appear on the list.

  – Some ISPs use proprietary dial-up connections that are created when you install their communications software.

  – Although EDconnect *may* be able to dial your ISP and connect to the Internet through a proprietary dial-up connection, the connection may use protocols that will prevent EDconnect from sending and receiving data over the SAIG.

  – Some ISP-provided communications programs do not create standard dial-up connections at all, so your Internet connection may not appear on the **Connection to use** drop-down list.

- You can select "Direct Connection" even if you connect to the Internet using a modem and an ISP.

  – Once you connect to the Internet through your ISP, the open Internet connection becomes a "Direct Connection" that will allow EDconnect to communicate with the SAIG.

  – Selecting "Direct Connection" and connecting to the Internet *before* using EDconnect avoids potential problems associated with proprietary dial-up connections.

- If you select "Direct Connection," you will need to connect to the Internet through your ISP the way you normally connect *before* sending and receiving data using EDconnect.

- If you select your ISP's dial-up connection and are unable to send and receive data using EDconnect, select **Customize** from the **Tools** menu and choose "Direct Connection" from the **Connection to use** drop-down list. You will need to connect to the Internet through your ISP the way you normally connect *before* sending and receiving data using EDconnect if you select "Direct Connection."

Warning

- Do *not* select any dial-up connections associated with older versions of EDconnect, such as "SAIG-0" or "T4WAN-0."

Firewalls

A firewall is a barrier between your computer or your Local Area Network (LAN) and an external source, such as the Internet.

- The barrier can be software, hardware, or a combination of the two.

- A firewall examines each packet of information coming into and going out of your computer and prevents unauthorized packets from being sent or received.

A port is a pre-defined "channel," numbered from 0 to 65535, used by your computer to send and receive specific kinds of data. Your computer usually sends and receives e-mail through port number 23 and makes standard Internet connections through port number 80.

A firewall can prevent EDconnect from communicating with the SAIG by blocking the packets of information your computer is trying to send to and receive from the SAIG.

Determining If You Are Behind a Firewall

- If you have trouble connecting to the SAIG after installing the new version of EDconnect, contact your technical support staff to see if you are behind a firewall.

- "Error -1" usually means that the port used by EDconnect to send and receive data is blocked.

  Your technical support staff will need to open port number 26581 for inbound and outbound TCP/IP traffic and give your computer access to **saigmailbox.ed.gov** (**saigmailboxdev.ed.gov** for the test system) to allow EDconnect to communicate through the firewall.

Wizards

EDconnect contains several wizards that assist you in your initial setup of the software. The following table describes each of the wizards:

Wizard Name	Function	Access
Group Wizard	Prompts you for all necessary information to set up a security group.	Select **Yes**, when prompted, to update a group. Choose to insert a group in the **Security View**.
User Wizard	Prompts you for all necessary information to set up a user.	Select **Yes**, when prompted, to update a user. Choose to insert a user in the **Security View**.
SAIG Connection Wizard	Prompts you to select a connection to use to send and receive data.	Select **Yes**, when prompted, to select a connection.
SAIG Transmission Wizard	Conducts a brief test to see if EDconnect is able to send and receive files.	If you have not completed the test, this wizard automatically appears on your screen after you log into EDconnect.

Passwords

Types of Passwords

EDconnect requires two different types of passwords: **User Passwords** and **SAIG Passwords**.

Each user must enter a **User Password** to log into the software. EDconnect uses the **SAIG Password** to connect to the SAIG.

After you have established your **SAIG Password**, you do not need to enter the **SAIG Password** in order to transmit. EDconnect stores the **SAIG Password** and sends it automatically each time you connect to the SAIG.

User Password

You set or change the **User Password** on the **User Properties** dialog.

1. Right-click on a **User ID** in **Security View.**

2. Select **Properties** from the pop-up menu to access the **User Properties** dialog.

SAIG Password

You set or change the **SAIG Password** on the **Group Properties** dialog.

1. Right-click on a **Security Group** in the **Security View.**

2. Select **Properties** from the pop-up menu to access the **Group Properties** dialog.

User Password

Each user must enter a **User Password** to log into the software. You can set or change your **User Password** on the **Identity** tab of the **User Properties** dialog. Each **User ID** in the EDconnect **Security View** has its own personal password.

When you start EDconnect, the **Logon** dialog box will appear. Enter or select your **User ID** from the drop-down list and enter the **User Password** you established for your **User ID** on the **User Properties** dialog.

EDconnect has specific rules for **User Passwords**:

- Must be eight characters long

- Must begin with an alpha character

- Must have at least three different characters

- Can contain special keyboard characters

  User passwords can contain special keyboard characters, such as @, #, and $, but because some computer platforms use certain special characters as command characters, we recommend avoiding % (percent), ^ (caret), & (ampersand), \ (backslash), / (forward slash), < (less than), > (greater than), and | ("pipe" symbol).

Helpful Hints

- If you forget your **User Password**, try selecting "Admin" as the **User ID** and using the password "PASSWORD" (uppercase and without the quotation marks). Since the "Admin" **User ID** expires after three uses, be sure to change your **User Password** before exiting EDconnect.

- If you still are unable to log into EDconnect, please contact CPS/SAIG Technical Support at 800/330-5947 or by e-mail at **CPSSAIG@ed.gov** for assistance.

Changing Your User Password

1. Open the **Security View** by selecting **New** from the **File** menu and selecting **Security View** from the list of views. You can also click the **Security View** button on EDconnect's main toolbar.

2. Right-click on your **User ID** in the **Security View**.

3. Select **Properties** from the pop-up menu.

4. On the **Identity** tab of the **User Properties** dialog, type a new password in the **New** text box.

5. Type the password again in the **Verify** text box using the same capitalization.

6. Click **OK** or press the **Enter** key on your keyboard. This will return you to the **Security View**.

7. Use this password, in conjunction with your **User ID**, the next time you log into EDconnect.

Helpful Hints

- All passwords in EDconnect are case-sensitive.

- Be sure to use the same capitalization each time you type your **User Password**.

SAIG Password

EDconnect uses the **SAIG Password** (also called the **Group Password**, **TG Password**, or **Network Password**) to access your SAIG mailbox when you send or receive data.

The **SAIG Password** can be set or changed on the **Network** tab of the **Group Properties** dialog.

EDconnect has specific rules for SAIG passwords:

- Must be a minimum length of eight characters.

- Must begin with an alpha character

- Must contain at least two alpha characters of different cases (uppercase/lowercase) and at least one numeric character

- Cannot be the word "PASSWORD" (uppercase, lowercase, or mixed case)

- Cannot be the same as any of the previous five passwords

- Password will be locked out after three failures. (You must call CPS/SAIG Technical Support to have the password reset.)

- Can contain special characters

  SAIG passwords can contain special keyboard characters, such as @, #, and $, but because some computer platforms use certain special characters as command characters, we recommend avoiding % (percent), ^ (caret), & (ampersand), \ (backslash), / (forward slash), < (less than), > (greater than), and | ("pipe" symbol).

All passwords in EDconnect are case-sensitive. **SAIG Passwords** expire every 90 days.

The **SAIG Password** is tied to a destination point's **TG number** and **Connection Type** ("Production" or "Test"). While each user of EDconnect has his or her own **User Password**, there is only one **SAIG Password** per **TG number** and **Connection Type**.

You can set up more than one **Security Group** with the same **TG number** and **Connection Type**. Since these groups connect to the SAIG with the same **TG number** and **Connection Type**, they must use the same **SAIG Password**. Once the groups are established, any future **SAIG Password** changes made to one group will automatically synchronize the passwords of any other groups sharing the same **TG number** and **Connection Type**.

Helpful Hints

- Each **TG number**/**Connection Type** combination has its own **SAIG Password.**

- Each user of EDconnect has her or his own **User Password**.

- Users do not need to know the **SAIG Password** to log into EDconnect.

- As the expiration date for your SAIG password approaches, you will receive a warning that the password is about to expire when you transmit with EDconnect.

Changing Your SAIG Password

You have two options for changing your **SAIG Password**: **Local Only** and **Network and Local**.

Your **SAIG Password** is associated with your **TG number** and **Connection Type** and is stored within EDconnect and on the SAIG. Your SAIG mailbox compares the password transmitted by EDconnect with the password stored on the SAIG to confirm your group identity during each transmission.

- A **Local Only** password change sets the password within EDconnect but does not transmit the password change to your SAIG mailbox.

- A **Network and Local** password change sets the password within EDconnect *and* transmits the change to your SAIG mailbox.

If you have had your **SAIG Password** reset by CPS/SAIG Technical Support, you must:

1. Perform a **Local Only** password change, changing your **SAIG Password** to the password assigned to you (uppercase and without the quotation marks).

2. Perform a **Network and Local** password change to establish a new password on the SAIG.

If you reinstall EDconnect but have already established a **SAIG Password**, a **Local Only** password change will synchronize the password within EDconnect to match the password stored by your SAIG mailbox.

Helpful Hints

- All passwords in EDconnect are case-sensitive.

- Be sure to use the same capitalization each time you type your **User Password**.

Performing a "Local Only" SAIG Password Change

1. Open the **Security View** by selecting **New** from the **File** menu and selecting **Security View** from the list of views. You can also click the **Security View** button on EDconnect's main toolbar.

2. Right-click on the desired group within the **Security View**.

3. Select **Properties** from the pop-up menu.

4. Select the **Network** tab from the **Group Properties** dialog.

5. Type your current **SAIG Password** in the **New** text box.

   Note: If you are accessing a new SAIG mailbox for the first time, the default password is an eight-digit number comprised of the year of the DPA's birth and the last four digits of his or her Social Security Number. If you have had your password reset by CPS/SAIG Technical Support, the new password is "PASSWORD" (uppercase and without the quotation marks) or some other assigned password.

6. Type your password again in the **Verify** text box.

7. Select the **Local Only** option under **Change Type**, if not already selected.

8. Click **OK**. The message "Local TG password changed" appears.

9. Click **OK** to return to the **Security View**.

Helpful Hints

- A **Local Only** password change sets the **SAIG Password** within EDconnect without sending the password change to the SAIG.

- A **Local Only** password change is necessary after your password has been reset by CPS/SAIG Technical Support, when you move EDconnect to a different PC, or when you install EDconnect on several PCs that share one **TG number** and **Connection Type** but have separate EDconnect databases.

Performing a "Network and Local" SAIG Password Change

1. Open the **Security View** by selecting **New** from the **File** menu and selecting **Security View** from the list of views. You can also click the **Security View** button on EDconnect's main toolbar.

2. Right-click on the desired group within the **Security View**.

3. Select **Properties** from the pop-up menu.

4. Select the **Network** tab from the **Group Properties** dialog.

5. Type your new **SAIG Password** in the **New** text box.

6. Type the password again in the **Verify** text box using the same capitalization.

7. Select **Network and Local** as the **Change Type**, if not already selected.

8. Click **OK**. The message "TG Password change request added to Transmission Queue" appears.

9. Click **OK** to return to the **Security View**.

10. Select **Now** from the **Transmission** menu to send your new password to the SAIG.

Helpful Hints

- Selecting a **Network and Local** change on the **Network** tab of the **Group Properties** dialog will create a password change request in the **Transmission Queue**. EDconnect will transmit the request the next time you send or receive data.

- You need to perform a **Network and Local** password change every 90 days or your **SAIG Password** will expire.

Changing Your SAIG Password After Customer Service Resets It

1. Right-click on the desired group in the **Security View**.

2. Select **Properties** from the pop-up menu.

3. Select the **Network** tab from the **Group Properties** dialog.

4. Type your assigned password in the **New** text box.

5. Type your assigned password again in the **Verify** text box.

6. Select **Local Only** as the **Change Type**, if not already selected.

7. Click **Apply**. The message "Local TG password changed" appears.

8. Click **OK** to respond to the message. The **Group Properties** dialog will stay on your screen.

9. Type your new password in the **New** text box.

10. Type the password again in the **Verify** text box using the same capitalization.

11. Select the **Network and Local** option, if not already selected.

12. Click **OK**. The message "TG Password change request added to Transmission Queue" appears.

13. Click **OK** to return to the **Security View**.

14. Select **Now** from the **Transmission** menu to send your new password to the SAIG.

Changing Your SAIG Password After It Has Expired

Your **SAIG Password** expires every 90 days. You are warned that your **SAIG Password** is due to expire nine days before the expiration date. The expiration date and warning period are set by the SAIG network and cannot be modified.

To access the Group Properties dialog

1. Go to the **Security View**.

2. Right-click on the desired group name.

3. Select **Properties** from the pop-up menu.

4. Select the **Network** tab to check the expiration date.

If you attempt to connect to the SAIG after your password has expired, a message box appears, indicating that your password has expired. You do *not* need to have CPS/SAIG Technical Support reset your password if you receive this message. The SAIG will allow you to send and receive data as long as you transmit a password change.

To change your **SAIG Password**, click **Yes** to the message box and follow the steps on the previous page. After you enter your new **SAIG Password**, try another transmission. EDconnect will send your password change, along with any other items in the **Transmission Queue**.

Helpful Hints

- If you have had your password reset by CPS/SAIG Technical Support, the password of your SAIG mailbox will be temporarily set to "PASSWORD" or some other assigned password to enable you to transmit a password change.

- You must perform a **Local Only** password change, changing your password to "PASSWORD" or to the assigned password.

- You must then perform a **Network and Local** password change to set your **SAIG Password** to a password of your own choice.

Important Note

For enhanced security, after three failed transmissions due to an expired or invalid **SAIG Password**, your account will be locked and you must call CPS/SAIG Technical Support at 800/330-5947 to have it unlocked.

CPS/SAIG Technical Support must talk directly to the Destination Point Administrator (DPA) or Secondary Destination Point Administrator (SDPA) to verify personal identifiers before resetting your **SAIG Password** or unlocking your account. The DPA or SDPA should be prepared to supply his or her Social Security Number (SSN) and date of birth (DOB).

SAIG and User Password Change Screen Examples

Illustration of the password change screen for the **SAIG Password**:
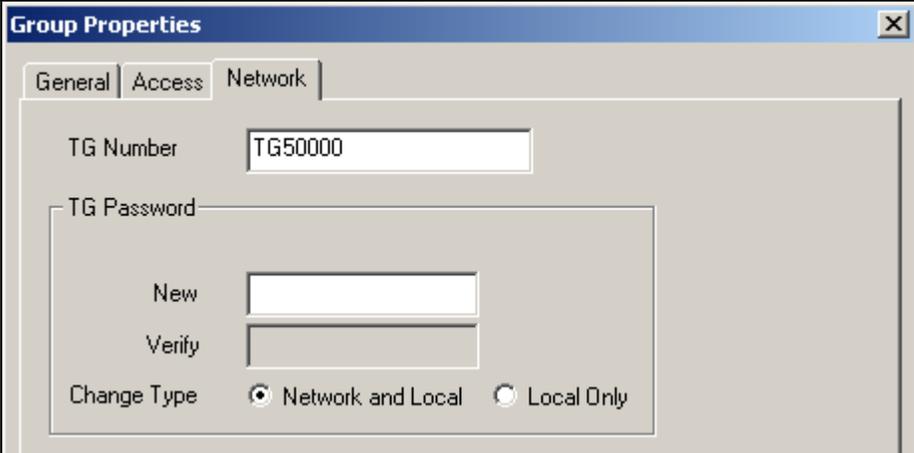
Illustration of the password change screen for the **User Password**:

Data Transmission

Sending and Receiving Data

Sending Data

You *send* data to the SAIG for processing by creating files containing data, then adding the files to the **Transmission Queue** as **Send** requests.

When EDconnect connects to your SAIG mailbox, it sends the files from your PC to the SAIG.

The appropriate Title IV Application System picks up your files, processes them, and returns the processed data to your mailbox.

Receiving Data

You *receive* data by adding requests to the **Transmission Queue**.

When EDconnect connects to your SAIG mailbox, it retrieves the processed files placed in your SAIG mailbox by a Title IV Application System and returns them to your PC.

Helpful Hint

- You can send and receive data as well as perform password changes during the same connection to the SAIG.

Data Transmission Menu

The **Transmission** menu on the main menu bar gives you three choices: **Now**, **Later**, and **Test**.

- Selecting the **Now** option starts a connection to the SAIG immediately. All data queued for sending to the SAIG and properly marked in the **Transmission Queue** are sent. All data queued for receiving from your mailbox and properly marked in the **Transmission Queue** are received, provided there are data files in your mailbox.

- Selecting the **Later** option opens the **Transmission** dialog box that enables you to select a time and date for EDconnect to connect to the SAIG.

- Selecting the **Test** option transmits a test file to the SAIG, then sends a request for the same file. EDconnect creates the test file, so you do not need to add it to the **Transmission Queue** before you perform the transmission test. The **Test** option will also send a **SAIG Password** change if you have one in your EDconnect **Transmission Queue**.

Helpful Hint

- If you set up a later transmission, EDconnect must remain open until the time you select for the later transmission arrives. A message box tracks the time remaining until EDconnect transmits your data.

Transmission Queue (TQ)

The **Transmission Queue** (**TQ**) is a list of pending requests to send or receive data and/or to make a password change.

Requests remain in the **TQ** until EDconnect processes them during a transmission or until you remove them from the **TQ**.

- You can open the **TQ** by selecting **New** from the **File** menu and choosing **Transmission Queue** from the list of views.

- You can also click the **Transmission Queue** button on EDconnect's main toolbar.

To add records manually to the TQ

1. Move the cursor to the first blank line in the **TQ**.

2. Complete each field either by typing your selection or by clicking the **down** arrow to display a menu of choices.

3. Complete the rest of the fields for the same row. EDconnect does not let you move to a new row until you have completed all the necessary fields for the current row.

4. You will know that a line is complete when the pencil symbol on the far left of the row disappears. The record is then ready for transmission.

Below is an example of the pop-up dialog that appears when you select the **down** arrow in the **File Name** field.

- This step is usually the final step in preparing a record in the **TQ**.

- The **Data File** dialog that appears enables you to select the specific file that you want to send.

Description	Message Class	File Name
04-05 COMMON RECORD DOCUMENTS	CRAA05IN	c:\iam\data\craa05in.*

Data File	? X
Look in: 🗀 DATA	▼ ← 🔄 📂 ▦ ▾

📄 CRAA05IN.001 📄 CRAA05IN.DAT
📄 CRAA05IN.002
📄 CRAA05IN.003

Helpful Hints

- If you know the message class of a file you want to receive, typing the message class will fill in all necessary fields automatically.

- If you want to receive all data and messages, go to the **Description** column and select "All Data, All Messages" from the list. This action will fill in all necessary fields automatically.

TQ Templates

Creating TQ Templates

The **Transmission Queue** (**TQ**) is a list of pending requests to send or receive data or to make password changes.

Records remain in the **TQ** until EDconnect processes them during a transmission, or until you remove them from the **TQ**.

You can save a current view of the **TQ** and make that into a template file (**TQT**) that can be loaded back into the **TQ** later.

To create a template, follow these instructions

1. Create a group of records in the **TQ** that you plan to use repeatedly in the future.

2. Select **Save As…** from the **File** menu.

3. Choose a location to save the file and give it a name you will remember. As part of the file name, be sure to include the extension ".tqt" when naming the template file.

4. Click **OK**.

Helpful Hints

- Templates are "snapshots" of a current view saved to a file.

- Templates can be especially useful for common tasks.

- Instead of manually creating the same records each time, you can load a template with the records already created.

Opening TQ Templates

You can retrieve saved "snapshots" of a **Transmission Queue** (**TQ**) view by opening **Transmission Queue Template** (**TQT**) files using one of the following methods:

1. Select **Open** from the **File** menu within EDconnect and select the name of the **TQT** file.

2. Find the **TQT** file using **Windows Explorer** and double-click it. Double-clicking the **TQT** file will open EDconnect and display the desired **TQ** contents.

3. Use your mouse to drag the **TQT** file from **Windows Explorer** to an open **TQ**.

4. Select a template from the **Programs** menu. There are pre-created templates in the EDconnect folder on the **Programs** menu. Selecting a template will open EDconnect.

Helpful Hints

- EDconnect automatically places several common **TQT** files in the EDconnect directory during installation.

- You cannot import **TQT** files associated with earlier versions of EDconnect into EDconnect 7.2.

Activity Log

The **Activity Log** stores a record of all transmissions made using EDconnect.

It lists files that have been sent and received, **SAIG Password** changes that have been transmitted, and any transmission errors that occurred while sending or receiving files.

You can open the **Activity Log** by selecting **New** from the **File** menu and selecting **Activity Log** from the list of views.

Archiving Activity Log Records

1. Open the **Activity Log**.
2. Select the records you want to archive.
3. Select **Save As…** from the **File** menu.
4. Name the file, preserving the ".arc" extension.
5. Select the drive and directory where you want to save the file.
6. Click **Save**.

Helpful Hints

- You can select records easily using the **Activity Log Filter**.
- Archiving records from the **Activity Log** does not automatically delete those records.
- To delete records, return to the open **Activity Log** and highlight the records you archived. If you filtered the records, highlight all the records in that view. Press **Delete**.
- You can import records archived with EDconnect 6.X into EDconnect 7.2, but not records archived with earlier versions of EDconnect.

Retention Period

The **Retention Period** dialog box enables you to set the length of time that EDconnect retains records in the **Activity Log** before automatically deleting them.

To set the retention period

1. Choose **Properties** from the **Edit** menu while the **Activity Log** is active on your screen.

2. Select the **Archive** tab on the **Properties** dialog.

3. Click **Enable Automatic Delete** to activate the delete function.

4. Drag the vertical bar in the middle of the **Retention** field to set the number of days (the default is zero days).

5. Click **OK**.

Helpful Hints

- You can use your left and right **Arrow** keys to fine tune your selection.

- Pressing the **left Arrow** key **lowers** the **Retention Period** by one day and pressing the **right Arrow** key **increases** it by one day.

Mailbox Query

View Records in my Mailbox

You can use the **Mailbox Query** to get a "snapshot" of the current contents of your SAIG mailbox. After performing a **Mailbox Query**, you can place requests for specific files in your **Transmission Queue**.

To use the Mailbox Query

1. With no records selected for transmission or receipt in your **Transmission Queue**, select **Now** from the **Transmission** menu to connect to the SAIG.

2. After the transmission completes, open the **Mailbox Query** by selecting **New** from the **File** menu and selecting **Mailbox Query** from the list of views. You can also click the **Mailbox Query** button on EDconnect's main toolbar.

3. Select the items you want to receive in the next transmission by putting a checkmark in the **Move to TQ** column.

4. Close the **Mailbox Query** by selecting **Close** from the **File** menu. This places a request in the **Transmission Queue** for each file that you selected.

Helpful Hints

- At the end of each transmission, EDconnect updates the **Mailbox Query** to reflect what is currently in your SAIG mailbox.

- If you receive all the data in your mailbox, the **Mailbox Query** will be empty because your mailbox is empty.

- To get a "snapshot" of the current contents of your SAIG mailbox, follow the steps above to perform a new **Mailbox Query**.

Received File View

The **Received File View** lists the files that you have recently downloaded.

This view displays files that you have downloaded from your SAIG mailbox over the previous ten days.

You can download files listed in the **Received File View** without having the files restored by CPS/SAIG Technical Support.

To re-download files

1. Open the **Received File View** by selecting **New** from the **File** menu and selecting **Received File View** from the list of views.

2. Place a checkmark in the **Move to TQ** checkbox to the left of the batch you want to restore.

3. Close or save the **Received File View**. Once the **Received File View** is closed or saved, each record that you selected is added to the **Transmission Queue**.

4. Select **Now** from the **Transmission** menu to receive the selected files again.

Helpful Hints

*   If a file has been restored to your mailbox by CPS/SAIG Technical Support, the **Restored Date** field will be populated with the date the file was put back in the Archive.

*   The date listed in the **Add Date** column of the **Received File View** represents the date a given item was placed in your SAIG mailbox by the Application System that processed that item.

*   To restore files older than ten days to your SAIG mailbox, use the **TransactionDelivery CommunityManager** (**TDCM**) **Archive View** or contact CPS/SAIG Technical Support at 800/330-5947. The **TDCM** is available online at **saigportal.ed.gov**.

*   CPS/SAIG Technical Support can restore any file to your mailbox if it is not older than 180 days. Files older than 180 days are archived and cannot be restored.

Views

The table below lists all the views within EDconnect that play a role in data transmission.

The middle column displays the toolbar button for each view (clicking a view's toolbar button opens that view).

View	Toolbar Button	Description
Transmission Queue (TQ)		Lists pending **Send** and **Receive** requests, which remain in the **TQ** until processed or until you remove them.
Activity Log		Lists processed requests to send and receive data from the SAIG.
Message Class Manager		Lists all the message classes by project that are available to send and receive.
Mailbox Query		Lists the data, by message class, available in your SAIG mailbox.
Received File		Lists data records, by message class, that you have already received from your SAIG mailbox during the last ten days.
Security		Lists **Security Groups** and **User IDs** and controls access to EDconnect and the SAIG.

Miscellaneous

Sorting Records

The sort function enables you to organize records within a particular view.

To sort records in a view

1. Select **Sort** from the **Tools** menu.

2. Click the **down** arrow to the right of the text box to display a list of all the fields upon which you can perform a sort within a particular view.

3. Highlight the **sort** preference.

4. Click **OK**.

Helpful Hints

- You can also sort records based on a particular field by double-clicking the column header for that field.

- The records in that field sort in ascending order after the first double-click.

- Double-click again on the same column header to reverse the order.

Filtering Records

Using the **Filter** option, you can filter out records of a particular type in a view so that you only see certain records.

You can filter records in the **Activity Log**, **Message Class Manager**, **Received File View**, **Mailbox Query**, and **Transmission Queue**.

To filter records

1. Select **Filter** from the **Tools** menu.

2. Click on the field you want to use as the filter criteria.

3. Enter the field contents you want to use to filter the records.

4. Click **OK**.

Helpful Hints

*   You can filter on several criteria at once.

*   To get the entire view back, open the **Filter** dialog box and click **OK** without entering information in any of the fields.

Changing File Paths

Follow these steps to change the file paths for data you send and receive:

1. Open the **Security View** by selecting **New** from the **File** menu and selecting **Security View** from the list of views. You can also click the **Security View** button on EDconnect's main toolbar.

2. Right-click on your **User ID** in the **Security View** and select **Properties** from the pop-up menu, or highlight your **User ID** and select **Properties** from the **Edit** menu.

3. Select the **Directories** tab of the **User Properties** dialog.

4. Click the **down** arrow on the right side of the selection box (the field at the top of the **Directories** tab).

5. Select **Send** or **Receive** from the list, depending on which directory you want to change.

6. Enter the path and folder in the next field. If you do not know the path, click **Browse** to select the path and folder.

7. If you would like all users within a **Security Group** to use the same file paths, place a checkmark in the box labeled "Set all users of this group to the specified directories." Create all users in the group first.

8. Click **OK** to save the directory settings.

9. Log out of EDconnect and log back in before performing your next transmission.

Helpful Hints

- There are three ways to set file paths:

    – On the **Directories** tab of the **User Properties** dialog.

    – In the **Message Class Manager**.

    – In the **Transmission Queue**.

- If you accept the default values during installation, EDconnect sets the default path for all files to "C:\IAM\DATA" but leaves the file path blank on the **Directories** tab of the **User Properties** dialog. If this field is blank, paths entered into the **Transmission Queue** or **Message Class Manager** take precedence over the default "C:\IAM\DATA" path.

- During a transmission, EDconnect checks the **TQ** to see if you have specified paths for particular files. If you have not specified paths, EDconnect defaults to the paths defined in the **Message Class Manager**. If the **Message Class Manager** does not contain path information, EDconnect uses the default path established on the **Directories** tab of the **User Properties** dialog, if it exists.

- If, on the other hand, you specify a default path during setup, such as "D:\IAM\DATA," EDconnect will ignore changes made to file paths in the **Message Class Manager**. Only changes made in the **TQ** will override the default path ("D:\IAM\DATA," in this example) established on the **Directories** tab of the **User Properties** dialog.

- Before you can assign the path to a folder through the **Security View**, the folder must exist. Otherwise, you will get a "Directory does not exist" error message.

Getting Help

Online Help

There are several ways to access help.

To access Online Help within EDconnect

1. Select **Help Topics** from the **Help** menu.
2. Click on **Help,** which is available on many dialog boxes and windows.
3. Click into a field and press **F1**.

To access the Online Help Index

1. Click the **Index** tab on EDconnect's Help system.
2. Start typing the name of a topic in which you are interested.
3. Look for the topic in the selection box.
4. Highlight the desired topic.
5. Click **Display**.

Note: The Index can help you find topics related to a similar subject or function.

Helpful Hints

- Be sure to expand the Help Contents books. Each book contains several individual Help topics.
- Check the **How Do I?** topics for frequently performed operations (select **How Do I?** from the Help menu).
- Watch for links to other topics.
- You can print topics by selecting **Print** from the **Options** menu on the Help screen.
- Use the **Find** tab on the Help screen to locate specific words or phrases anywhere within the Help text.

Note: You can also use the Help system **Options** menu to change the size of the font, keep a Help topic on top of other dialogs so it remains visible, create a note to be kept with a Help topic, or copy text from a Help topic.

CPS/SAIG Technical Support

- Telephone: 800/330-5947 (no cost per call)
- TDD/TTY: 800/511-5806
- E-mail: **CPSSAIG@ed.gov**
- Fax: 319/358-4260
- Working hours are 7 a.m.–7 p.m. (CT) Monday through Friday.

Frequently Asked Questions

Why do I receive a "Password expired" message when I transmit after changing my password?

In EDconnect, you need to be aware of the expiration date of both your **User Password** and your **SAIG Password**.

To avoid confusion, we suggest the following:

- Set your **User Password Expiration Period** to 90 days. This will match the duration of the **SAIG Password**. You can set your **User Password Expiration Period** on the **General** tab of the **Group Properties** dialog. Right-click on the name of your group, then type "90" for your expiration period on the first tab.

- Be sure to change both passwords on the same day. First, change your **User Password** within your **User Properties** dialog, then enter a **SAIG Password** change within your **Group Properties** and connect to the SAIG.

- When you receive a warning that your password is about to expire, simply enter a new password for both your **User ID** and for your **SAIG Password**.

How do I import files?

Follow these steps to import files into EDconnect:

1. Select **Import** from the **File** menu.

2. On the **Import** dialog, choose the **File Type** of the file you will be importing. This can be either a **Message Class File** or a **Transmission Queue File**.

3. Click the **Browse** button to select a file to import.

4. Click **OK**.

Helpful Hints

- The **Import** function can be especially useful if you have several PCs using the same **TG number**.

- Once you have downloaded the message class file on one PC, you can copy the file to a diskette and import it into the **Message Class Manager** on the other PCs using the **Import** dialog.

How do I print PMessages?

The U.S. Department of Education (ED) periodically sends out PMessages that automatically appear on your screen when you connect to the SAIG.

You can print a PMessage by selecting **Print** from the **File** menu while the PMessage is on your screen.

EDconnect also saves these messages on your PC for future reference. Follow these instructions to print a PMessage later:

1. Close all open views.

2. Select **Open** from the **File** menu.

3. Use the **Open** dialog to select the directory in which your PMessages are stored.

4. Choose the PMessage you want to print and click **OK**.

5. Select **Print** from the **File** menu, or the **Print** button from the toolbar.

6. Click **OK**.

What files do I need to move when changing PCs?

After installing EDconnect on a new computer, be sure to copy the **EDconn7.mdb** file from the EDconnect folder on your old PC to the folder of the same name on your new PC.

If you are uncertain about the location of **EDconn7.mdb**, EDconnect displays the path to the database at the bottom right of the EDconnect screen.

You should also move any folders that contain files you have sent or received, maintaining the same file paths, if possible. On a stand-alone PC, this is often C:\IAM\DATA.

Why am I getting an "Invalid Value" error message?

In most cases, the "Invalid Value" error message occurs because the **File Name** field in the **Transmission Queue** is not completed, or because the **File Name** field contains an invalid file path.

If you receive this error, go to the **File Name** field on the incomplete record and supply a valid path and file name.

In some cases, EDconnect will prompt you for the missing value.

How do I combine files?

The **Combine** feature permits you to combine all files of the same message class into one file, if more than one is downloaded during a given transmission.

To combine files, go to **File, New, Message Class Manager View**. Within the **Message Class Manager**, place a check in the box located under the **Combine** column for each message class you wish to combine.

Warning

- In order to maintain batch integrity, if you try to combine message classes that should not typically be combined, you will receive a warning message. The **Combine** feature should not be used, in particular, to combine files sent to you by the Common Origination and Disbursement (COD) System.

Why am I getting an error notification that I cannot send a file?

Prior to transmitting a batch to the SAIG, EDconnect checks the first 8 bytes of the file for the text "O*N05."

If EDconnect detects an O*N05 header in the first 8 bytes of the first record of a file, you will receive a pop-up error message that EDconnect has detected the presence of a transmission header record and the transmission will not proceed.

You must remove transmission headers and trailers from any files you attempt to send to SAIG.