EDconnect 8.6.1 Installation & User Guide

Version 2.6

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DOCUMENT INFORMATION

Title:	EDconnect 8.6.1 Installation and User Guide
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DOCUMENT HISTORY

Version Number	Date	Summary of Change
1.0	03/05/2012	Created for EDconnect 8.1 release
1.1	09/11/2012	Updated for 8.2 release
1.2	10/30/2012	Updated for 8.3 release
1.3	02/21/2013	Updated to include instructions on how to access the SAIG test environment.
1.4	05/08/2014	Updated FSA logo throughout document and included scenarios that could trigger a 533 error for EDconnect users.
1.5	05/20/2014	Finalized changes to document.
1.6	09/28/2014	Updated document to include the availability of EDconnect 8.4 (to support IPv6 traffic), and updates to existing and new EDconnect error codes.
1.7	10/20/2014	Conducted 2020 Team internal document review and applied edits as needed.
1.8	10/29/2014	Finalized changes to document.
1.9	12/08/2014	Added updates to the note regarding the EDconnect IPv6 release.
2.0	02/05/2015	Accepted changes, applied 508 accessibility updates, and finalized for posting on 03/06/2015
2.1	01/04/2016	Updated document to reflect that EDconnect now supports Windows Server 2008 and 2012. Updates were made to remove "www" from TDCM and FSA download URLs. Updates were made to change EDconnect version to 8.5.
2.2	01/20/2016	Finalized edits made to document.
2.3	04/28/2021	Applied updates for EDconnect 8.5 upgrade. - EDconnect 8.5 software will not run-on Windows 7, 8, Vista, Windows Server 2003, and 2008. EDconnect 8.5 must be used with the Windows 10+ or Windows Server 2012+.
2.4	08/18/2021	FSA approved updates and document was finalized.
2.5	11/03/2023	Applied updates for EDconnect 8.6.0 upgrade. - EDconnect 8.6.0 software supports accessing Federal Tax Information (FTI) mailboxes to receive Institutional Student Information Record (ISIR) files with FTI data, while maintaining backward compatibility with TG mailboxes.
2.6	02/13/2024	Corrected screenshots for certificate import and validation; updated password requirements to resolve inconsistency; Updated EDconnect version to 8.6.1. - Opening all.tqt does not add entry to the transmission queue - Attempting to receive "All" data in all projects with a TG account results in transmission of no data. - The network has been correctly set for the switch from an FT# to a TG#, the network was incorrectly set. - The Database error dialog which is displayed on first login as TG# after initially logging in as FT# has been resolved. "Password not changed in tdclient.ini file" issue is fixed.

Contents

1. Student Aid Internet Gateway (SAIG) System Overview

Through the SAIG, you can send, receive, and manage Federal student aid information electronically. By linking your computer to the resources of various Title IV Application System databases and processing services, the SAIG helps you manage Title IV Federal Student Aid (FSA) information efficiently.

In December 2019, Congress passed the Fostering Undergraduate Talent by Unlocking Resources for Education Act (FUTURE Act), which amends Section 6103 of the Internal Revenue Code (IRC) to allow the Internal Revenue Service (IRS) to disclose certain Federal Tax Information (FTI) to FSA. The FTI-SAIG system is used specifically to transmit Institutional Student Information Record (ISIR) files containing sensitive FTI data. FTI-SAIG users have the ability to send and receive files while maintaining complete compliance with IRS Publication 1075 requirements regarding the transfer and storage of FTI data.

- ◆ **TDNgine (TDN) —** TDN is a bTrade Commercial-off-the-shelf (COTS) product that is the "engine" of the SAIG application. This application is used as the mailbox application for sending, storing, retrieving, and archiving data. TDN resides on FSA's servers located at the Next Generation Data Center (NGDC).
- ◆ **TDClient —** TDClient is a client-side bTrade COTS product used to send and receive data securely over the Internet. This software is command-line based and **does not have** a user interface. TDClient resides on the **end user's** computer or server.
- ◆ **TDCommunity Manager (TDCM) —** TDCM, also known as SAIG Portal, is a web-based bTrade COTS product that allows users to manage their mailboxes and to view data transmissions history to and from mailboxes. This product does not send or receive data.
- ◆ **FTI-TDCommunity Manager (FTI-TDCM) —** FTI-TDCM, also known as FTI-SAIG Portal, is a web-based bTrade COTS product that allows users to manage their mailboxes and to view data transmissions history to and from mailboxes. This product does not send or receive data.
- ◆ **EDconnect —** EDconnect is a custom client-side software product used to send and receive data transmissions securely over the Internet. This software presents a graphical user interface for users to send and receive data. EDconnect is coded in the C++ language and utilizes the TDClient Windows Application Programming Interface (API). The software is installed on the client's standalone PC or in a workstation/network server environment.

Using software provided for the SAIG/FTI-SAIG, you collect data on your personal computer (PC) or computer system and transmit the collected data in batches over the SAIG/FTI-SAIG. The appropriate Title IV Application System receives the data, processes the data, performs any required database cross-referencing, and returns the processed data to your mailbox. In addition to providing a summary of the services

available through the SAIG/FTI-SAIG, this guide gives detailed instructions on the installation of EDconnect.

A Help component is available within the EDconnect software. To see a list of available topics, select Help Topics from the EDconnect Help menu. Both the installation guide and EDconnect online Help are designed to address the needs of non-technical users, although a working knowledge of Windows and the ability to perform basic PC operations are assumed.
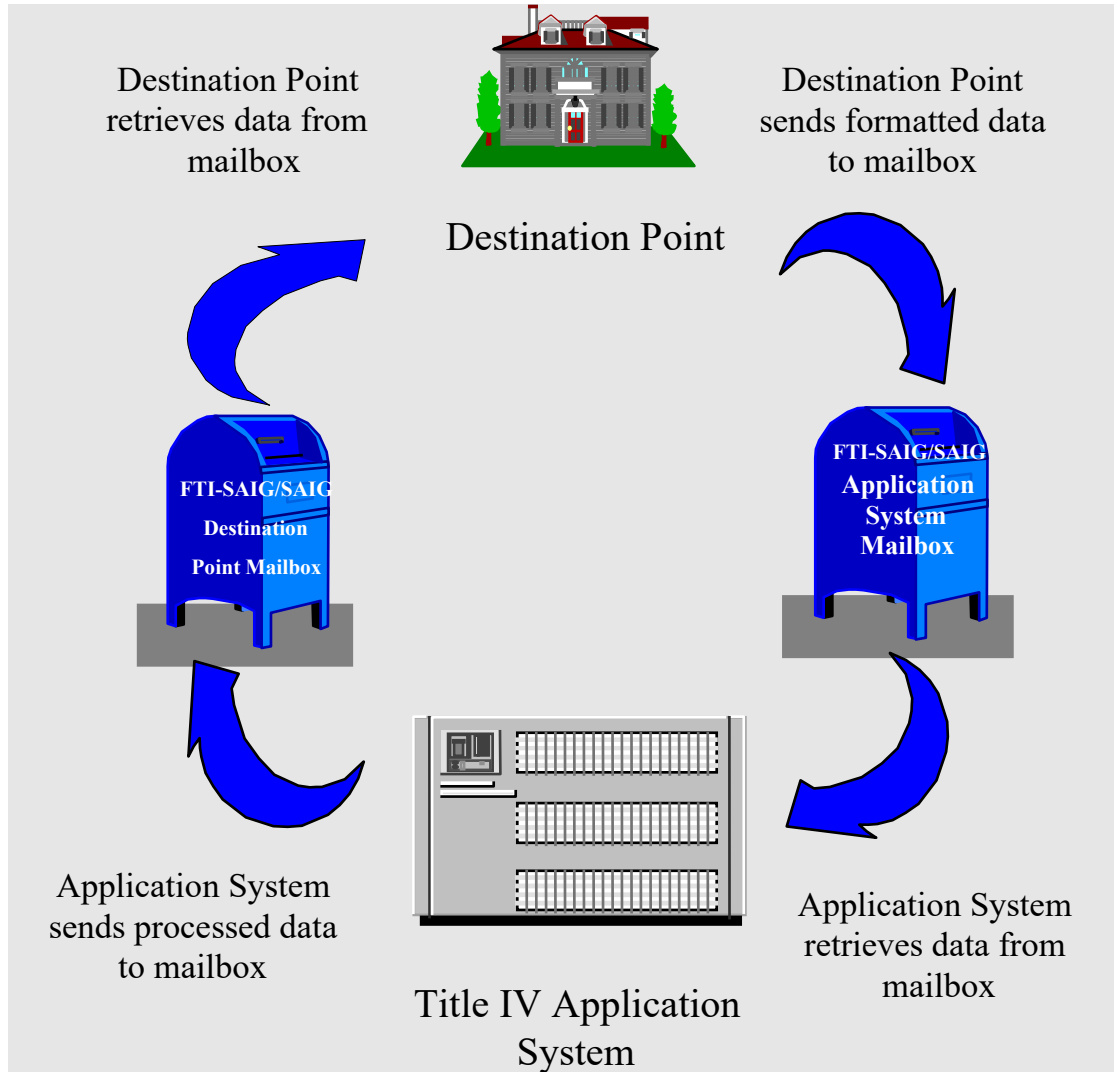
By enrolling in the SAIG/FTI-SAIG, you have become a "destination point." FSA provides the EDconnect software to make it possible for you to send and receive data through the SAIG/FTI-SAIG. In addition, FSA makes other programs and documentation available for additional Title IV Application Systems in which you may have enrolled.

The EDconnect 8.6.1 upgrade permits retrieval of Federal Tax Information (FTI) data from you FTI-SAIG mailbox if you have one; existing functionality to SAIG mailboxes is unchanged.

Note: *SAIG/FTI-SAIG term is used throughout the guide and refers to both systems, it is important to keep in mind that FTI-SAIG and SAIG are NOT the same system.*

1.1 Store and Forward Data Transmissions

Once enrolled through the Participation Enrollment (PM) system, a Destination Point is assigned a SAIG electronic mailbox. Using the EDconnect client-side software, destination points can transmit data with Title IV Application Systems securely over the Internet to/from their assigned electronic mailbox. The figure below illustrates the data flow between a destination point and Title IV Application System using electronic SAIG mailboxes:

Destination Point retrieves data from mailbox

Destination Point

Destination Point sends formatted data to mailbox

FTI-SAIG/SAIG Destination Point Mailbox

FTI-SAIG/SAIG Application System Mailbox

Application System sends processed data to mailbox

Application System retrieves data from mailbox

Title IV Application System

1.2 Destination Point Administration

A Destination Point Administrator (DPA) is an individual representing an organization involved in the administration of Title IV student financial aid programs (such as a postsecondary institution, FFELP lender, FFELP guaranty agency or third-party servicer) that is enrolled in the SAIG/FTI-SAIG and assigned a Destination Point (TG/FT number/mailbox). The administrator is responsible for the security of data obtained through the SAIG/FTI-SAIG. The administrator controls access to the SAIG/FTI-SAIG through a particular destination point by setting the levels of access to EDconnect and the SAIG/FTI-SAIG for each user. The administrator also maintains SAIG/FTI-SAIG User Statements (see Appendix A) for all users of the SAIG/FTI-SAIG at a particular destination point.

1.2.1 <u>For Security Groups</u>

Security Groups share a common TG (for non-FTI users) or FT (for FTI users) number, a common Connection Type ("Production" or "Test" for TG numbers, "FTI" for FT numbers), a common SAIG/FTI-SAIG password, common access to EDconnect features, and common access to the SAIG/FTI-SAIG.

Security Groups can be especially useful for institutions that have separate FT/TG numbers for services such as COD (Pell and/or Direct Loan), CPS, and NSLDS. You can also create more than one Security Group for the same FT/TG number. Changing the password for one Security Group changes the password for all other Security Groups accessing the same FT/TG number and using the same Connection Type.

When a user within a Security Group connects to the SAIG/FTI-SAIG, the user connects with the FT/TG number and SAIG/FTI-SAIG password for that group. The individual user's name will appear in the Activity Log for each Send or Receive record.

The Destination Point Administrator is responsible for controlling the varying levels of access among the Security Groups set up in EDconnect by managing SAIG/FTI-SAIG passwords, SAIG/FTI-SAIG access, and SAIG/FTI-SAIG connections at the group level.

1.2.2 <u>For Users</u>

Users represent individuals within Security Groups sharing common access to EDconnect and the SAIG/FTI-SAIG. The Destination Point Administrator is responsible for controlling each user's level of access to EDconnect and the SAIG/FTI-SAIG at the group level. User IDs are issued by FSA.

When a user connects to the SAIG/FTI-SAIG and sends or receives data, the user's name will appear in any Send or Receive record in the User Name column of the Activity Log. Startup options, color preferences, and file folder locations are established at the user level. User passwords are issued by FSA.

1.3   SAIG/FTI-SAIG User Statement

A copy of the SAIG/FTI-SAIG User Statement is shown in Appendix A. This statement may be copied. The Destination Point Administrator should have signed copies of this statement on file for each EDconnect user.

2. Installing EDconnect

This section contains detailed instructions for downloading and installing EDconnect. Instructions are provided for both stand-alone and network installations.

The latest EDconnect 8.6.1 software is compatible with both IPv4 and IPv6 connections. If a user is unaware as to whether they have access to an IPv6 connection, we recommend contacting your IT department who will be able to provide this information.

EDconnect 8.6.1 is available for SAIG/FTI-SAIG users to download from the FSA Knowledge Center website (https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools/edconnect).

2.1   Hardware and Software Requirements

EDconnect 8.6.1 requires a connection to the Internet. You must have a connection to the Internet. Please contact your IT department if you are unsure how to connect to the internet. This connection must be active (i.e., you must be connected to the Internet) to use EDconnect.

To comply with ED requirements, your personal computer must meet or exceed the following minimum configuration:

- IBM or fully IBM-compatible PC with a 1.2 GHz processor.
- 512 MB RAM memory.
- 60 GB hard drive.
- Windows compatible keyboard and mouse.
- SVGA graphics adapter capable of 800 X 600 screen resolution or higher.
- 56 kbps analog using V.90 and Internet connection.
- Windows 10 or higher, or Windows Server 2012 or higher.

2.1.1 Estimating Hard Disk Space Needs

The software takes up the following space on your hard disk:

Product	Size
EDconnect	15 MB
EDExpress	16 MB
SSCR with 300 records	6 MB

Each set of 5,000 records requires the following space:

Record	Size
Direct Loan	49 MB
ISIR	16 MB
NSLDS	7 MB
Packaging	3 MB

2.1.2 Supported Operating Systems

EDconnect can be used as stand-alone or as multi-user software and can be installed on the following Operating Systems:

- ◆ Windows 10 or higher

In multi-user mode, the EDconnect database (edconn.mdb) can also reside on the following supported network operating systems:

- ◆ Windows Server 2012 or higher

2.2   Important Installation Notes

Before you start the installation, be sure to close all Windows applications, including screensavers, e-mail notification programs, and antivirus software.

Installing EDconnect creates default folders and subfolders to manage the transfer of files between different Title IV financial aid software packages and to simplify file management. ED recommends that you use these default folders.

You must be an Administrator on your workstation to install EDconnect 8.6.1. If you are not an Administrator, you will receive a warning when you try to install EDconnect. There are no workarounds for these Windows rights issues. Please consult with your organization's technical department if you receive a warning that an Administrator must install the EDconnect software.

2.3 Downloading Software/Paper Documentation

You can download both software and paper documentation from the FSA Knowledge Center website (https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools/edconnect). The amount of time it takes to download a file depends on the file size and the speed of your Internet connection.

Some organizations block their employees from downloading programs from Internet sites. If you have problems downloading from the FSA Knowledge Center website, try again later. If you continue to experience problems, contact your technical support staff to ensure that you have full download rights.

Electronic documentation is available to view/download from the Internet in Adobe PDF format. The following types of paper documentation are available for you to download:

- ◆ Installation and User Guides

Each link to the above electronic document is accompanied by a description that includes the date the document was posted and the size of the file.

1. Type the FSA Knowledge Center Web address, https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools/edconnect, into the address box at the top of your browser window.

2. Click on the "EDconnect 8.6.1" link to access the EDconnect software and document links.

3. Click on the link for "Subject: EDconnect Installation and User Guide" to access the applicable page containing the documentation links.

4. Click on the "EDconnect Installation and User Guide" link.

5. A PDF version of the document shall display in your browser to view or download.

2.3.1 Downloading the Software

The installation package for EDconnect 8.6.1 is available on the FSA Knowledge Center website. Follow the steps below to download the EDconnect 8.6.1 software:

1. Type the FSA Knowledge Center web address, https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools/edconnect, into the address box at the top of your browser window.

2. Click the link for "**EDconnect 8.6.1**" under "By Version Number

3. Click the link to the left of "**Subject: EDconnect Download for Windows**".

4. Next, click "**EDconnect Download for Windows**" to download the file to your PC's default location or, right click and select "**Save link as…**" to save to another location on your hard drive. The Windows Desktop is a convenient place to save the file and locate it later. Click the Save button. The length of time it will take the file to download depends on the speed of your Internet connection. See the table of download times in this section.

Note:

- ◆ It is recommended that SAIG/FTI-SAIG users download the installation file to a folder other than the one in which you will install EDconnect. For example, users may create a folder called "FSA SAIG Downloads," specifically for the installation files you download from the FSA Knowledge Center.
- ◆ Once you have downloaded the installation file to your hard drive, go to the folder containing the EDconnect860.exe file and double-click it to start the installation. Go to the *Installing EDconnect* section of this guide for further instructions.

- ◆ Downloading the software does *not* install it.

- ◆ You should have *no* other programs running while you are installing EDconnect.

2.4 Installing EDconnect

Follow the steps below to install EDconnect 8.6.1.

1. Close any programs that are running, including antivirus software.

2. Locate the **EDconnect861.exe** download file and double-click on it to start the installation.

   Note: You may receive the following User Account Control prompt. **Click Yes to proceed.**
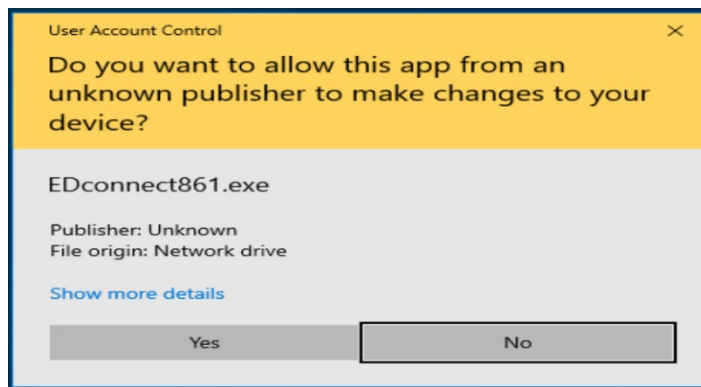
Users may see a notification that the Microsoft C++ 2013 and/or 2015 redistributable package(s) are pending install.
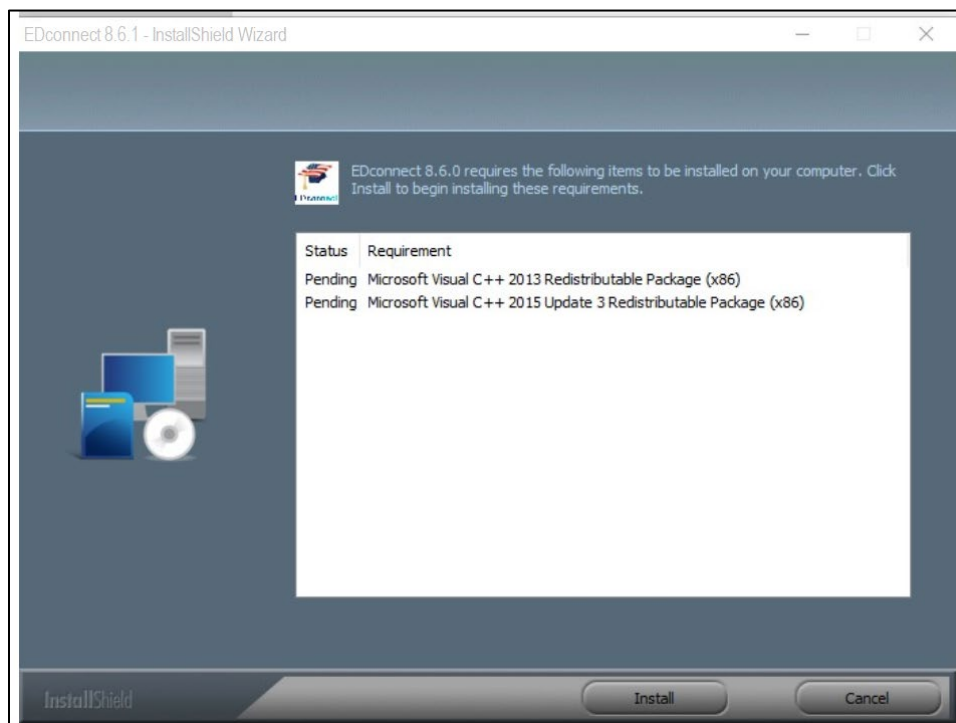
If you already have the redistributable installed, you will not see this notification, but if you see it, click Install.

Once the redistributable is installed, the EDconnect installation process begins, and a splash screen briefly appears:

The splash screen will automatically close, and a **"Preparing Setup"** screen will be shown briefly. After a few seconds, the Welcome screen appears.
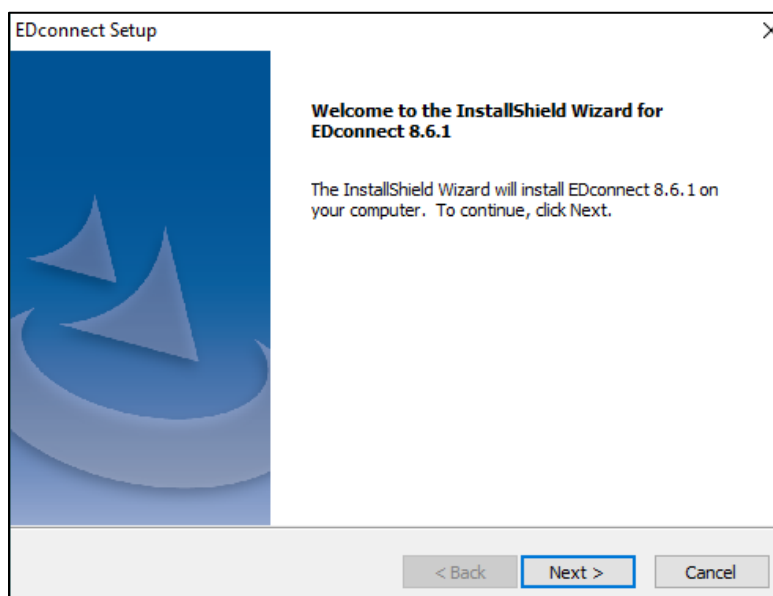
3. Select the **Next** button and the **Installation Type** dialog box will open.
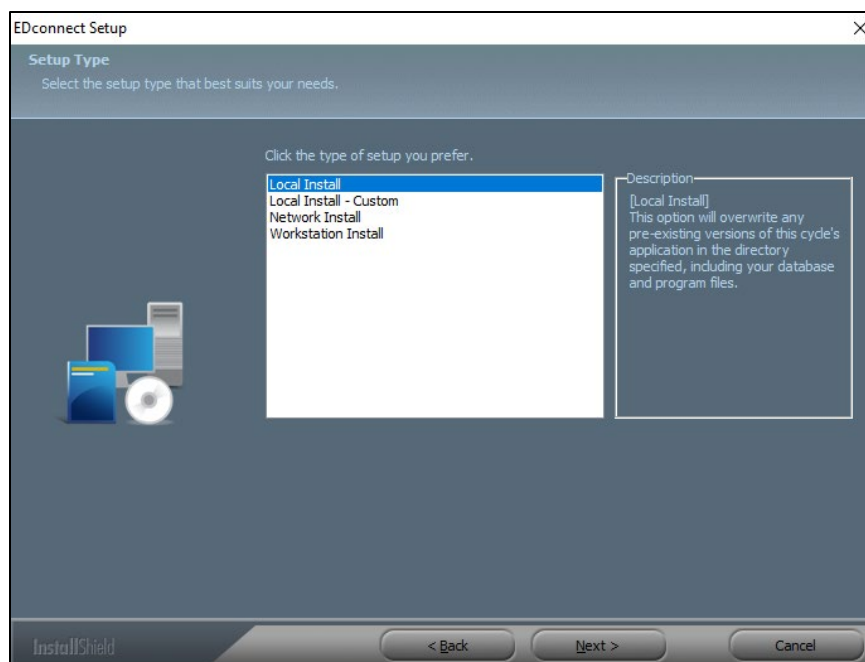
4. User will be prompted to select the type of installation: **Local Install**, **Local Install - Custom**, **Network Install**, or **Workstation Install**.

    Note: To view a description of the installation types, click on an option to highlight and the description will display at the bottom of the dialog box.

    Please read the explanation of each installation type option below:

    ◆ Select **Local Install** if you are installing EDconnect, including the EDconnect database, on a single PC for the first time. By selecting Local Install, you will install all EDconnect components, including the database, to your local hard drive.

      Note: The EDconnect software defaults to Local Install when prompted to select an install option.

    ◆ ***If you already have an EDconnect database on your local hard drive***. select **Local Install - Custom**. By selecting Local Install - Custom, you will install ***all*** EDconnect components ***except*** the database to your local hard drive.

    ◆ Select **Network Instal**l if you do not have an existing EDconnect database in a network location and want multiple PCs to have common access to a single EDconnect database. Performing a Network Install places the EDconnect database (EDconn8.mdb) on your Local Area Network (LAN). The EDconnect database contains the information users will share, such as the Activity Log and Security View information.

      Note: A Network Install does not install the program itself. After a Network Install, you must perform a Workstation Install on each PC to install the program files. Record the location of the EDconnect database when

performing a Network Install. You will need this information when performing the Workstation Install.

◆ Select **Workstation Install** if you already have an EDconnect database on your network. Perform a **Workstation Install** on each PC that you want to access the EDconnect database.

Note: You must perform a Network Install before performing a Workstation Install if the EDconn8.mdb database is not already on your network. The Workstation Install checks for a valid EDconnect database in the selected network location before proceeding.

5. Select the type of installation by clicking once on the option and then on the **Next** button. The **Destination Folder** dialog box will appear on your screen. Depending on your operating system, the default destination folder is **C:\Program Files (x86)\EDconnect8** for a local installation. Make note of where the destination folder is.

Note: For a network installation, you will need to select the appropriate LAN drive as the database location. You can accept the default folder or change the destination folder by using the Browse button.
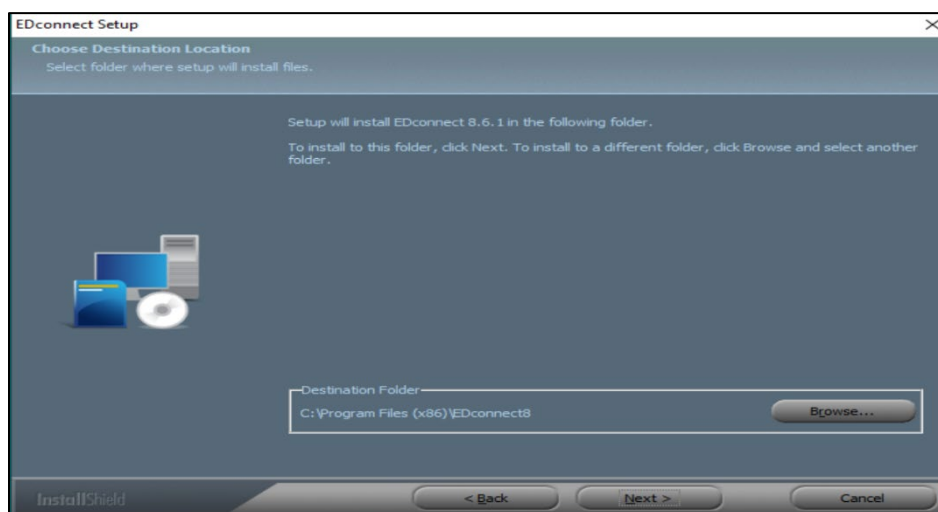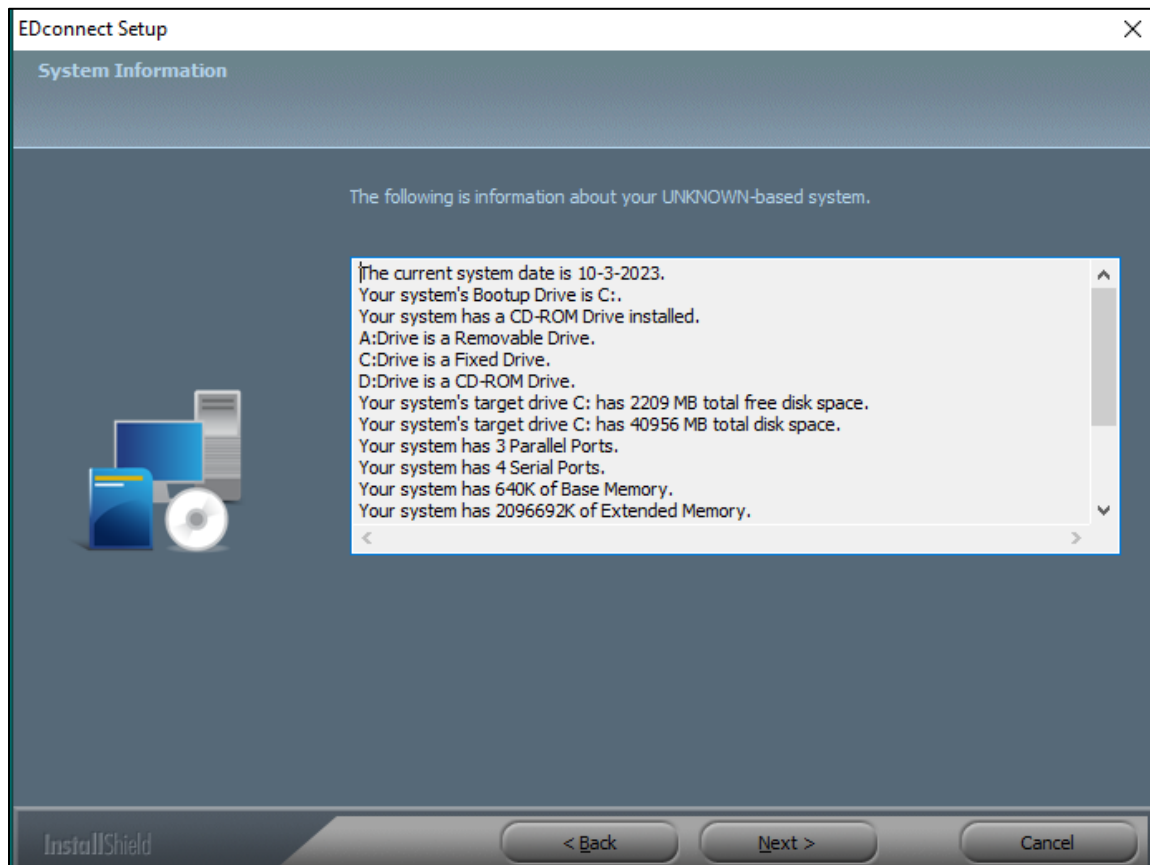
6. Select **Next** and the **Database Setup** dialog box will appear on your screen. This dialog box enables you to enter a new location for the EDconnect database or accept the default location.
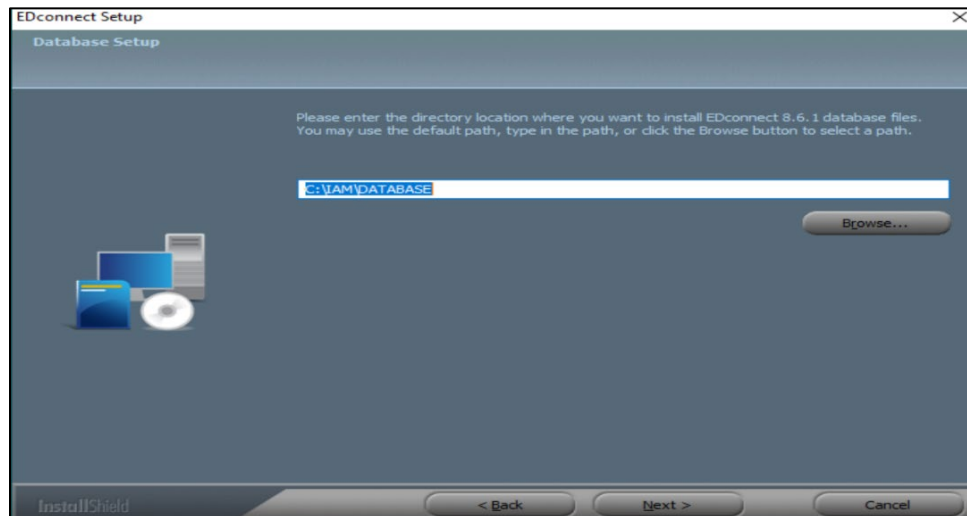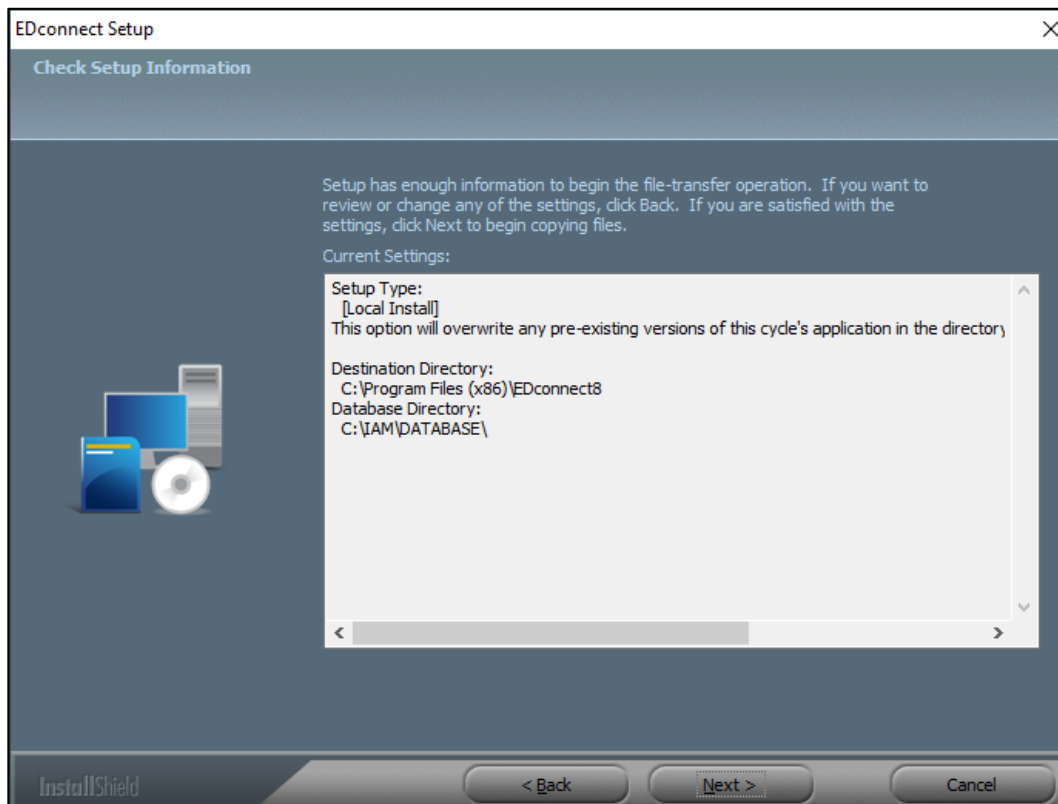
7. Select **Next** and the **Select Program Folder** dialog box will appear on your screen. This dialog box enables you to enter a new folder name, select an existing folder, or accept the default folder name of EDconnect 8.6.1.
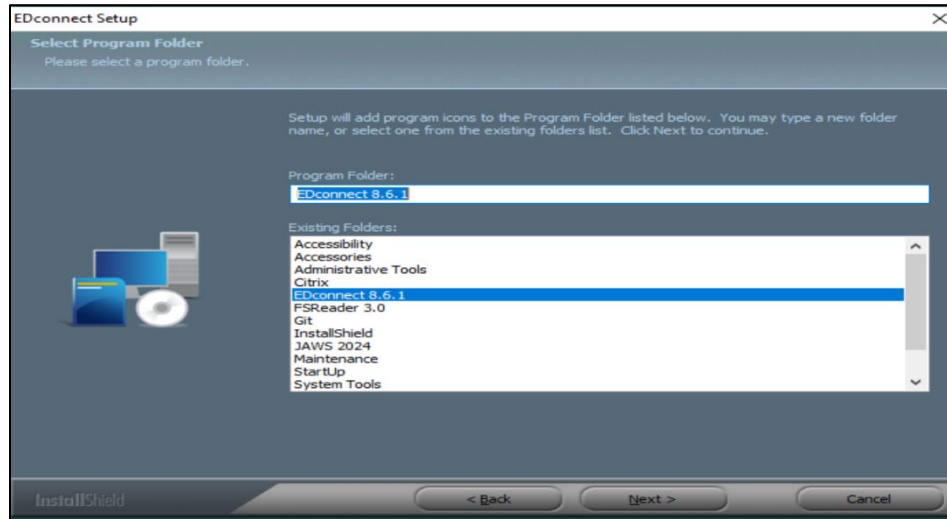
8. Select **Next** and the **System Information** dialog box will appear on your screen. This dialog box provides information about your computer system. You can ignore this information; or verify it against the minimum system requirements in the Hardware and Software Requirements section of this guide.

9. Select **Next** and the **Install Settings** dialog box will appear, confirming that setup has enough information to begin copying files to your PC. If you want to review or change any of the settings, click on the **Back** button to return to the appropriate dialog box.

EDconnect Setup   ✕

Check Setup Information

Setup has enough information to begin the file-transfer operation. If you want to review or change any of the settings, click Back. If you are satisfied with the settings, click Next to begin copying files.

Current Settings:

```
Setup Type:
  [Local Install]
This option will overwrite any pre-existing versions of this cycle's application in the directory

Destination Directory:
  C:\Program Files (x86)\EDconnect8
Database Directory:
  C:\IAM\DATABASE\
```

InstallShield   < Back   Next >   Cancel

10. Select **Next**. A progress bar appears, showing you the progress of files being copied to your hard drive. When the installation is finished, EDconnect will open a window containing icons for the program and for Transmission Queue templates.
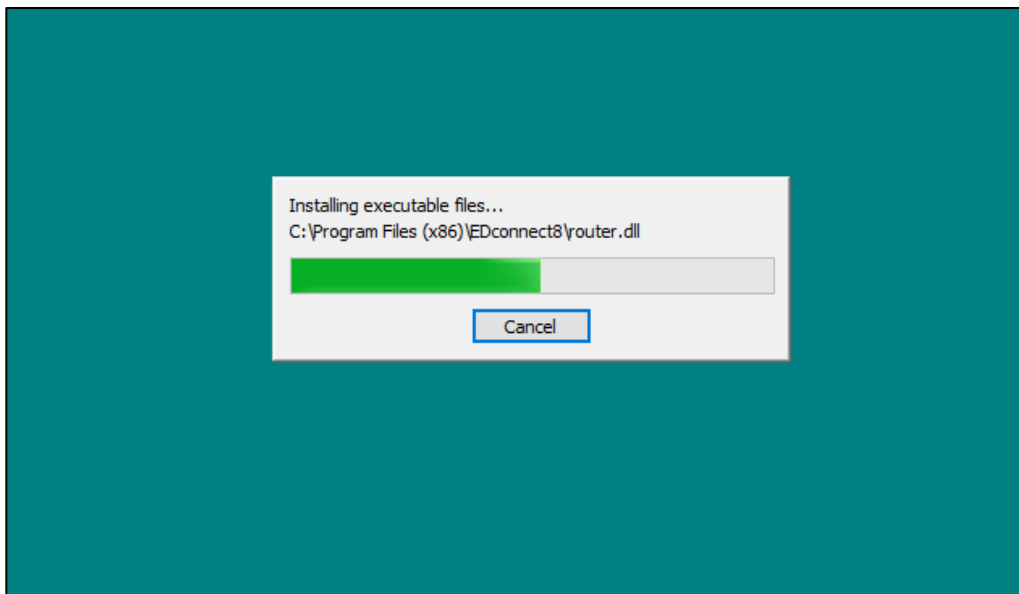
Note: If you want to create a shortcut to EDconnect on your Desktop, right-click on the EDconnect icon and select **Send To** from the menu, then select **Desktop (create shortcut)**.

11. Click **Finish**. The installation program will ask you to restart your computer.
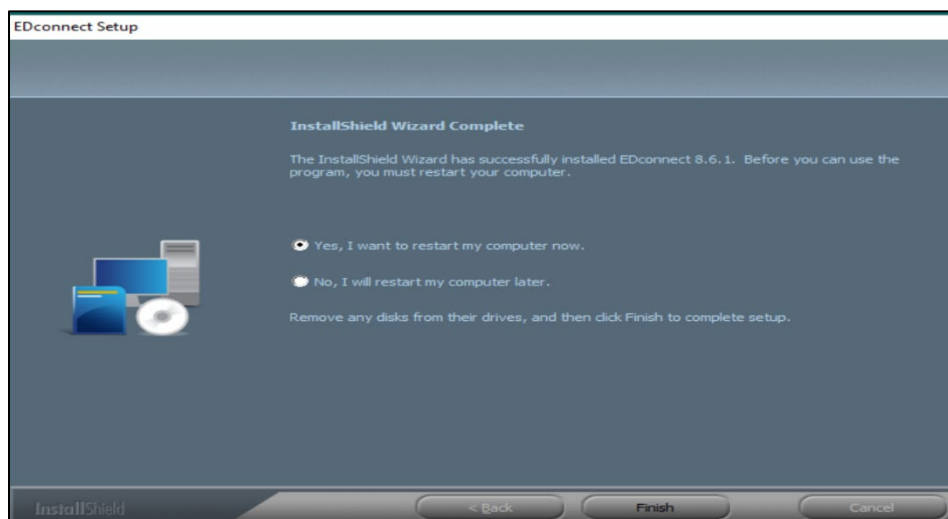
Helpful Hints

- The EDconnect database contains a record of data transfers but does **not** physically contain any of the files you have sent or received. All files you have sent or received are stored in a separate location and are unaffected by the EDconnect database. Other databases you may have on your computer, such as the EDExpress, or SSCR databases, are also unaffected by the EDconnect database.

- During the installation, EDconnect creates several Transmission Queue (TQ) template icons in the EDconnect Program Group. These icons enable quick access to commonly used default TQ template files. If you select one of these icons, EDconnect will start and will automatically fill in the Transmission Queue with the appropriate data requests. For example, selecting the **all.tqt** icon starts EDconnect and places a request in the Transmission Queue for all data and all messages currently in your mailbox.

- You can drag or copy these TQ icons, along with the EDconnect icon, to your desktop from the icon window that appears at the end of the installation.

2.5   Setting Up EDconnect

The following instructions will lead you through the steps necessary to setup EDconnect 8.6.1. These instructions assume that you have installed EDconnect 8.6.1 for the first time.
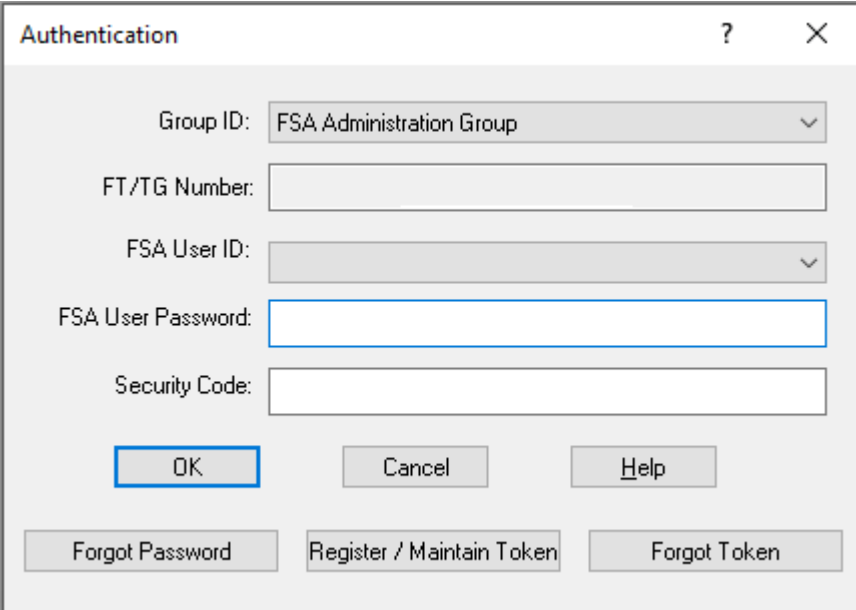
EDconnect users will also need to obtain an **FT/TG Number**, **FSA User ID, FSA User Password** and **Security Token** from FSA prior to beginning set up. The **Security Token** is a physical token (or a software-based token) that you will use to generate a **One-Time Password** to enter the **Security Code** field.

Note: You must be connected to the Internet before you start EDconnect.

1. **Start EDconnect.** When you run EDconnect for the first time, a startup information dialog box will appear. This contains warnings about using EDconnect and both critical and non-critical issues. Click **OK** to close this dialog
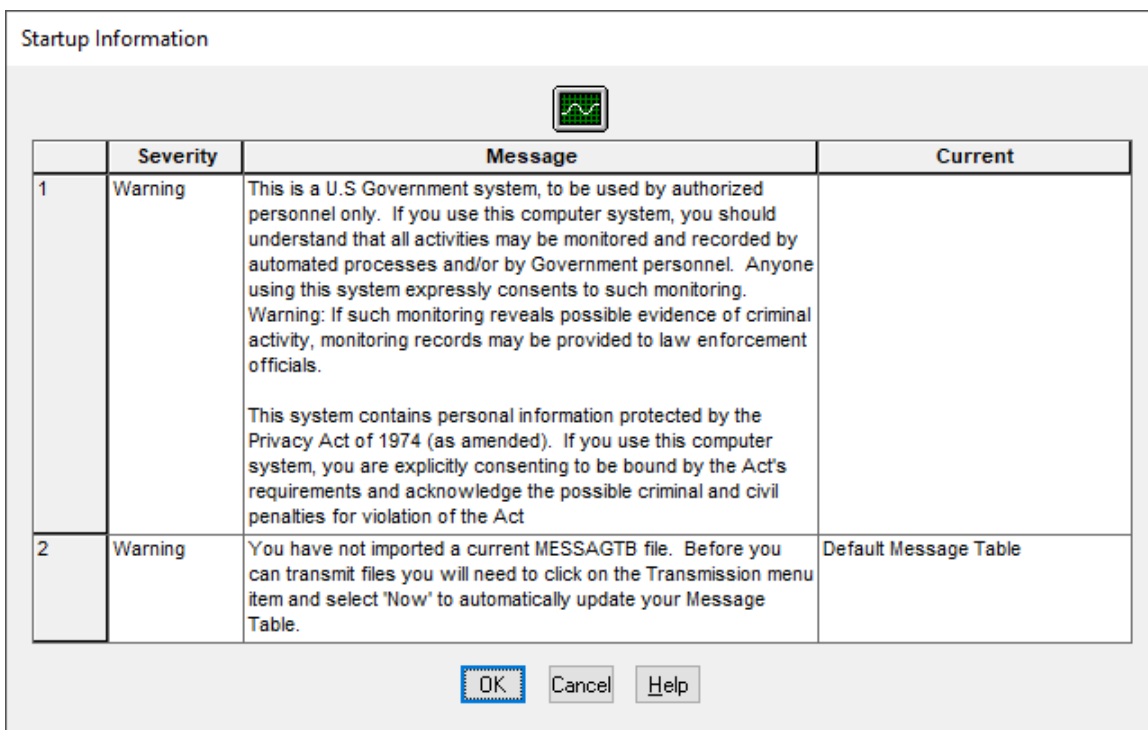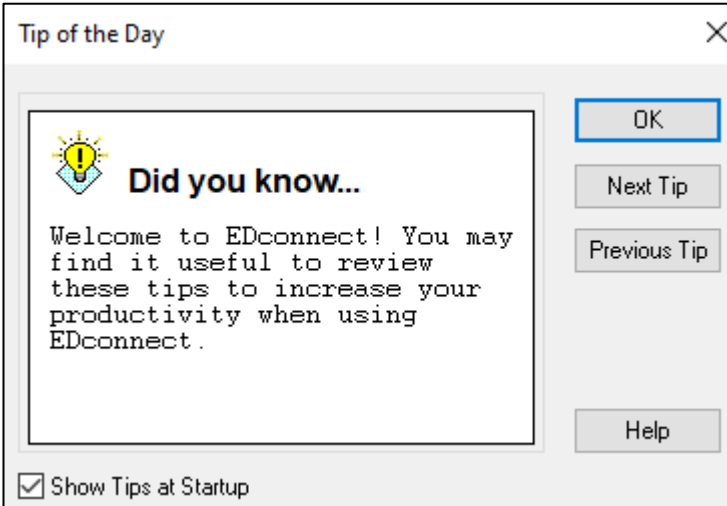
2. **Log in to EDconnect.** After you accept the warnings, a Security Authentication dialog box will appear with the default group name of **"FSA Administration Group"** already selected. Enter your **FT/TG Number**, **FSA User ID**, **FSA User Password** and **Security Code**, if applicable, and click **OK**.

   ◆ You will immediately see the "Tip of the Day" dialog box. Click **OK** to close the dialog.

3. **Create an FSA Administration Group Profile.** EDconnect will then prompt you to create the profile of the **FSA User ID** you logged in with. The **User Wizard will guide you through this.**

4. **Create a Security Group.** Only an **FSA User ID** in the **FSA Administration Group** can create other security groups. To create a security group, right click on the EDconnect folder in the **Security View** and choose **Insert**. The **Group Wizard** will lead you through the tabs of the **Group Properties** dialog box. The **Group Properties** settings control your access to the SAIG/FTI-SAIG, as well as each user's access within a group. The **FSA Administration Group** cannot conduct transmissions and therefore does not have a password field in the Network tab. Once your **FSA Administration Group** is created, you will need to create the required security groups for your institution to transmit.

5. **Perform a Local Only password change.** During the initial setup of your non-Administration security group, EDconnect will prompt you for a new SAIG/FTI-SAIG password. The first step in establishing your password is to perform a **Local Only** password change.

    ◆ If you are installing EDconnect to access a new SAIG/FTI-SAIG mailbox, the initial password is set as follows: "ccyynnnn" where "ccyy" is your birth year and "nnnn" represents the last four digits of your social security number. Enter your initial password as the Local Only password. Go to Step 7.
    ◆ If you are installing EDconnect to access an existing SAIG mailbox you have been accessing with an earlier version of EDconnect, enter the password you used in the previous version as the Local Only password. Under these circumstances, you do not need to perform a Network and Local password change. Skip to Step 8.
    ◆ If you have already performed a Local Install of EDconnect on another computer in your office and have transmitted a SAIG/FTI-SAIG password from that computer, enter that SAIG/FTI-SAIG password as a Local Only password change. Under these circumstances, you do not need to perform a Network and Local password change. Skip to Step 8.

6. **Change your SAIG/FTI-SAIG password.** After you perform a **Local Only** password change, you must perform a **Network and Local** password change to establish your password on the SAIG/FTI-SAIG. When you change your SAIG/FTI-SAIG password, be sure to select **Network and Local**. This adds a password change record to the **Transmission Queue**. EDconnect will transmit the password change the next time you connect to the SAIG/FTI-SAIG.

7. **Set up a personal FSA User ID.** After you set up your **FSA Administration Group** profile, you will need to set up your **FSA User ID**. To create a new user, select the group name, right click, and select Insert. The **User Wizard** will lead you through the tabs of the **User Properties** dialog box.
    ◆ When you set up an FSA User ID, you will notice a small box on the User Profile box labeled "Unattended Transfer User ID?". If you will be sending .imp files with this user ID, you will need to check this box to allow the user this permission.

- ◆ **Note:** Unattended users will not display in the dropdown list of the Security Authentication screen and will not be able to log in. It is not recommended that you make an FSA User ID into an unattended user. See Section 5.3.13 Unattended Transfer User ID and .imp Files for more detailed information about setting up unattended users.
- ◆ **Note:** FT mailboxes cannot be used in unattended mode.

8. **Download the message class table.** Message class tables "teach" EDconnect what kinds of files it can send and receive. These tables are placed periodically into your SAIG mailbox. Your mailbox will contain the latest message class table. When you connect to the SAIG, it will automatically download to your PC and import into EDconnect**.**
   - ◆ **Note:** Users will need to connect quarterly after the updates.

9. **Coordinate global file paths for sending and receiving files**. EDconnect does not automatically create paths for sending and receiving data. If you do not specify Send and Receive paths, EDconnect will use the paths listed in the Filename field of the **Message Class Manager.**
   - ◆ You can change the paths on the **Directories** tab of the **User Properties** dialog box. Right-click the **FSA User ID** you wish to edit and select **Properties** from the pop-up menu. Click the **Directories** tab. At the top of the tab, a drop-down list will enable you to select **Database**, **Send**, or **Receive**.
   - ◆ The **Database** path will reflect the current location of the EDconnect database, but the **Send** and **Receive** paths will be blank. Select **Send** or **Receive**, then type in the full path, including drive letter, or use the **Browse** button to find the correct folder.

◆ Be sure to enter a location for both the **Send** and **Receive** folders. If you would like to use the same setting for all existing users in a specific group, place a check in the box marked "Set all users of this group to the specified directories."

2.5.1   Setting up a Test Security Group (**SAIG users only**)

If you have been advised to do so, EDconnect 8.6.1 enables you to set up a test Security Group to send and receive files from the SAIG test system without interfering with your production Security Group(s). See *Section 3.4 Security Groups* for further information about setting up a test Security Group.

**NOTE:** This does not apply to FTI-SAIG users.

2.5.2 Selecting a Connection

EDconnect 8.6.1 uses the Internet to access the SAIG/FTI-SAIG. You will need to be connected to the Internet before you can login to EDconnect. Your Internet connection to the SAIG/FTI-SAIG has no relationship to the dial-up connection used by earlier versions of EDconnect.

The first **FSA User ID** to login *after setup* that is not in the **FSA Administration Group** will be prompted to set a connection. This only needs to be done once.

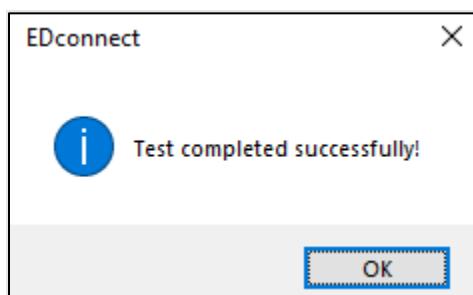### 2.5.2.1   Setting up the Connection When Prompted

1. Start EDconnect and login via the **Security Authentication** screen as a new first time **FSA User**. You will then receive a message that indicates a connection must be selected to transmit. Click **OK**.
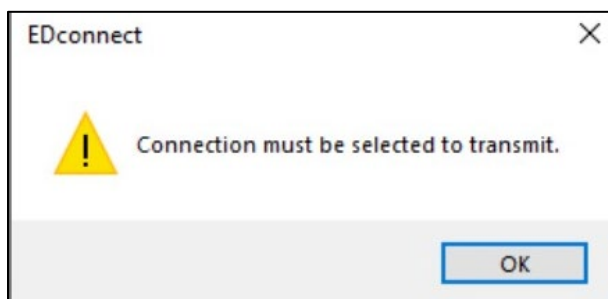
2. If you select **No**, skip to Section *3.6.1 Selecting a Connection* for details on how to setup the connection later. Note that you cannot transmit until this connection is set up. If you choose yes, you will get the Connection Properties dialog box.
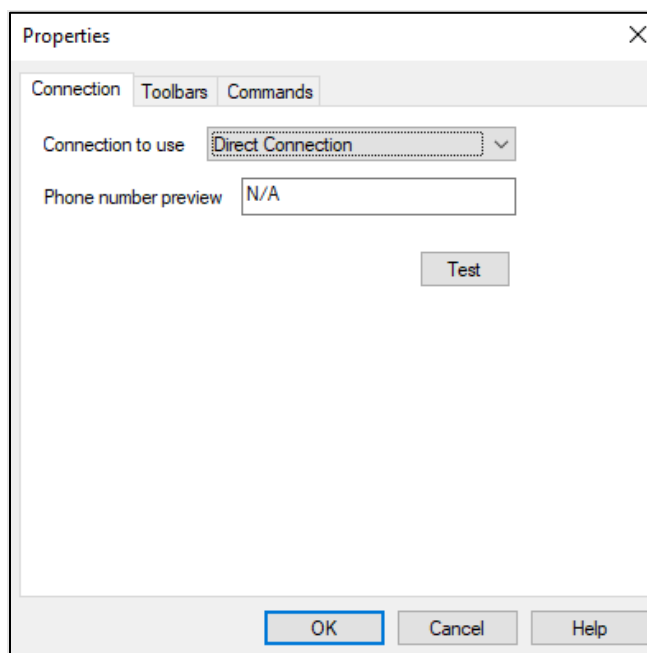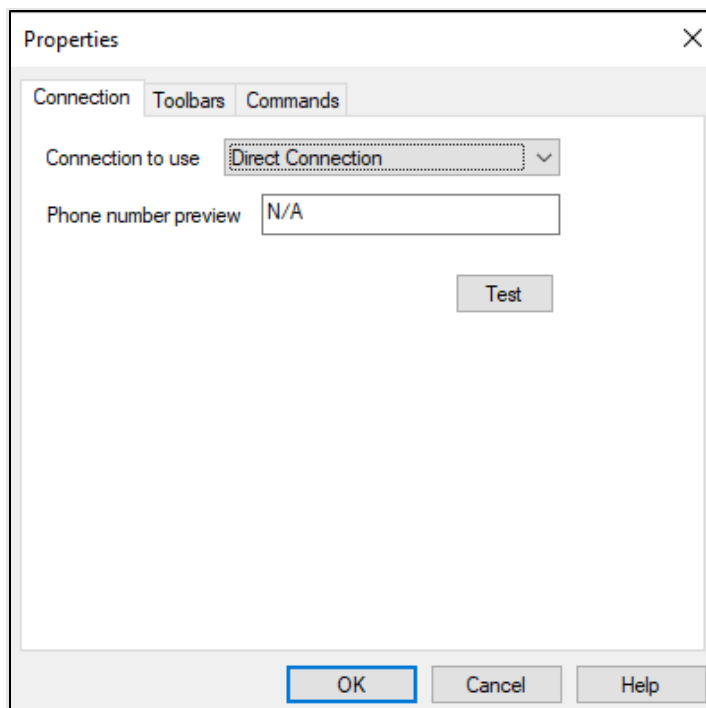

   - The drop-down list in the Connection to use selection box displays a list of Internet connections available on your computer. If you have a direct connection to the Internet, such as DSL, T1, or cable, "Direct Connection" may be the only option listed. If you connect to the Internet using a modem and an Internet Service Provider (ISP), in most cases your ISP's dial-up connection will appear on the list.

3. After selecting your connection, click the **Test** button. You will receive a confirmation message.

## 2.5.2.2 Setting up the Connection Without Prompts

If you opted No at the prompt, or want to set the connection later, follow these steps. Remember that if you do this while logged in under FSA Administration Group, you will not be able to access the Transmission Wizard or run a transmission test.

1. Select Tools from the EDconnect main bar menu, then Customize. You should see the Connection Properties dialog box.

- ◆ 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 cable, "Direct Connection" may be the only option listed. If you connect to the Internet using a modem and an Internet Service Provider (ISP), in most cases your ISP's dial-up connection will appear on the list.

2. After selecting your connection, click the **Test** button. You will receive a confirmation message.
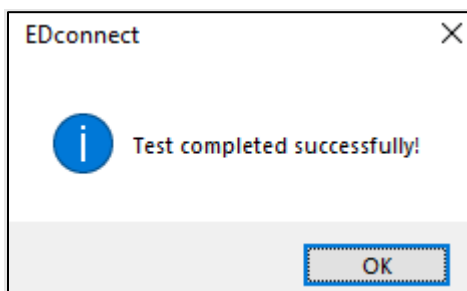
3. You will not receive the Transmisson Wizard at this point. You can however, test the transmission connection at any time by choosing **Test** under the Transmission menu in the main EDconnect menu bar.

2.5.2.3   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 25 and makes standard Internet connections through port number 80.

A firewall can prevent EDconnect from communicating with the SAIG/FTI-SAIG by blocking the packets of information your computer is trying to send to and receive from the SAIG/FTI-SAIG. If you have trouble connecting to the SAIG/FTI-SAIG after installing EDconnect 8.6.1, 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** and **fsaesb.ed.gov** to enable EDconnect to communicate through the firewall to the legacy SAIG and new FTI systems.

In order to use the **TDCM** or **FTI-TDCM**, you need to be able to connect to **https://saigportal.ed.gov/tdcm** (SAIG system) and **https://ftisaigportal.ed.gov/tdcm** (FTI-SAIG system) and will need port number 443 open. Information about using the TDCM or FTI-TDCM is available in the SAIG/FTI-SAIG Mailbox Software & Manuals: EDconnect, TDClient, TDCM and FTI-TDCM section on the FSA Knowledge Center Web website (https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools/edconnect).

2.5.2.4   Getting Help

For help installing or using EDconnect, contact the SAIG/CPS Help Desk at 800-330-5947 or by e-mail at **CPSSAIG@ed.gov**.

3. Using EDconnect

3.1   Destination Point Administration

The Destination Point Administrator (DPA) is the "owner" of the SAIG/FTI-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 **FT/TG number**, a common **Connection Type** ("Production" or "Test" for SAIG users, "FTI" for FTI users), a common **SAIG/FTI-SAIG Password**, and common access to the SAIG/FTI-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/FTI-SAIG.

 ◆ Each **FSA User ID** has its own **FSA User Password**. The DPA should have a signed **SAIG/FTI-SAIG User Statement** on file for each user.
 ◆ When you enroll through the SAIG/FTI-SAIG Enrollment Site (**fsawebenroll.ed.gov)**, you are required to print the **SAIG/FTI-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/FTI-SAIG Passwords** at the *group* level.
 ◆ FSA controls and issues access to EDconnect.
 ◆ You control startup options, color preferences, and file directory locations at the *user* level.
 ◆ **FSA User IDs** can belong to multiple groups in the **Security View**.

3.2   Security Authentication for User Logons

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

EDconnect utilizes Two-Factor Authentication (TFA) to authenticate a user. User IDs and passwords are issued by FSA. Access to EDconnect requires a **Group ID**, **FT/TG Number**, **FSA User ID**, **FSA User Password**, and a **Security Code**. All **FSA Users IDs** will be required to enter a **Security Code**.

- ◆ FSA will issue your institution a Security Token. This is a physical token that will generate a One-Time Password that is required to log into EDconnect.
- ◆ Each group can be associated with a different FT/TG number.
- ◆ If a user belongs to more than one group, the EDconnect Security Authentication dialog box enables the user to select the group to log in under for that session.

In the illustrations below, the FSA User ID "peter.pdpa.fsa" belongs to both the "FSA Administration Group" and the "FISAP" group. He can login to the software under either group.

The **Security Code** field is where a user will enter the **One-Time Password** generated by a physical token or a software-based token that is issued by FSA. This token must be registered through FSA. To register a token, select the **Register/Maintain Token** button on the Security Authentication screen. Users will then be routed to the **Login - AIMS TFA Portal**.

If you have forgotten your token and cannot generate the **One-Time Password**, you can reset it by selecting the **Forgot Token** button on the Security Authentication screen. Users will then be routed to the **Login - AIMS TFA Portal**.

If you have forgotten your password, you can reset it by selecting the **Forgot Password** button on the Security Authentication screen. Users will then be routed to the **Change Password** website.

3.3   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 **SAIG/FTI-SAIG Passwords** at the *group* level.
- ◆ FSA controls and issues access to EDconnect.
- ◆ You control startup options, color preferences, and file directory locations at the *user* level.
- ◆ **FSA User IDs** can belong to different groups in the **Security View**.
- ◆ An illustration of an EDconnect Security View is shown below:
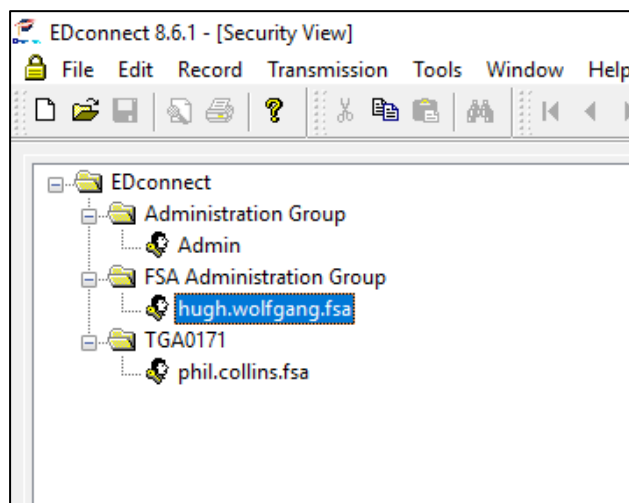
In the example below, "FSA Administration Group", "FISAP" and "COD" represent **Security Groups**, while the individual names below the group names signify users within those groups.
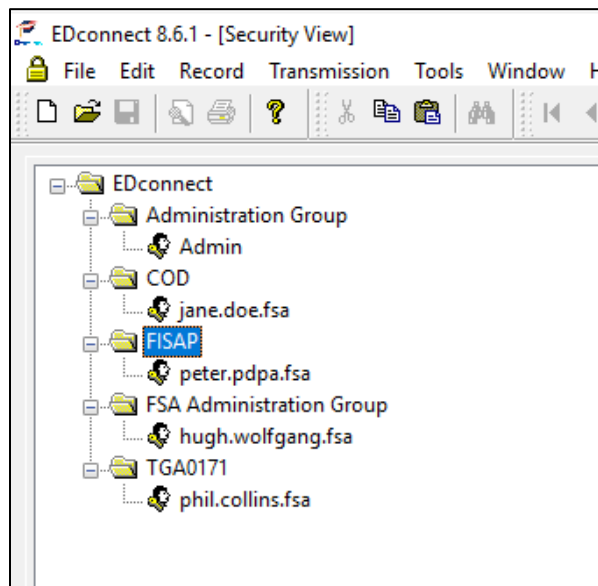
There are three methods to move a user to another group.

Only a user belonging to the **FSA Administration Group** can move a user to another group by dragging and dropping the **FSA User ID**.

To drag and drop an FSA User ID

1. Select the **FSA 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 **FSA User ID**.

3. Release the mouse button.

Any FSA Administrator or Group user has the functionality to copy one user from one group to another group.

To copy an FSA User ID

1. Click on the **FSA 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 **FSA User ID**.

4. Select Paste from the Edit menu.

Any FSA user can delete another user and re-insert that user into another group, unless the deleted and re-inserted user is a member of the FSA Administration Group.

Delete and Re-Insert

1. Click on the **FSA User ID** you want to copy. The **FSA User ID** will appear highlighted.

2. Click with the right mouse button and select **Delete** from the pop-up menu and click yes to the "Delete User?" message.

3. Click with the right mouse button on the Group you want to add the **FSA User ID** to and select Insert from the pop-up menu

4. Use the User Wizard to recreate the deleted **FSA User ID**.

3.4   Security Groups

Within EDconnect, a **Security Group** represents a collection of users who connect to the SAIG using the same **FT/TG number**, the same **Connection Type** ("Production" or "Test"), and the same **SAIG/FTI-SAIG Password.**

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

Security Group *names* often correlate to the group's function, i.e., FISAP, COD, CPS, etc.
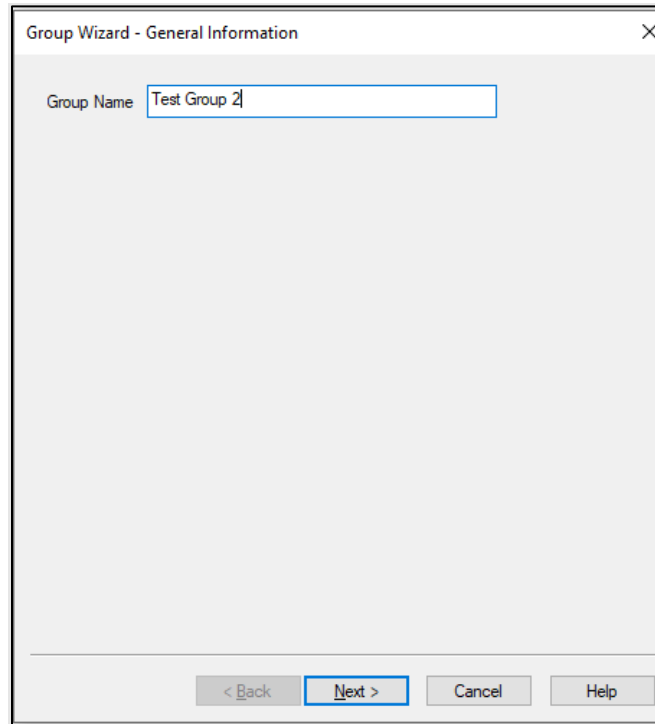
Connection type can be set either by the current user or will be prompted to the first non-Administration user to login. See Section *3.6.1 Selecting a Connection* for more detail.

Only an **FSA Administration Group** user can create or delete groups, as well as modify group FT/TG Numbers. The **FSA Administration Group** is a permanent group and cannot be deleted.

3.4.1   To add a "Production" or "FTI" 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.

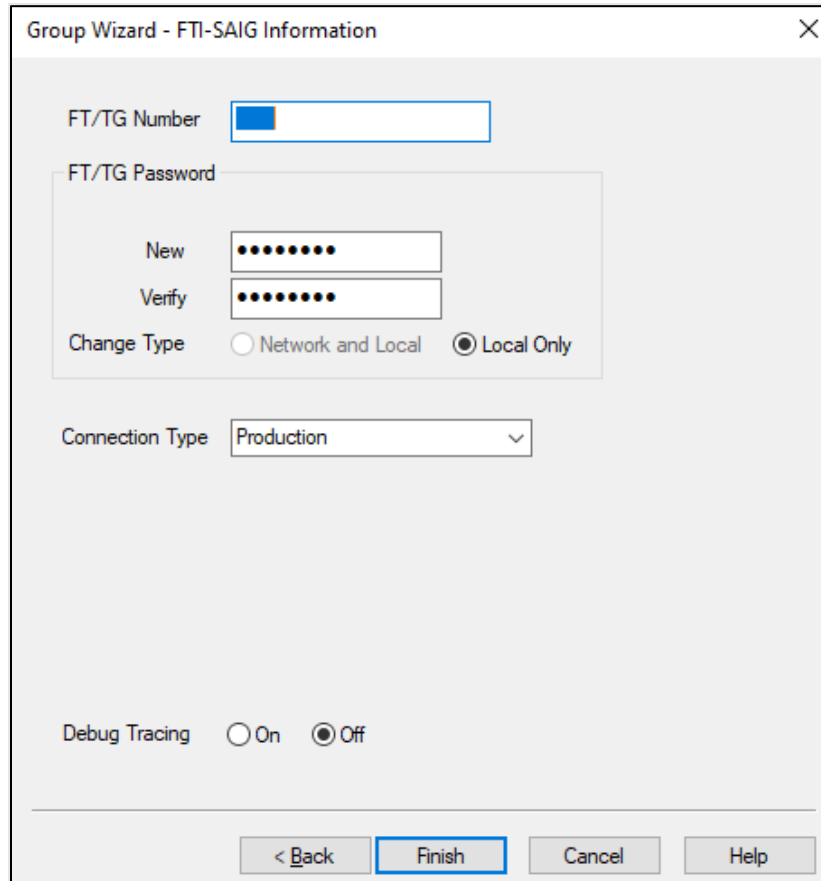4. Complete the **General Information** screen by providing a group name. Click **Next**.

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

	Area	Action	Access	
1	Transmission Queue	Read	☑	
2		Delete	☑	
3		Update	☑	
4	Activity Log	Read	☑	
5		Delete	☑	
6		Update	☑	
7	Mailbox Query	Read	☑	
8		Delete	☑	
9		Update	☑	
10	Message Class Manager	Read	☑	
11		Update	☑	
12	Import	Transmission Queue	☑	
13		Message Class Table	☑	

Group Wizard - Access Rights

< Back   Next >   Cancel   Help

6. Set up **SAIG/FTI-SAIG Password** information for the group by completing the **SAIG/FTI-SAIG Information** screen. Leave the **Connection Type** set to the default value "Production" for TG users, and "FTI" for FT users.

7. Click **Finish**.

3.4.2 To add a "Test" Security Group (**SAIG only**)

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 **Information** tab.

NOTE: Test Security Groups do not apply to the FTI-SAIG system, only to the SAIG system.

Helpful Hints

- ◆ You can also access the **Group Wizard** by highlighting **EDconnect** in the **Security View** and selecting **Insert Record** from the **Record** menu.
- ◆ Multiple groups can have access to the same FT/TG number, but they cannot have the same group name. For example, groups 'FISAP' and 'COD' can both have access to TGA0376, but you cannot have two groups named 'FISAP'.

3.4.3 To delete a Security Group

You must be logged in as a user of the **FSA Administration Group** to delete a 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 **Delete** from the pop-up menu.

4. Verify confirmation message, "Delete the group COD and all users within this group?" and select yes.
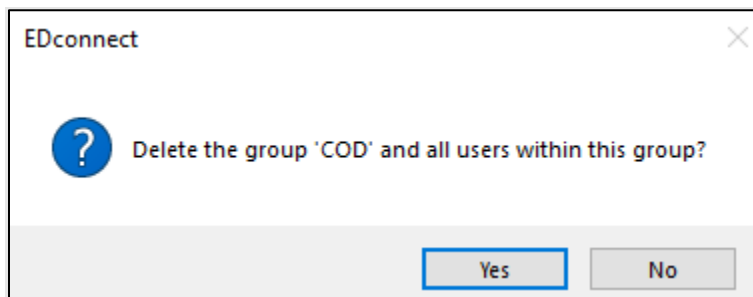
3.4.4 To Modify a Security Group

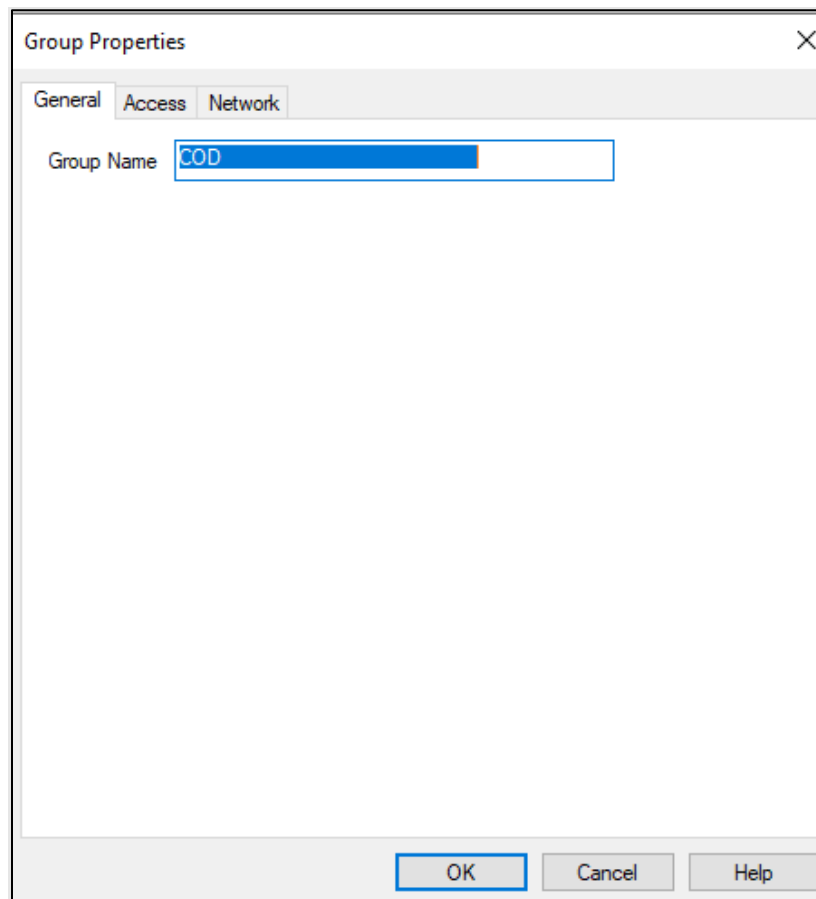You must be logged in as a user of the **FSA Administration Group** to modify a Security group.

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

4. Verify the **Group Properties** dialog box open, displaying the **Group Properties** screen with the group name visible.

5. From this screen, you can select which tab you need to make your modifications. Click **Apply** and then **OK** when you are finished.

3.5 Users

Within EDconnect, users represent the individuals within **Security Groups** who access the SAIG through that group's **FT/TG number**. You add users to **Security Groups** in the **Security View**. Users must be added using an FSA User ID. **FSA User ID**s and **FSA User Password**s are issued by FSA.

By default, any **FSA User ID** can create and delete other users, except those in the **FSA Administration Group**.

3.5.1 To add an FSA 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**. Remember that all user IDs must be **FSA User ID**s, or they will not be allowed access to **EDconnect**. For more on the 'Unattended Transfer User ID' box, see *Helpful Hints* below.

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 **Group Wizard** is associated with your **FT/TG number** and enables your destination point to connect to the SAIG/FTI-SAIG.
- ◆ All user IDs must be FSA User IDs, otherwise they will not be allowed access to EDconnect.
- ◆ The 'Unattended Transfer User ID' box is to be checked only when the **FSA User ID** will be sending .imp files. When this box is checked, the **FSA User ID** will not show up in the drop down of the **Security Authentication** dialog box. For more on .imp files, see section *5.1.1 Import (.imp) Files.*

3.5.2 To delete an FSA 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, highlighted here.
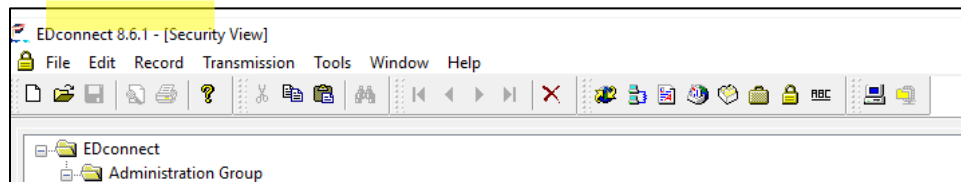
2. Right-click on the **Security Group** to which you want to delete a user.

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

4. Verify confirmation message, "Delete the user harry.potter.fsa?"
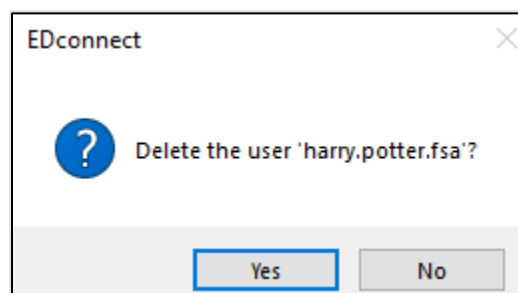
5. Click **Yes**.

3.5.3 To Modify an FSA 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 modify a user.

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

4. Verify the **User Properties** dialog box appears.

5. Select the tab where you want to make the modification, (In this example, the Full Name field will be modified.)

6. After your modification is made, click **Apply**, and **OK**.

3.6 SAIG/FTI-SAIG Test Connection

This section provides guidance to users who wish to perform a TEST connection to confirm whether EDconnect is able to connect to their mailbox and transfer files. You must be connected to the Internet before starting EDconnect.

If you have questions about using the Transmission Wizard, please contact CPS/SAIG Technical Support at 1-800-330-5947 or by email at cpssaig@ed.gov.

3.6.1 Selecting a Connection

There are two methods to select your connection.

Method 1 - The first **FSA User ID** that is not part of the **FSA Administration Group** will be prompted to choose a connection upon initial login.
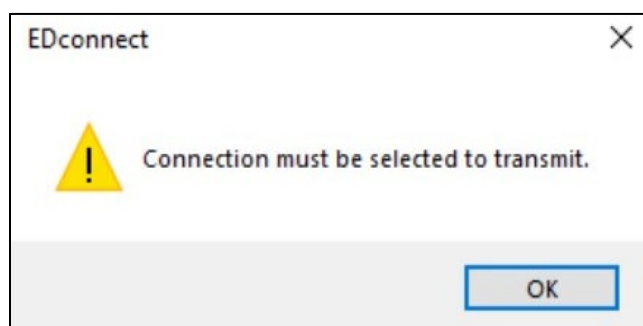
1. Click **OK.** You will be prompted to select one from the Connection Properties dialog box.
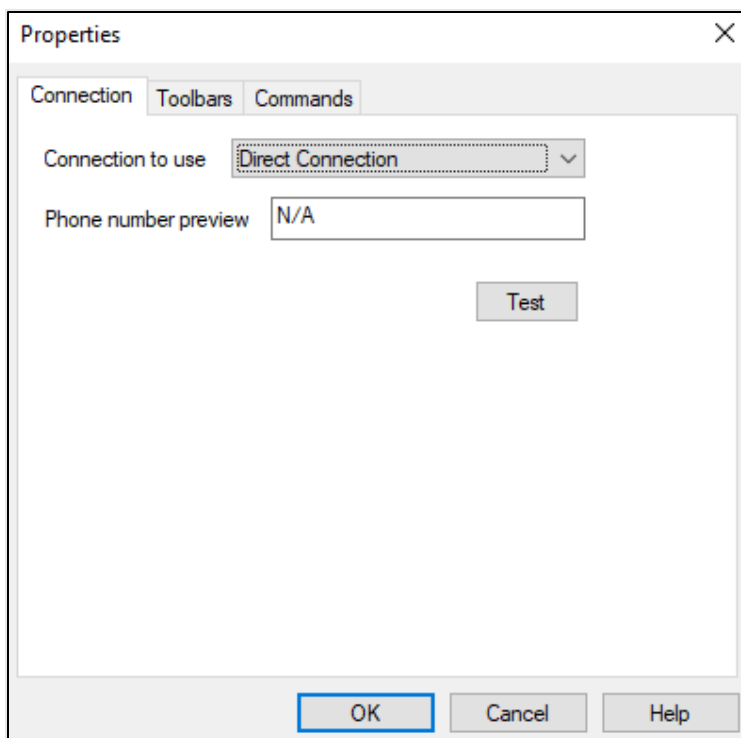
2. (Optional) Click **Test** to test the connection you have selected. You will receive a "Test completed successfully!" message.
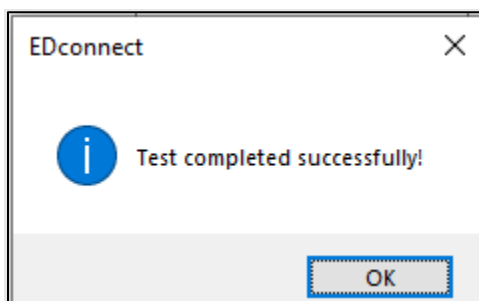
3. Click **OK**.

4. If this is your initial login or set-up, the **Transmission Wizard** will appear. You can run this test now or choose to skip it by checking the **"I want to skip this test"** box. (Not recommended). You can also test your connection at any time by selecting '**TEST'** from the **Transmission** menu at the top of the screen.
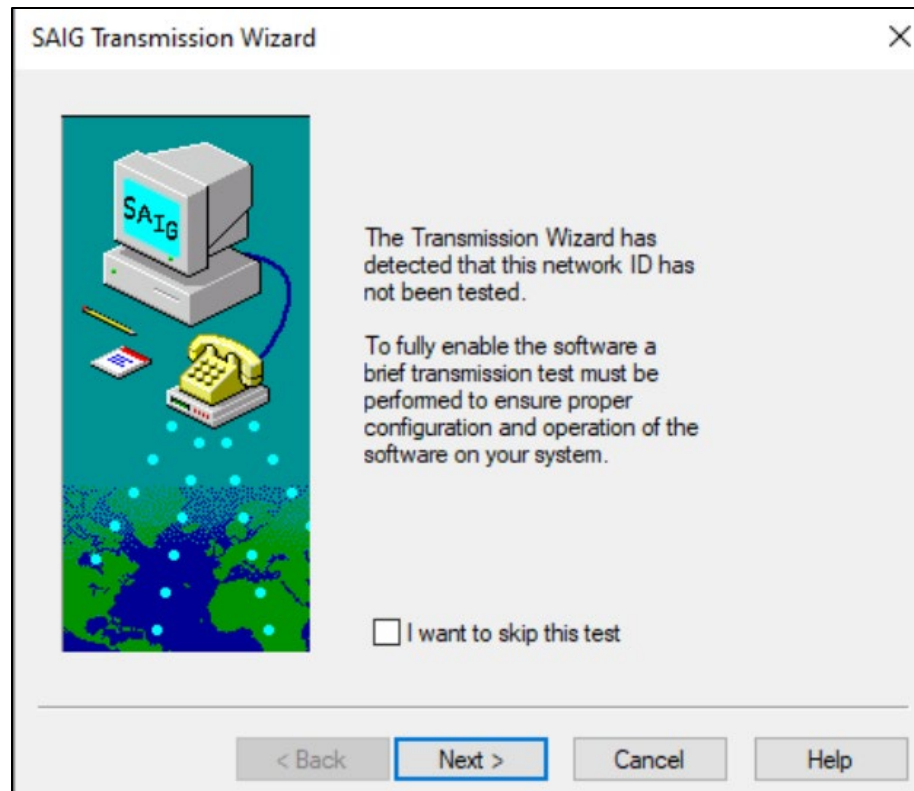
Method 2 - The second is a manual selection.

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.
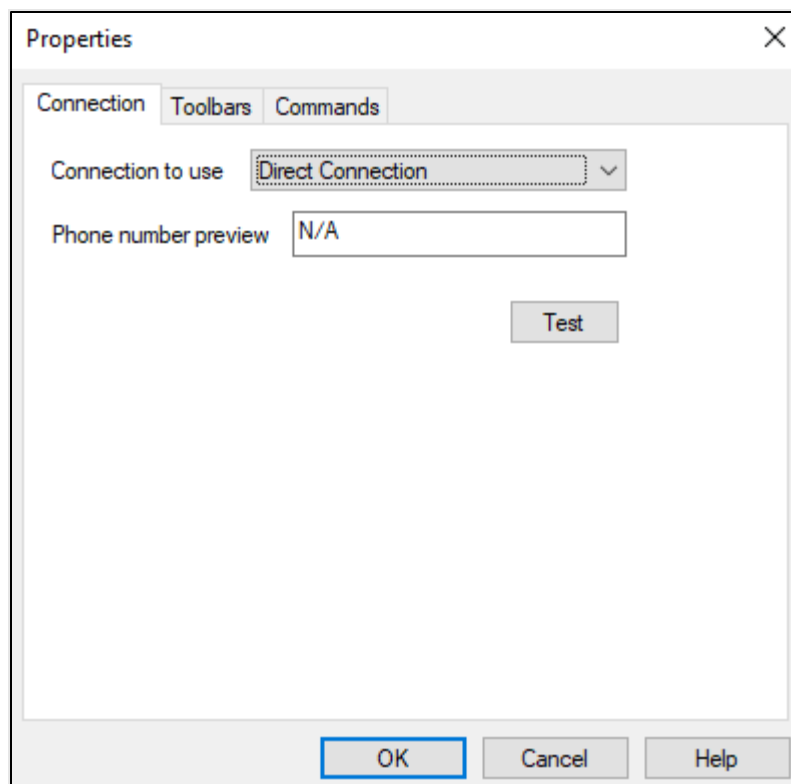
4. (Optional) Click **Test** to test the connection you have selected. You will receive a "Test completed successfully!" message.
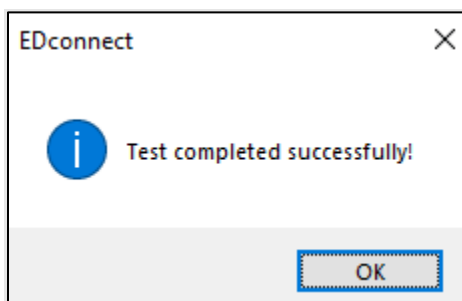
5. Click **OK**.

6. If this is your initial login or set-up, the **Transmission Wizard** will appear. You can run this test now or choose to skip it by checking the **"I want to skip this test"** box. (Not recommended). You can also test your connection at any time by selecting '**TEST**' from the **Transmission** menu at the top of the screen.
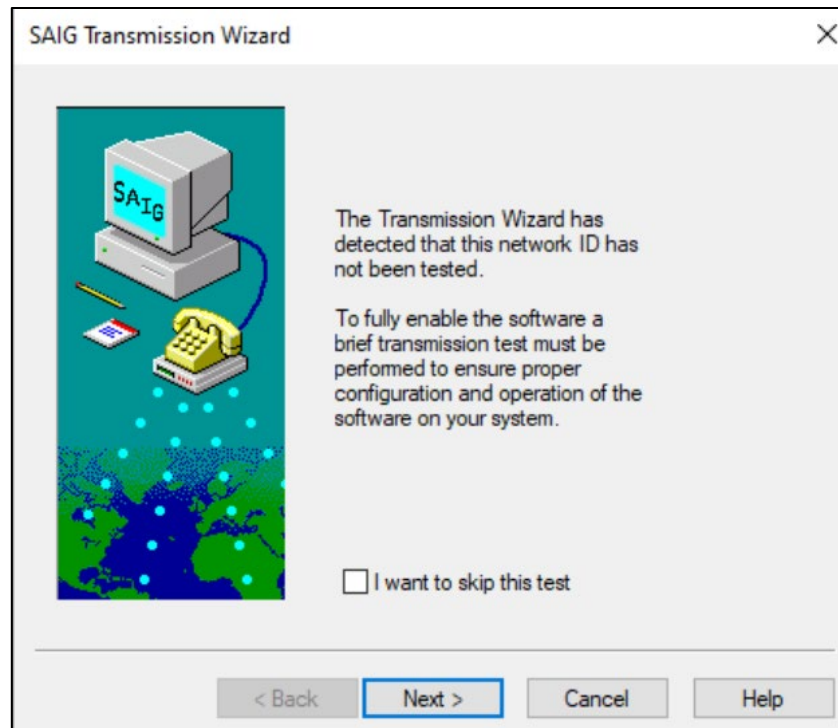
7. During the transmission test the window will look like these screenshots:
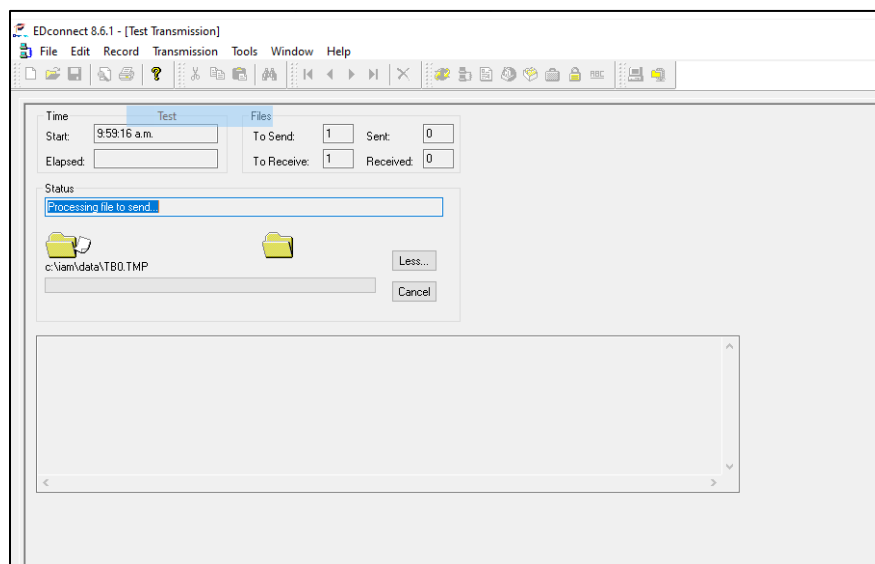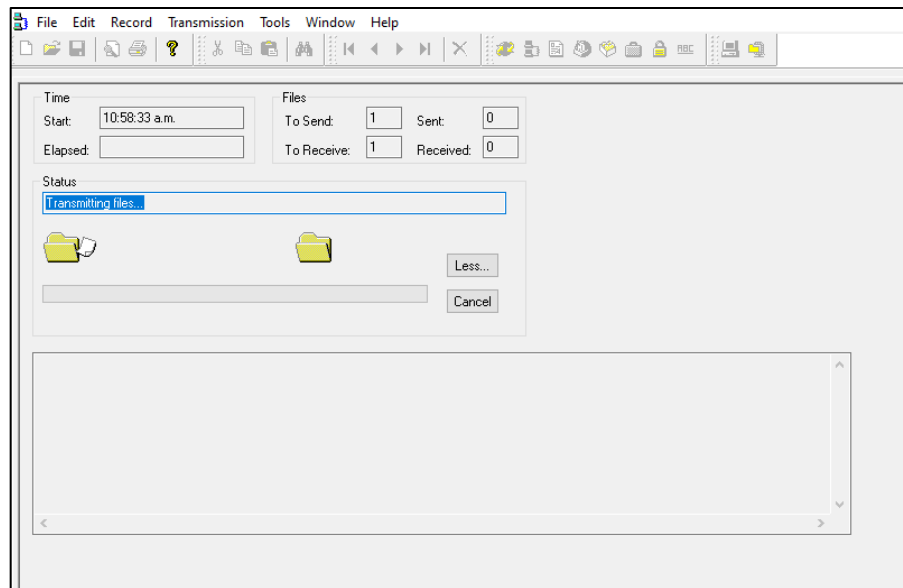
8. Upon successful completion of the transmission test it will show:
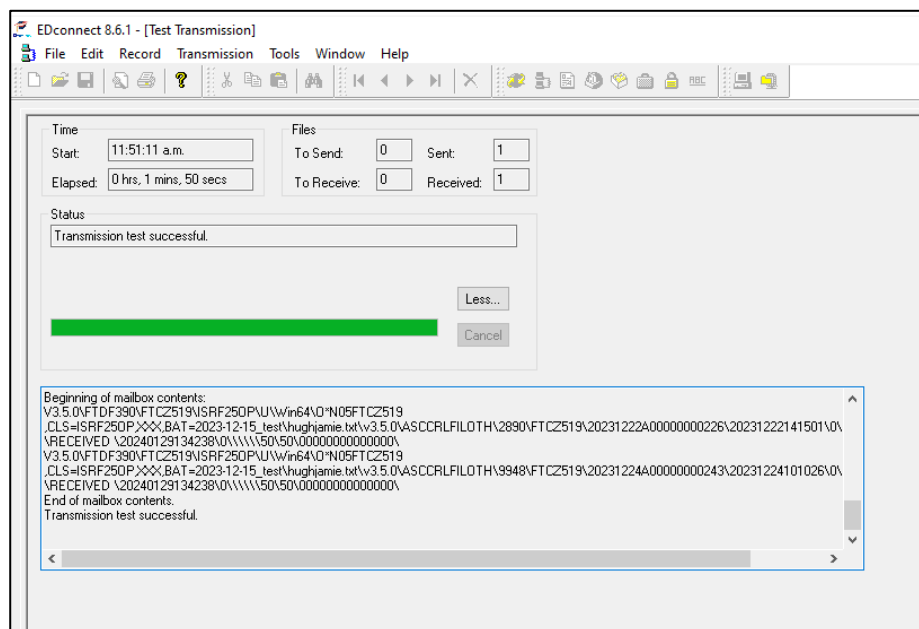
3.7   Firewalls

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/FTI-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 outbound TCP/IP traffic and give your computer access to **saigmailbox.ed.gov** and **fsaesb.ed.gov** to allow EDconnect to communicate through the firewall.

If you have trouble logging into the FTI-SAIG after installing the new version of EDconnect, contact your technical support staff to see if to **saigmailbox.ed.gov** and **fsaesb.ed.gov** are currently blocked by your organization's IT department.

3.8 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**.
FTI-SAIG Connection Wizard	Prompts you to select a connection to use to send and receive data.	Select **Yes**, when prompted, to select a connection.
FTI-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.

4. Passwords

4.1   Types of Passwords
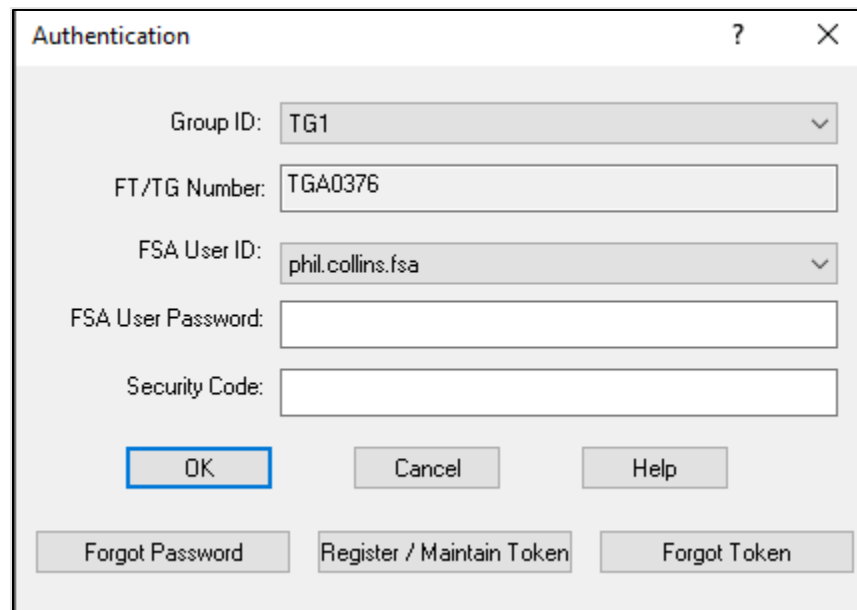
EDconnect requires three different types of passwords: **FSA User Passwords, Security Codes**, and **SAIG/FTI-SAIG Mailbox Passwords**.

Each user must enter an **FSA User Password** and **Security Code** to log into the software. The Security Code is a One-time Passcode (OTP) auto generated by a security token that FSA has provided to the user after the PM enrollment process has been completed. EDconnect uses the **SAIG/FTI-SAIG Password** (also known as your SAIG/FTI-SAIG mailbox password) to connect to the SAIG/FTI-SAIG. EDconnect also requires a certificate for authentication to AIMS, in order to transmit data.

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

4.1.1   FSA User Password and One-Time Password (OTP)

- ◆ FSA User Passwords are issued by FSA.
- ◆ To change your password, select the **Forgot Password** button on the Security Authentication screen. Users will then be routed to the **Change Password** website and guided through the process.

4.1.2   SAIG/FTI-SAIG Password

The **SAIG/FTI-SAIG Password** is independent of the EDconnect **FSA User ID Password**. The **SAIG/FTI-SAIG Password** is controlled at the group level and is the password for your mailbox.

Users can set or change the **SAIG/FTI-SAIG Password** on the Network tab of the **Group Properties** dialog box. See Section *4.3 SAIG/FTI-SAIG Passwords* for detailed instructions on how to change your **SAIG/FTI-SAIG Password**.

4.2   FSA User Password

Each user must enter an **FSA User Password** to log into the EDconnect software. Each **FSA User ID** in the EDconnect **Security View** has its own personal password.

When you start EDconnect, the **Security Authentication** dialog box will appear. Enter or select your **Group ID**, **FT/TG Number**, and **FSA User ID,** assigned by FSA, from the drop-down list and enter the **FSA User Password** and your **Security Code** (one-time password).

Note: EDconnect has specific rules for the FSA User Password:

- The password must have a minimum length of 15 characters and must contain each of the following four types of characters
  - o   English uppercase letters (A-Z)
  - o   English lowercase letters (a-z)
  - o   Westernized Arabic numerals (0-9)
  - o   and non-alphanumeric special characters, specifically (!,@,#,$,&,*)
- The password cannot contain any words that are easily guessed like dictionary words, names, or acronyms
- The password must contain at least four (4) alphabetic characters, and
- The password cannot contain three (3) or more identical characters in a row.

Helpful Hints

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

4.2.1 Changing Your FSA User Password

FSA user passwords are managed by FSA through the AIMs website. You can access this website by selecting the **Forgot Password** button on the Security Authentication screen where you will be guided through the process of changing your FSA User Password.

After you have successfully changed your password, return to the Security Authentication screen to login.

Helpful Hints

- All passwords in EDconnect are case-sensitive.
- Be sure to use the same capitalization each time you type your **FSA User Password**.

4.3 SAIG/FTI-SAIG Password

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

*Note: Your **"Production"** SAIG password and your **"Test"** SAIG password are not in sync. If you are unable to access the test environment, contact the SAIG/CPS Help Desk to have them reset your test password. Passwords expire after 90 days. This is only applicable for SAIG users; FTI-SAIG users do not have access to the test environment.*

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

EDconnect has specific rules for SAIG/FTI-SAIG passwords:

- Must be a minimum length of 15 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 24 passwords
- Password will be locked out after three failures. (You must wait 15 minutes for your password to be unlocked. After 15 minutes, you can try again. If you have forgotten your password.
- Can contain special characters
- SAIG/FTI-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/FTI-SAIG Passwords** expire every 90 days.

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

You can set up more than one **Security Group** with the same **FT/TG number** and **Connection Type**. Since these groups connect to the SAIG/FTI-SAIG with the same **FT/TG number** and **Connection Type**, they must use the same **SAIG/FTI-SAIG Password**.

Helpful Hints

- Each FT/TG number/Connection Type combination has its own **SAIG/FTI-SAIG Password**.
- Each user of EDconnect has her or his own **FSA User Password**.
- Users do not need to know the **SAIG/FTI-SAIG Password** to log into EDconnect or to transmit.
- As the expiration date for your **SAIG/FTI-SAIG Password** approaches, you will receive a warning that the password is about to expire when you transmit with EDconnect.
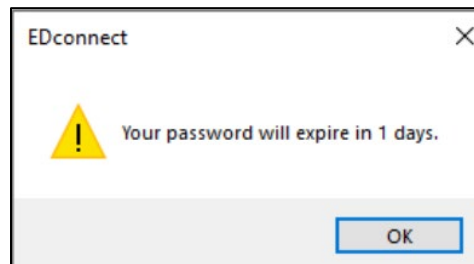
4.3.1 Changing Your SAIG/FTI-SAIG Password

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

Your **SAIG/FTI-SAIG Password** is associated with your **FT/TG number** and **Connection Type** and is stored within EDconnect and on the SAIG/FTI-SAIG. Your SAIG/FTI-SAIG mailbox compares the password transmitted by EDconnect with the password stored on the SAIG/FTI-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/FTI-SAIG mailbox.
- A **Network and Local** password change sets the password within EDconnect *and* transmits the change to your SAIG/FTI-SAIG mailbox.

If you have had your **SAIG/FTI-SAIG Password** reset by the SAIG/CPS Help Desk, you must:

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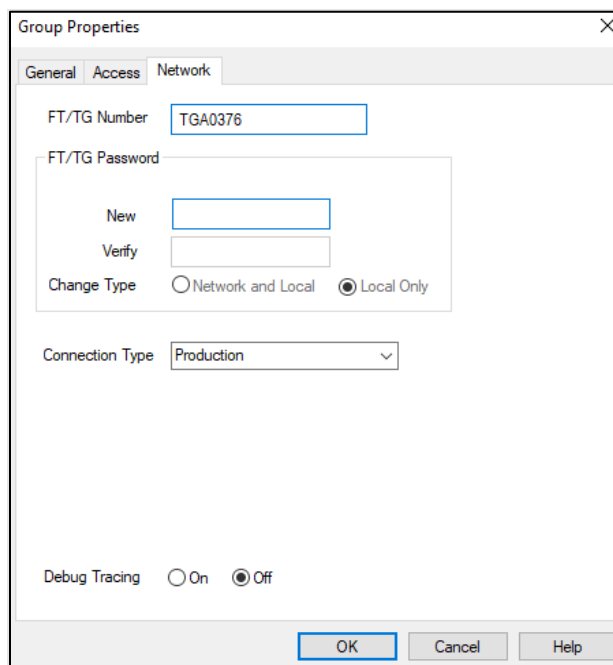
If you reinstall EDconnect but have already established an **SAIG/FTI-SAIG Password**, a **Local Only** password change will synchronize the password within EDconnect to match the password stored by your SAIG/FTI-SAIG mailbox.

Helpful Hints

- All passwords in EDconnect are case-sensitive.
- Be sure to use the same capitalization each time you type your **SAIG/FTI-SAIG Password**.

4.3.2 Performing a "Local Only" SAIG/FTI-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/FTI-SAIG Password** in the **New** text box.
   Note: If you are accessing a new SAIG/FTI-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 the SAIG/CPS Help Desk, 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 FT/TG password changed" appears.
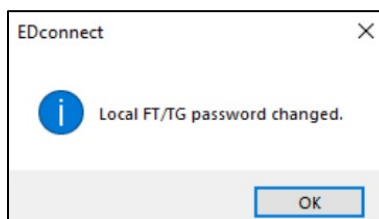
9. Click **OK** to return to the **Security View**.

Helpful Hints

- A **Local Only** password change sets the **SAIG/FTI-SAIG Password** within EDconnect without sending the password change to the SAIG/FTI-SAIG.
- A **Local Only** password change is necessary after your password has been reset by the SAIG/CPS Help Desk, when you move EDconnect to a different PC, or when you install EDconnect on several PCs that share one **FT/TG number** and **Connection Type** but have separate EDconnect databases.
- Your Local FT/TG password must match the SAIG/FTI-SAIG password to transmit successfully.

4.3.3 Performing a "Network and Local" SAIG/FTI-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/FTI-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 "FT/TG Password change request added to Transmission Queue" appears.
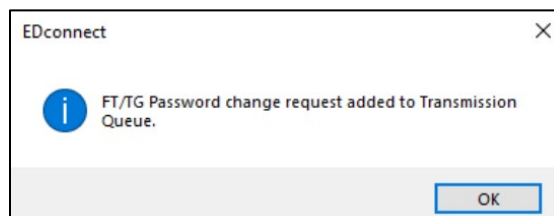
9. Click **OK** to return to the **Security View**.

10. Select **Now** from the **Transmission** menu or select the 'Transmit' icon to send your new password to the SAIG/FTI-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/FTI-SAIG Password** will expire.

4.3.4 Changing your SAIG/FTI-SAIG Password After Help Desk 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 FT/TG password changed" appears.
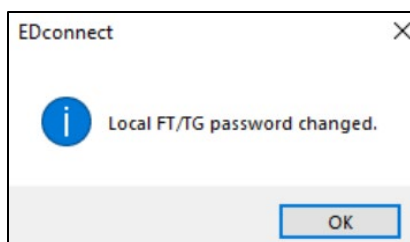
8. Click **OK** to respond to the message. The **Group Properties** dialog will stay on your screen.

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 "FT/TG Password change request added to Transmission Queue" appears.
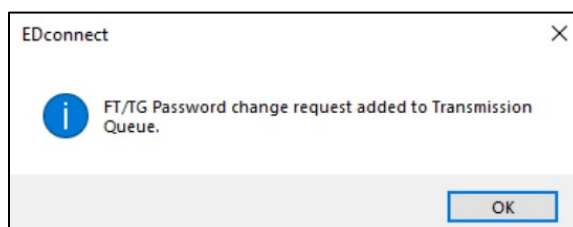
13. Click **OK** to return to the **Security View**.

14. Select **Now** from the **Transmission** menu or the 'Transmit' icon to send your new password to the SAIG/FTI-SAIG.

4.3.5 Changing Your SAIG/FTI-SAIG Password After It Has Expired

Your **SAIG/FTI-SAIG Password** expires every 90 days. You are warned that your **SAIG/FTI-SAIG Password** is due to expire nine days before the expiration date. The expiration date and warning period are set by the SAIG/FTI-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/FTI-SAIG after your password has expired, a message box appears, indicating that your password has expired.
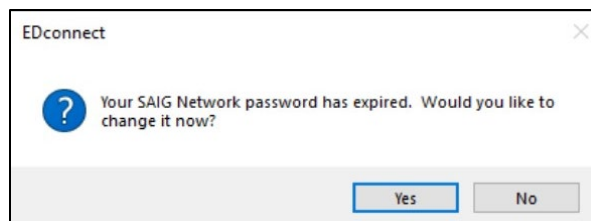
You do not need the SAIG/CPS Help Desk reset your password if you receive this message. The SAIG/FTI-SAIG will allow you to send and receive data as long as you transmit a password change.

To change your **SAIG/FTI-SAIG Password**, click **Yes which will launch the Group Properties dialog displayed on the next page.** After you enter your new **SAIG/FTI-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 the SAIG/CPS Help Desk, the password of your SAIG/FTI-SAIG mailbox will be set to a temporary password which will be provided by the Helpdesk.
- You must perform a **Local Only** password change, changing your password to the assigned password.
- You must then perform a **Network and Local** password change to set your **SAIG/FTI-SAIG Password** to a password of your own choice.
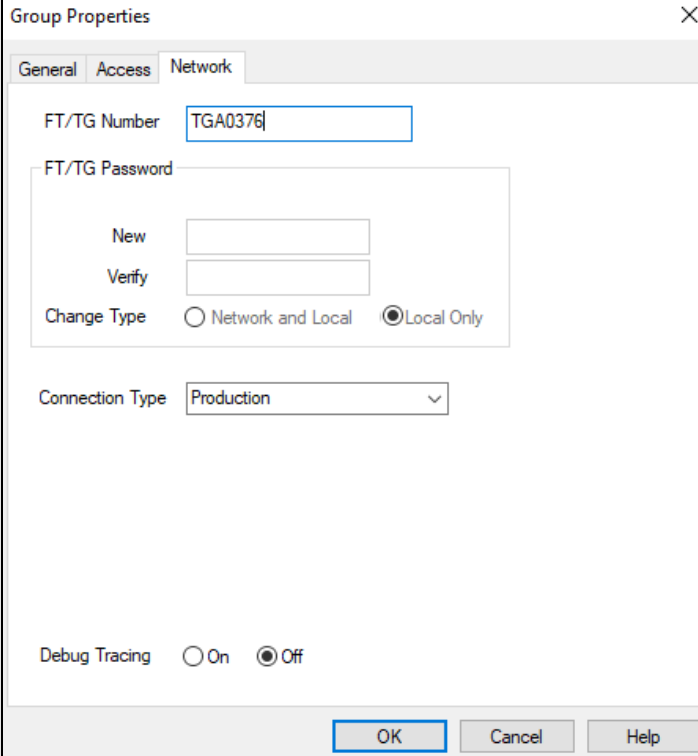
4.3.6 Important Note

For enhanced security, your account will lock after three failed transmissions due to an expired or invalid **SAIG/FTI-SAIG Password.** Users must wait a period of 15 minutes for the account to unlock or contact the SAIG/CPS Help Desk at 800-330-5947 for immediate assistance.

The SAIG/CPS Help Desk must talk directly to the Destination Point Administrator (DPA) or Secondary Destination Point Administrator (SDPA) to verify personal identifiers before resetting your **SAIG/FTI-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/FTI-SAIG Password Change Screen Example

Illustration of the password change screen for the **SAIG/FTI-SAIG Password**:

5. Data Transmission

Before you can transmit data in EDconnect 8.6.1, you must first download a Runtime certificate (RTM file) and tdclient.ini file from FTI-TDCM via http://ftisaigportal.ed.gov.

5.1 Download Certificate (RTM file) from FTI-TDCM

Login to FTI-TDCM (http://ftisaigportal.ed.gov) and navigate to the "**Participant Tab**". Under the "**Security**" subtab, click on the "**Export Runtime**" button. Note the location where the Runtime (.RTM) file is saved, as well as the "**Approval Code**" shown in FTI-TDCM, for use in the import step.

To import the certificate for use by EDconnect, select the **Import Certificate shortcut** in the **EDconnect 8.6.1 folder** on the **Start Menu**.
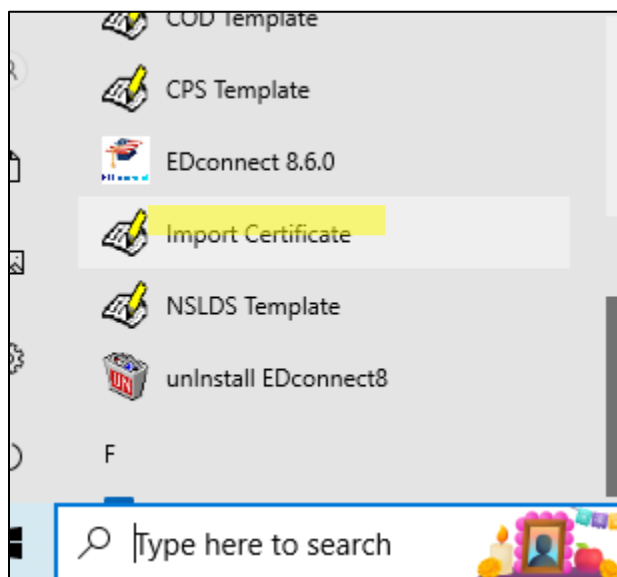
To complete the certificate import process, follow these steps as prompted:
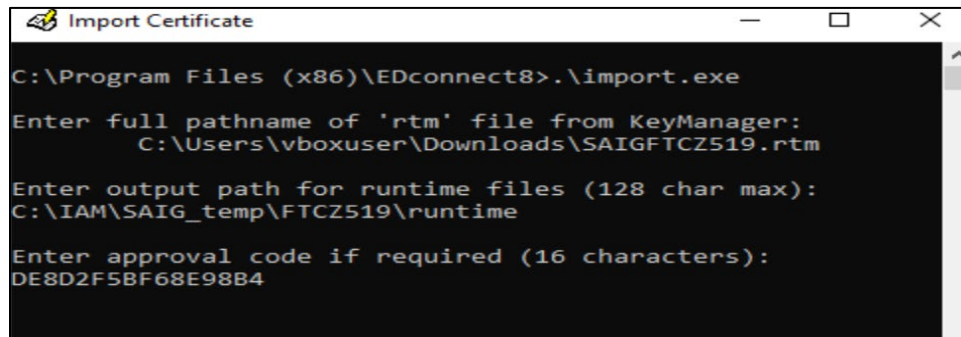
1. At the "**Enter full pathname of the 'rtm' file from KeyManager**" prompt, enter the path and filename of the runtime (.RTM file) that was downloaded from FTI-TDCM.
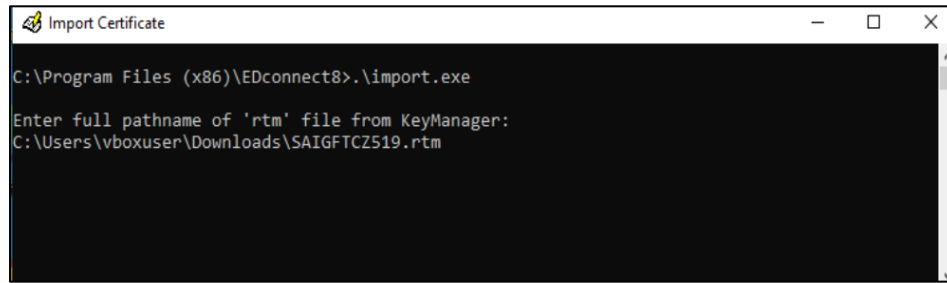
2. At the "**Enter output path for runtime files (128 char max)**" prompt, enter the path to place the extracted runtime files. Place the files under **C:\IAM\SAIG_temp** in the **runtime** folder under the folder that corresponds to the **FT number** for the user, as shown in the screenshot.
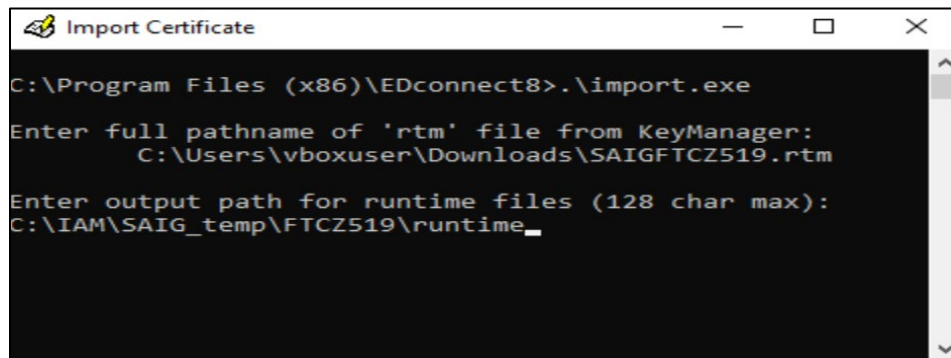
3. At the "**Enter approval code if required (16 characters)**", enter the approval code for the certificate, which is obtained in FTI-TDCM.

4. The Import Certificate tool will show several details during the import, as shown in this screenshot.
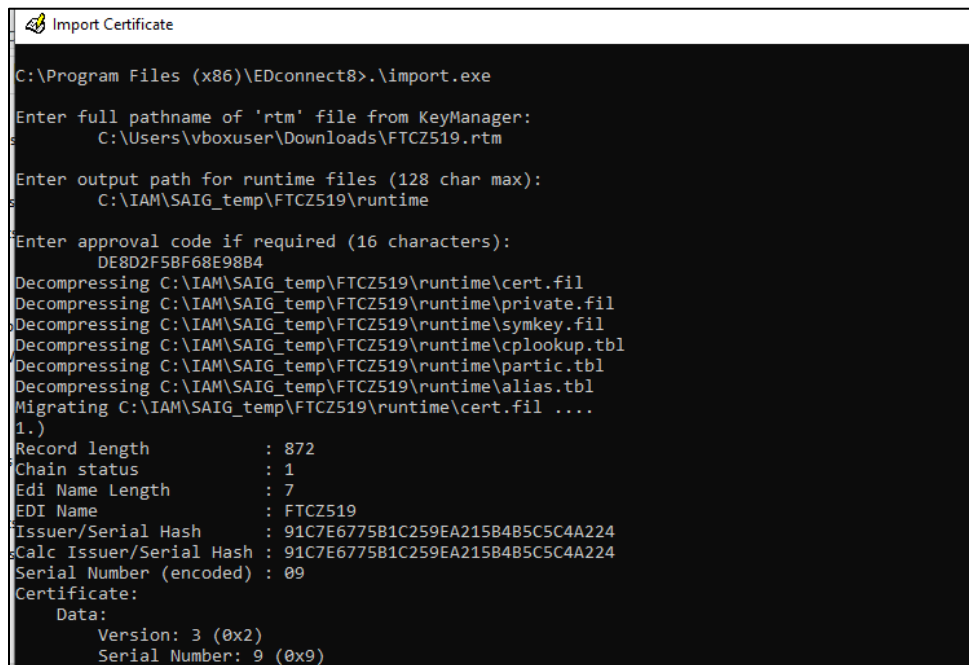

```
Import Certificate

C:\Program Files (x86)\EDconnect8>.\import.exe

Enter full pathname of 'rtm' file from KeyManager:
        C:\Users\vboxuser\Downloads\FTCZ519.rtm

Enter output path for runtime files (128 char max):
        C:\IAM\SAIG_temp\FTCZ519\runtime

Enter approval code if required (16 characters):
        DE8D2F5BF68E98B4
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\cert.fil
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\private.fil
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\symkey.fil
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\cplookup.tbl
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\partic.tbl
Decompressing C:\IAM\SAIG_temp\FTCZ519\runtime\alias.tbl
Migrating C:\IAM\SAIG_temp\FTCZ519\runtime\cert.fil ....
1.)
Record length         : 872
Chain status          : 1
Edi Name Length       : 7
EDI Name              : FTCZ519
Issuer/Serial Hash    : 91C7E6775B1C259EA215B4B5C5C4A224
Calc Issuer/Serial Hash : 91C7E6775B1C259EA215B4B5C5C4A224
Serial Number (encoded) : 09
Certificate:
    Data:
        Version: 3 (0x2)
        Serial Number: 9 (0x9)
```

5. After importing the RTM file, you can verify that the import was successful by selecting the "**Check Certificate shortcut**" in the **EDconnect 8.6.1 folder** on the **Start menu**.
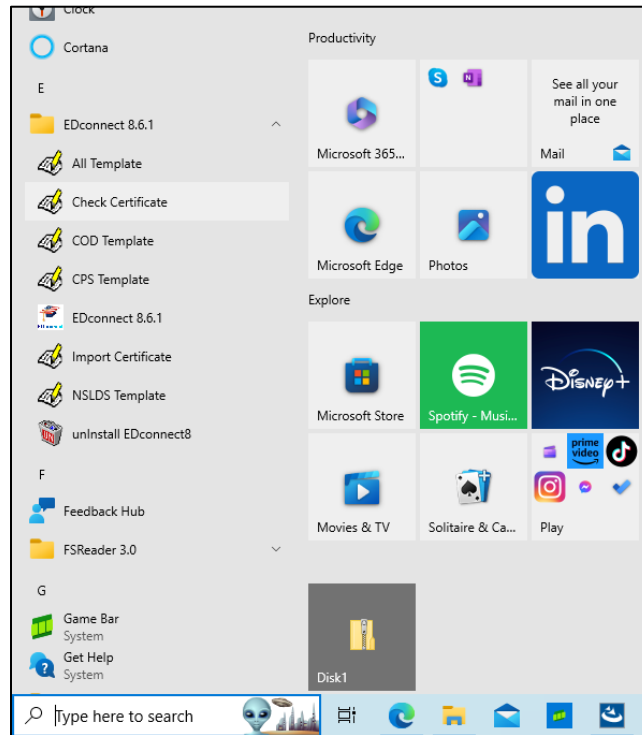
6. At the prompt, enter the path to the installed **runtime**, under **C:\IAM\SAIG_temp** in a folder that corresponds to the **FT number** for the user, as shown in the screenshot.
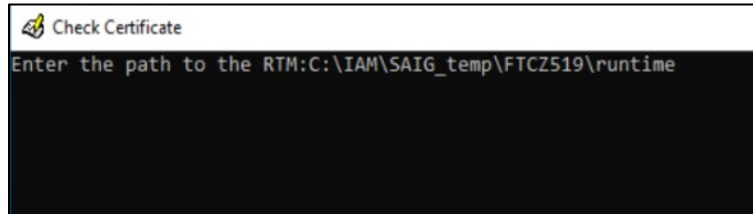
7. The details of the certificate runtime will be shown, as follows.

5.2 Updating the tdclient.ini file

Users must also download the **tdclient.ini** file from the participant security tab in FTI-TDCM by clicking the "**Export INI**" button.

Once the tdclient.ini file is downloaded, place it in the folder under **C:\IAM\SAIG_temp** that corresponds to the **FT number** for the user. For example, for a user with FT number FTCZ519, the file would be placed as shown in this screenshot.
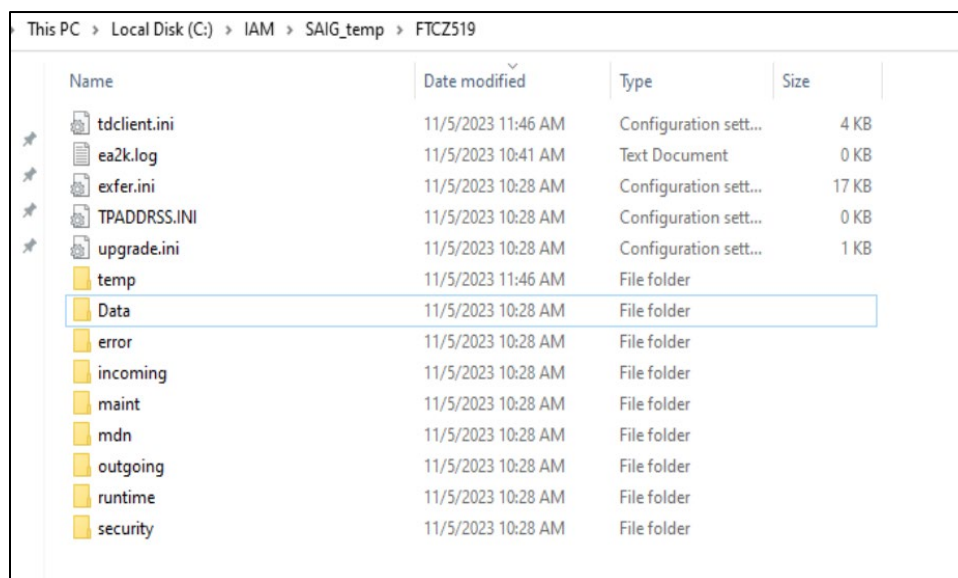
After copying the **tdclent.ini** file to the proper location, open the file using Notepad or another editor of your choice, and make the following changes in the [FTISAIGPORTAL] section:

DHONLY=N
DATA_OVER_COMMAND=Y

NOTE: These changes to the **tdclient.ini** file are **critical** to being able to transmit data in EDconnect 8.6.1.

5.3 Sending and Receiving Data

5.3.1 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.

Important Note: Non-FTI users are only able to send non-FTI data. FTI users cannot send any data using EDconnect.

5.3.2 Receiving Data

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

When EDconnect connects to your SAIG/FTI-SAIG mailbox, it retrieves the processed files placed in your SAIG/FTI-SAIG mailbox by a Title IV Application System and returns them to your PC. FTI users are able to receive FTI data, while non-FTI users are only able to receive non-FTI data.

Helpful Hint

You can send (for non-FTI users) and receive (both FTI and non-FTI users) data as well as perform password changes during the same connection to the SAIG/FTI-SAIG. You must have a Message Class table imported before you can make a transmission.

5.3.3   Data Transmission Menu

The **Transmission** menu on the main menu bar gives you three choices: **Now**, **Later**, and **Test**.
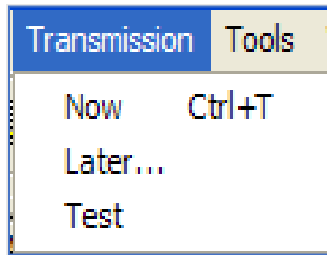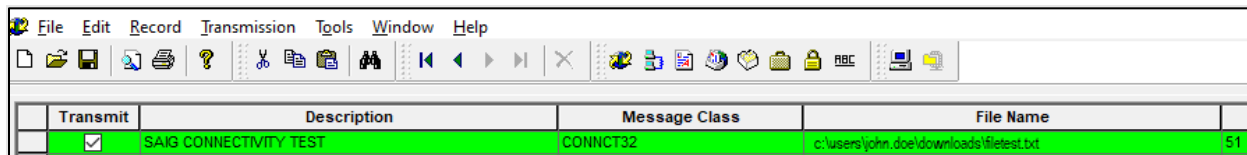
  ◆ Selecting the **Now** option starts a connection to the SAIG immediately. All data queued for sending to the SAIG/FTI-SAIG and properly marked in the **Transmission Queue** are sent. All data queued for receiving from your mailbox and properly marked in the **Transmission Queue** are received, provided 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/FTI-SAIG.
  ◆ Selecting the **Test** option transmits a test file to the SAIG/FTI-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/FTI-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.

5.3.4 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. Below is a partial image of the Transmission Queue.

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.

This PC > Windows (C:) > iam > DATA

folder

Name

CONNCT32.001
CONNCT32.002
CONNCT32.003
CONNCT32.dat
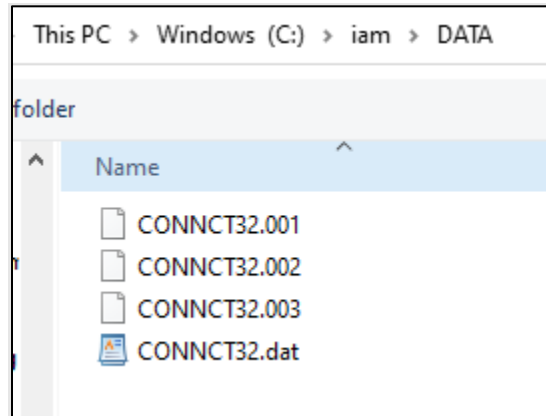
Helpful Hints

- ◆ 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.

5.3.5 TQ Templates

5.3.5.1 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.

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

3. Select a template from the **All Programs| EDconnect8** menu. There are pre-created templates in the EDconnect8 folder on the **Programs** menu. Selecting a template will open EDconnect8.

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 8.6.1.

5.3.6 Activity Log

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

It lists files that have been sent and received, **SAIG/FTI-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.

Activity	Project	Cycle	Description	Message Class	File Name
Transmit			Start of Transmission		
Send	CPS	02-03 Data	02-03 FDR	FDRS03IN	c:\iam\data\atest.txt
Send	CPS	04-05 Data	04-05 PIN DATA REQUESTS	RADD05IN	c:\iam\data\atest.txt

5.3.6.1 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**.

5.3.6.2 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 **Received File** 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.
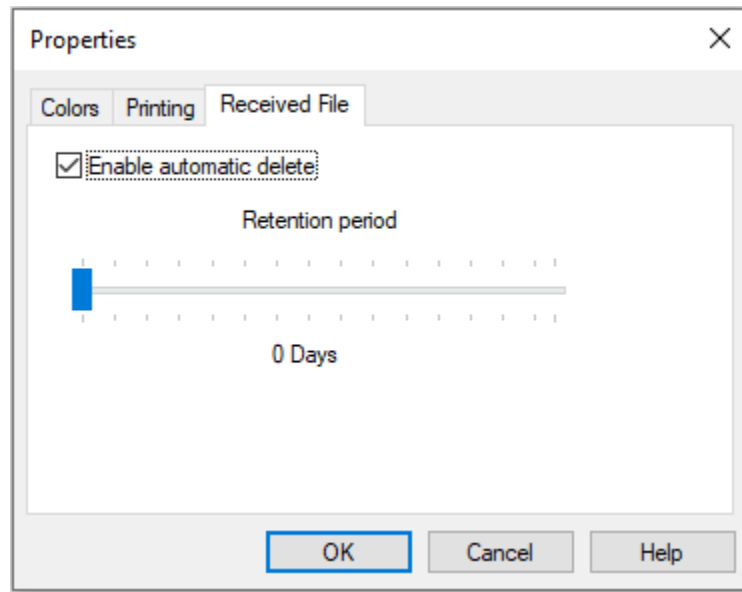
5.3.7   Mailbox Query

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

	Move to TQ	Message Class	Batch Number	Item Number	Description	Sender ID
	☐	MESSAGTB	12062011171724	20120112A00008494692	MESSAGE TABLE DISTRIBUTION	BATCHMB
	☐	CORE12OP	0123456789001234567890	20120112A00008494697	11-12 Errors - Corrections	TG50002
	☐	CORE13OP	0123456789001234567890	20120112A00008494698	12-13 Errors - Corrections	TG50002
	☐	DELQFFOP	0123456789001234567890	20120112A00008494707	NSLDS DELINQ BORROWER REPORT FIXED LENGTH	TG53161
	☐	DELQCMOP	0123456789001234567890	20120112A00008494708	NSLDS DELINQ BORROWER REPORT COMMA DELIMITED	TG53161

5.3.7.1   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/FTI-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/FTI-SAIG mailbox, follow the steps above to perform a new **Mailbox Query**.

5.3.8   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/FTI-SAIG mailbox over the previous ten days.

	Move to TQ	Message Class	Batch Number	Item Number	Description	Sender ID
	☐	AHSLDEOP	0123456789001234567890	20120112A00008494728	AD HOC EXTRACTS	TG50012
	☐	AHSLDSOP	0123456789001234567890	20120112A00008494729	AD HOC QUERY AND PRODUCT DEL	TG50012
	☐	AHSLDEOP	0123456789001234567890	20120119A00008495544	AD HOC EXTRACTS	TG50012
▶	☐	AHSLDSOP	0123456789001234567890	20120119A00008495545	AD HOC QUERY AND PRODUCT DEL	TG50012

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

5.3.8.1   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 the SAIG/CPS Help Desk, 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/FTI-SAIG mailbox by the Application System that processed that item.
- ◆ To restore files older than ten days to your SAIG/FTI-SAIG mailbox, use the **Transaction Delivery Community Manager** (**TDCM**) **Archive View** or contact the SAIG/CPS Help Desk at 800-330-5947. The **TDCM/FTI-TDCM** is available online at **https://saigportal.ed.gov/tdcm** (**SAIG**) and **https://ftisaigportal.ed.gov./tdcm** (**FTI-SAIG**).

The SAIG/CPS Help Desk can restore any file to your mailbox if it is not older than 90 days. Files older than 90 days are archived and cannot be restored.

5.3.9 Message Class Manager View

The Message Class Manager controls the allowable message classes that can be sent and received.

The Message Class Table must be imported to send or receive messages and is updated periodically by FSA. The Message Class table is available on the https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools/edconnect.

Note! EDconnect will automatically import this table once you have established a connection with FSA.

Sample illustration of Message Class Manager

5.3.10 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 Icon	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/FTI-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/FTI-SAIG mailbox.
Received File		Lists data records, by message classes that have already been received from your SAIG/FTI-SAIG mailbox during the last ten days.
Security		Lists **Security Groups** and **User IDs** and controls access to EDconnect and the SAIG/FTI-SAIG.

5.3.11 Import (.imp) files

An .imp file is very large version of a .tqt file. This is the most effective way for an institution to send large batches of records in one transmission. Only users that are set-up as "unattended" users can use .imp files.

All .imp files must be created in a specific record layout in order to transmit successfully. Using an application such as Text pad is recommended to create the records, as they are dependent on the exact placement of information, and Text pad displays this information.

5.3.11.1   Setting up an .imp file

Below are the specific requirements for creating an .imp file.

Header Record

Field Number	Description	Type	Required	Length	Position
1	Serial Number	Numeric	No	4	1-4
2	Return Code	Numeric	No	4	5-8
3	Group ID	AlphaNum	No	50	9-58
4	Unattended User ID	AlphaNum	No	50	59-108
5	Encrypted User Password	AlphaNum	Yes	8	109-116
6	Response File Name	AlphaNum	No	260	117-376

Data Record

Field Number	Description	Type	Required	Length	Position
1	Serial Number	Numeric	No	4	1-4
2	Return Code	Numeric	No	4	5-8
3	Action	Alpha	No (Except when Action is = T)	1	9
4	Message Class	AlphaNum	Yes	8	10-17
5	Fully qualified Path and File Name	AlphaNum	Yes (for sending files only)	260	18-277
6	Batch Number	AlphaNum	No	50	278-327
7*	Mailbox	AlphaNum	No	7	328-334

* Ignored unless Servicer Mode is enabled. Contact the SAIG/CPS Help Desk to enable Servicer Mode if it is applicable to your institution.

Field Descriptions

Serial Number—This field is for positional reference only. No editing is performed on this field, and it is not required. Mainframe systems should use this position to sequentially number the commands in the input file.

Return Code—This field represents the success or failure of processing this command. This field is ignored on input records, so it can be populated or left blank. However, this field will be populated with the return code for this record's activity in the Response File. (See Response File Name below.)

Unattended User ID—This field represents the **Unattended User ID** to use with the processing of this import file. This field is not required. If no **Unattended User ID** is specified for the current user, the user specified in the **EDconnect.ini** file is used. If an **Unattended User ID** is specified, that **Unattended User ID** must be listed in the Group ID that is provided. If no Group ID is specified for the current user, and the **Unattended User ID** is provided, it must be unique across all groups. Note that this is *not* the **User Name** field. The **User Name** field is used for auditing purposes by the Student Aid Internet Gateway.

Group ID—This field represents the **Group ID** to use with the processing of this import file. This field is not required. If no Group ID is specified for the current user, and the **FSA User ID** is provided, it must be unique across all groups. If neither **FSA User ID** nor Group ID is specified, a password must be provided for the user importing the file.

Encrypted Password—This field represents the password to be used with the specified or current user name. In EDconnect 8.6.1, the password is encrypted for extra security. The encrypted password can be found on the User Profile in EDconnect. If no FSA User ID or Group ID is specified, this password should match the user specified in the Edconnect.ini file. If the password does not match, the import process is aborted, and the appropriate return code is written to the response file. The encrypted password can be found by going to the Security View screen, User, Properties tab, under the Verify Password field.

Passwords can contain special keyboard characters, such as @, #, and $, but because some computer platforms and programs use special characters as command characters, we recommend avoiding % (percent), ^ (caret), & (ampersand), < (less than), > (greater than), and | ("pipe" symbol). Do not use \ (backslash), / (forward slash), " (double quotation mark), or ? (question mark).

Response File Name—This field represents the file to which EDconnect writes the return codes associated with each command record. This field is not required and if not completed, a file called TQ.ERR in the current EDconnect directory is created. This response file contains an exact copy of the input file with the return code column filled in with the result of executing the command. This field must be a valid long file name if present.

Action—This field represents the action to perform with the current record. "T" is currently the only valid action value. A command record with a "T" in the action column will immediately transmit the batch-mode added contents of the **TQ** and record all transmission activity in the **Activity Log**. Note that only records within the **TQ** that have

the "Batch Mode" field set to **True** are transmitted during an import transmission. The "T" record must be the last record in the import file if present at all. Only one "T" record should be present in a given import file. If the action column contains a "T", all fields on the same record following "Action" are ignored. Leaving the action space empty will set the transmission to "Manual", and after loading the batch mode contents, the user will transmit the batch-mode added contents using the "Transmit" feature.

Message Class—This field represents the message class to use for this command. This field is used to cross-reference the message class database to populate the majority of the **TQ** records. This field is required for all data records that do not have an Action Type of "T".

File Name—This field is required for requests to Send files. It represents the name and the path of a file to transmit to the Student Aid Internet Gateway. However, this field should be blank for requests to receive files. Only the Receive path in the Unattended User ID properties determines where a file is received. If the Receive path in the Unattended User ID properties is blank, then the path of the Message Class, as listed in the Message class Manager, determines where a file is received.

Batch Number—This field is a pass-through value that each Application System can utilize as it wants. There is no editing done on this field.

Mailbox—This is a restricted use field and can only be used by Data Providers within the Student Aid Internet Gateway. This field will be rejected if used and the proper setup has not been completed. If you are a data provider and want to use EDconnect, please contact the SAIG/CPS Help Desk.

This field is used to indicate to which mailbox data is to be sent on Send records. Validation of this field is limited to checking the length, as a complete list of all mailboxes within the SAIG/FTI-SAIG system is not available until a connection with the SAIG/FTI-SAIG is established. If this field is left blank, the import process defaults the mailbox value to the corresponding mailbox specified in the **Message Class Manager** table.

Return Codes

Below is the list of possible return codes you may receive if your .imp file is not created correctly. These will appear in the error log, the location and name of which is designated in the Response File Name field.

Value	Description	Corrective Action
0000	Command Successful	None
9999	User Error—The supplied user could not be loaded	1. Ensure that the specified user exists in the EDconnect **Security View**. 2. Execute a disk verification program (Scandisk).
9998	Transmission Error—The import process was unable to completely finish the requested import transmission process.	1. See the EDconnect Help system for connectivity problem resolution. 2. Review **Activity Log** for possible causes.
9997	General Error—A general error has occurred.	Contact CPS/SAIG Technical Support.
9996	Duplicate—A record was requested to be added to the TQ that was already present.	Remove the duplicate request from the import file or from the existing **TQ**.
9995	Unknown Action—A record with an unknown action type was submitted.	Validate that all records in the import file have a valid action type.
9994	Password Error—An incorrect password was given for the user.	Verify that the password being used is valid for the specified user.
9993	Access Error—The user does not have access to perform this operation.	Verify that the security group in which the user belongs has update rights to the **TQ**.
0006	Message Class—Invalid value.	Verify that the message class import record exists in the Message Class database.
0007	File name—Invalid value.	Ensure that the file path is correct, and that a corresponding file exists in the specified directory.
0009	Incorrect Relationship b/t ID & Message Class	Verify the relationship between the ID and Message Class is correct.
0010	Batch Number—Invalid value.	Ensure a correct length for the Batch Number.
0012	Mailbox—Invalid value.	1. Ensure that a correct length mailbox is specified. 2. If adding a send record, ensure that the mailbox is specified in either the record or the message class database for the associated message class.
0013	Missing TG/FT Number	Applies to Servicer Mode only. Verify that the TG/FT number is in the correct spaces of record layout.
All others		Contact CPS/SAIG Technical Support.

Below is a partial image of a correctly set up .imp file.
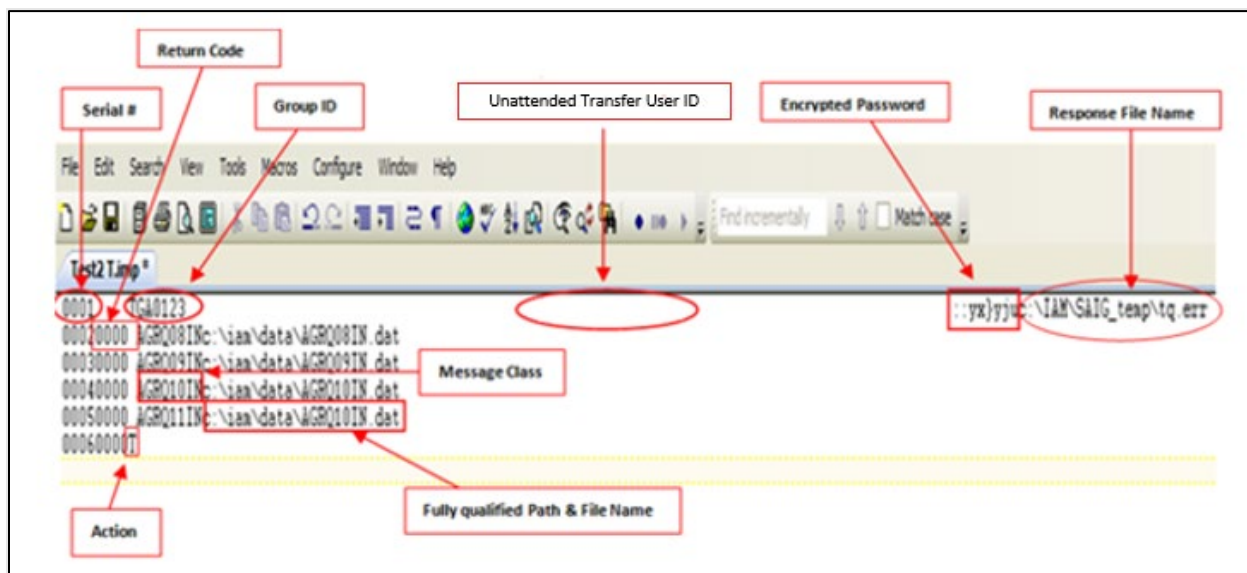
The 'T' in the bottom line indicates that this is an automatic file. By placing the 'T' there, this will bypass the Security Authentication process and transmit automatically.

The other option is to leave that space empty. This creates a manual transmission, meaning that after the Security Authentication process is bypassed, the 'Transmit' icon or the 'Now' option in the Transmission menu must be selected by the user.

5.3.12 Unattended Transfer User ID and .imp files

For SAIG usage, the unattended transfers are normally used for sending large .imp files during off-peak hours to avoid slowing down the system. Only users marked as **unattended users** can use .imp files. For the purpose of this document, these users will be referred to as **Unattended User IDs.**

***NOTE**: FTI Users (FTI-SAIG) cannot perform unattended transfers. This is only applicable to non-FTI (SAIG) users.*

In the Security view, the user that will be making the unattended transfer must be marked as an unattended user, making it an **Unattended User ID.** Any username can be created for an **Unattended User ID**; it does not have to be an **FSA User ID**. **Unattended User IDs** will not be visible in the Security Authentication screen or able to log into EDconnect following a transmission in order to verify success.

An **FSA User ID** can be marked as an unattended user by checking the box in the User Properties dialog box, as shown below. Once this box is checked, the password fields will appear, allowing the **FSA User Password** to be entered and stored.

***NOTE:** Since an **Unattended User ID** is not able to log into EDconnect, an **FSA User ID** marked as unattended will not be able to log in. If Unattended User is marked accidently, a different **FSA User ID** will have to login in order to **uncheck** the **Unattended User ID**. It is highly recommended to create a username different from your **FSA User ID** to use as an unattended user.*

5.3.12.1 Loading .imp files into the TQ and Manually Transmitting as an Unattended User

For the manual transmission, you will need your .imp file to have the last link as blank.

> **Note –** the last line reads 00060000. There is no 'T' following the number. This means a user will have to physically select the 'Transmit' icon or the 'Now' option under the Transmission menu.
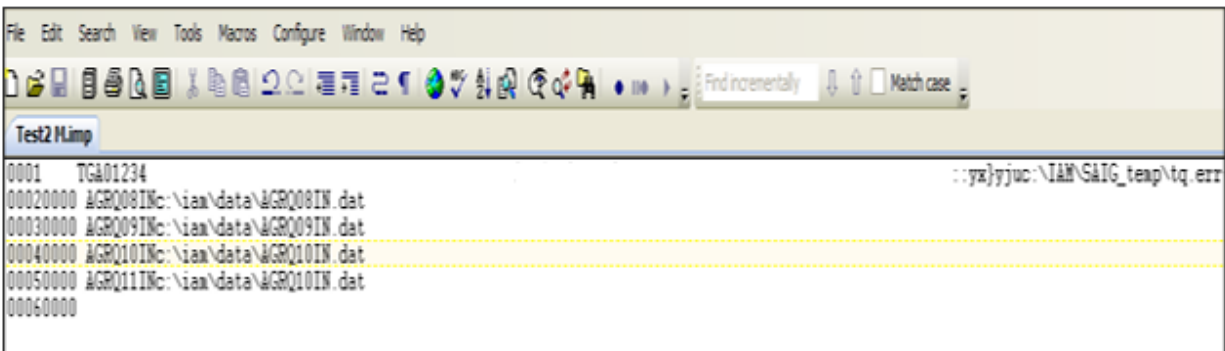
1. On your desktop, where your EDconnect shortcut is, right-click on the shortcut and select 'Create Shortcut'. A second shortcut icon should appear. You can rename this as '.imp shortcut'.

You will need to add a string to the Target path where the .imp file is stored-in this case, it is in the C:\IAM\SAIG_temp\ directory. The Target path will display where your Edconn852.exe file is stored. In this example, the Edconn852.exe is in the C:\ProgramFiles/Edconnect8 directory.
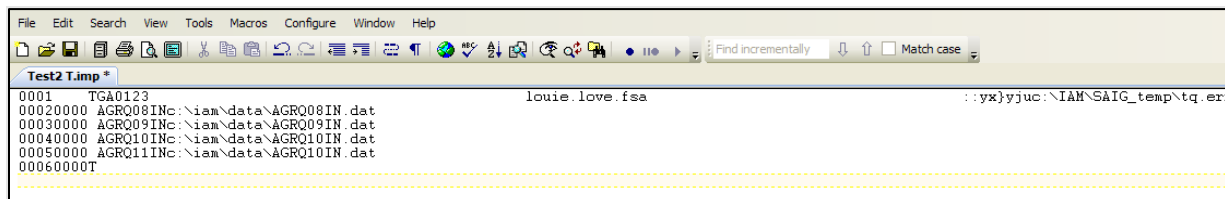
2. Right click on the '.imp shortcut' icon and select Properties. At the end of the Target path, enter "C:\IAM\SAIG_temp\FISAP.imp" so that it reads ""C:\Program Files (x86)\EDconnect8\EDconnect8.exe" " <path to IMP file>". Click **Apply**, then **OK**. For example, " "C:\Program Files (x86)\EDconnect8\EDconnect8.exe" C:\temp\test_notrans.imp
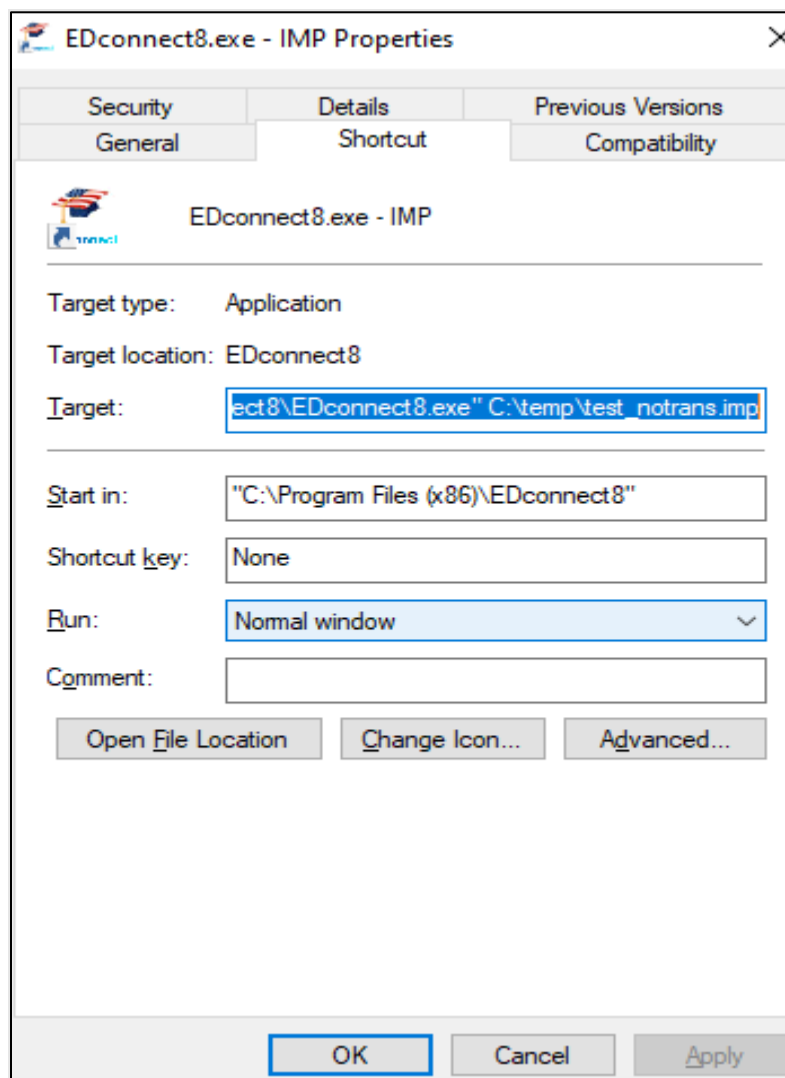
3. Double-click the '.imp shortcut' icon. The EDconnect logo will appear, and then minimize to the task bar. Click on this to view EDconnect and verify that you are looking at the Security View.

4. Click on the **TQ icon** and verify that the files loaded.

5. Click the '**Transmit'** icon or the '**Now'** option in the **Transmission** menu.

6. Verify transmission is successful. You also double check this looking at the **Activity Log**.

5.3.12.2   Loading .imp files into the TQ and Automatically Transmitting as an Unattended User

- For the manual transmission, you will need your .imp file to have an extra 'T' in the last line.
  Note in the example, the last line reads 00060000T. This 'T' is the designator for an automatic, unattended transmission. This also means that a user does not have to physically select the 'Transmit' icon or the 'Now' option under the Transmission menu.

- On your desktop, where your EDconnect shortcut is, right-click on the shortcut and select 'Create Shortcut'. A second shortcut icon should appear. You can rename this as '.imp shortcut'.
- You will need to add a string to the Target path where the .imp file is stored-in this case, it is in the "C:\IAM\SAIG_temp\" directory. The Target path will display where your EDconnect8.exe file is stored. In this example, the EDconnect8.exe executable is in the C:\ProgramFiles (x86)/EDconnect8 directory.

1. Right click on the '.imp shortcut' icon and select Properties. At the end of the Target path, enter "C:\IAM\SAIG_temp\FISAP.imp" so that it reads "C:\Program Files (x86)\EDconnect8\EDconnect8.exe" "C:\temp\test_notrans.imp". Click **Apply**, and then **OK**.
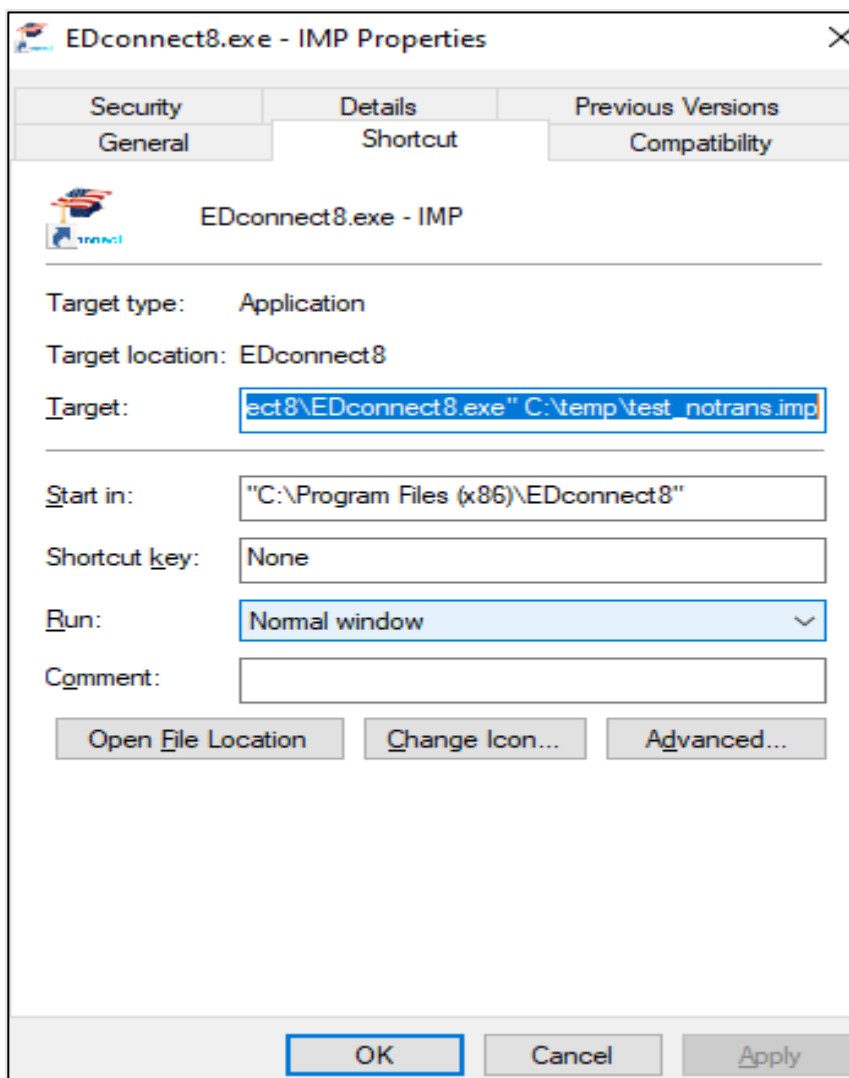
2. Double-click the '.imp shortcut' icon. The EDconnect logo will appear, and then minimize to the task bar. Click on this and verify that the transmission process has begun.

3. Verify transmission is successful. You can also double check this looking at the **Activity Log**.

6. Using the EDconnect Test Environment

NOTE: FTI-SAIG does not have a test environment. This section applies only to SAIG users. In order for users to access the test environment, a system will need to set up a designated "test" security group. Once the test Security Group, or test TG mailbox, has been created, the **Connection Type** will need to be redirected from **Production** to **Test**.

To redirect a **Connection Type** to the test environment, users will need to follow the steps below:

1. Set up a new dedicated "test" security group. This test group should _not_ be used in the production environment. All testing should be conducted on the test environment using the designated "test" security group the user creates.
2. Next reset the test account user password. To connect to the test environment, users will need to reset their test account passwords.

   Note: User passwords on the production and test environments are not in sync. Users must contact the SAIG/CPS Help Desk to reset their test account passwords. If you have not used the test environment in the last 90 days, your password has expired and will need to be reset.

3. 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 (Pad Lock icon) from the main EDconnect toolbar.
4. Right-click on the Security Group or TG Mailbox you wish to test and select Properties from the menu.
5. Next, select the Network tab shown on the Group Properties screen.
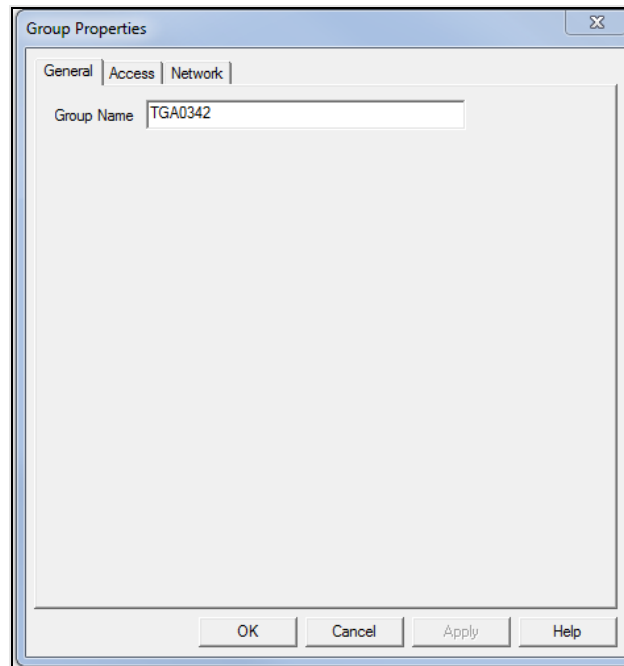
6. Once you are on the **Network** Group Properties screen, change the **Connection Type** from **Production** to **Test**. Next, select **Finish**.
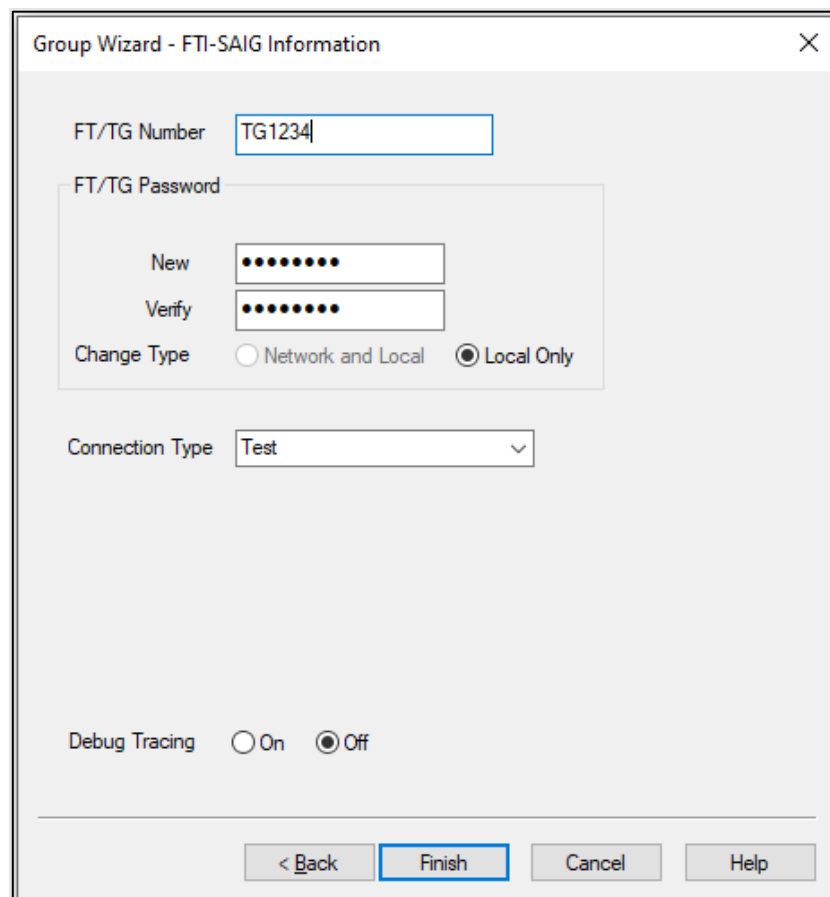
7. System should receive the EDconnect warning message that reads "Your Network Connection Type is set as Test. Any files you send or receive will be transmitted through the test system and will not be processed."
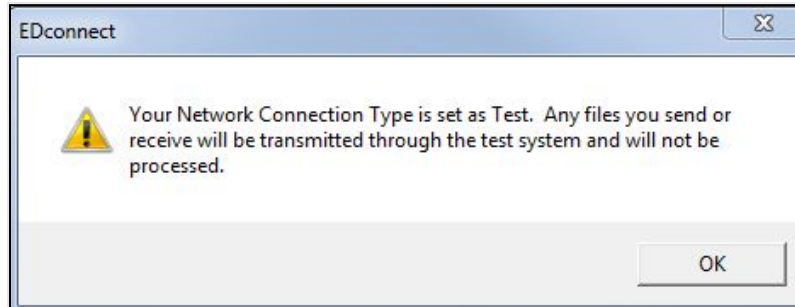
7. EDconnect Error Codes

If a transmission fails, EDconnect asks you to review the **Activity Log** for details. In most cases, the error message in the **Activity Log** consists of an error number followed by a brief explanation of the error.

The first section of the *EDconnect 8.6.1 Error Code List* provides descriptions of **Numerical Errors** you may receive and their possible resolutions. Some of the resolutions may require the help of your technical support staff or network administrators.

Under certain circumstances, you may receive non-numerical error messages or other program errors. These are described in the **Non-numerical Errors** section of the list.

Entries are arranged alphabetically unless the most common cause of a particular error is noted first.

Security Authentication Errors occur when a user tries to login to EDconnect without the proper credentials. You will need your assigned **FSA User ID** and **Password**, and **One-Time Password,** if applicable, from FSA before you can login to EDconnect.

The instructions assume that the EDconnect program files have been installed to the default **C:\Program Files (x86)\EDconnect8** folder. The program files will typically be located on the local hard drive even if the EDconnect database is on a network drive. If EDconnect has been installed to a different folder, adjust the instructions accordingly.

Before contacting the SAIG/CPS Help Desk (800-330-5947, or by e-mail at **CPSSAIG@ed.gov**) for assistance with transmission problems, make sure that you are able to access the Internet. EDconnect uses your existing Internet connection. If you are unable to view Web pages in your Web browser, EDconnect will not be able to connect to the Student Aid Internet Gateway (SAIG/FTI-SAIG).

You may also want to try one or more of the following to resolve transmission problems:

- Exit EDconnect, log back in, and try another transmission.
- Restart your computer and try another transmission. If you connect to the Internet through a Local Area Network (LAN), restarting your computer may establish a better connection.
- If you connect to the Internet through a modem and an Internet Service Provider (ISP), disconnect from the Internet and connect again. Try another transmission.
- Wait and try another transmission later. If you have been successfully sending and receiving files using EDconnect, many transmission errors (Error -1 and Error 4xx, in particular) will resolve themselves.

*Note: After a failed transmission, a **Mailbox Query** will usually report that your "Mailbox is empty." This does not mean that your files have been lost. A successful transmission is required before a **Mailbox Query** will accurately reflect the contents of your SAIG/FTI-SAIG mailbox.*

*Under normal circumstances, you will not lose any files due to transmission failures. The EDconnect **Activity Log** can help you determine which files you have successfully received.*

7.1   Numerical Errors

An error code may be preceded by a minus sign, as in **Error -1**. The presence or absence of a minus sign does not change the meaning of the numerical codes listed below.

Note: The SAIG/CPS Help Desk cannot provide specific information for configuring firewalls and proxy servers, although we may be able to offer general assistance.

7.1.1   Error -1

Error -1 indicates that EDconnect cannot connect to the SAIG/FTI-SAIG. You will receive **Error -1**, for example, if your Internet connection is not responding or if a firewall is preventing EDconnect from accessing the Internet.

Listed below are some of the possible causes of **Error -1**.

7.1.2 Error 2

Problem	Solution
Inadequate permissions or settings	You may not have the necessary permissions or access rights on your workstation or network to transmit with EDconnect. Read, write, and modify rights are required to the local drive and network location of the EDconnect database file "Edconn8.mdb" if applicable. Check with your technical support staff. Have one of your network technicians log into your workstation as an administrator and try a transmission. If the transmission is successful, the technician will need to change your permissions or access rights.
Internet connection is not working	Make sure you are able to view Web pages in your Web browser. If you are unable to access the Internet, EDconnect will not be able to connect to the SAIG/FTI-SAIG.
Local Area Network (LAN) connection is not plugged in	Make sure the LAN cable is connected to your workstation. If it is not plugged in, plug the cable back into the network card in your workstation.
Recreate your firewall, proxy server or traffic shaper rules	Contact your IT department to see if a network technician can delete any references or rules regarding EDconnect using Port 26581 to access saigmailbox.ed.gov, including a defined "host" for the IP address of saigmailbox.ed.gov; then recreate these rules.
Restart your computer	If you access the Internet through a LAN, rebooting your computer may help resolve **Error 1**. Restarting your computer will establish a new connection to your network.
Port 26581 is closed by a firewall	Port 26581 must be open for outbound TCP/IP transmissions and enabled for FTP sessions, and you will need to be able to connect to saigmailbox.ed.gov. If you have never successfully transmitted with EDconnect, contact your network administrators to see if you are behind a firewall.
Proxy client not installed	**Error -1** may occur if a proxy server is running on the network but there are no proxy clients on the workstations using EDconnect. Installing the proxy client on any workstation that uses EDconnect may allow transmissions to go through.
Proxy server is not configured correctly	If you have a proxy server, port 26581 must be open for outbound TCP/IP transmissions and enabled for FTP sessions. Your network administrators may need to add rules to the proxy filters. Common proxy servers include WinProxy, MS Proxy Server, WinGate, and BorderManager (Novell). Product vendors may be able to provide specific information about proxy setup.
Temporary problem with the SAIG	Occasionally, there may be a momentary disruption of the SAIG, causing you to receive **Error -1**. If you normally do not have trouble transmitting with EDconnect, the problem will usually resolve itself in a short time. Try another transmission later. You may want to wait until after peak SAIG network demand, which is between 8:00 a.m. and 10:00 a.m. Central Time.
Workstation has no firewall client	If your network has a firewall, the firewall may require a client on workstations that use EDconnect. You may receive **Error -1** if the client is not installed. Your technical support staff should install the firewall client, if necessary, on workstations that use EDconnect. The firewall vendor may be able to provide technical assistance.

Error 2 occurs when EDconnect cannot establish an FTP session.

Problem	Solution
Error 2 occurs immediately upon transmitting	To resolve the error, confirm all of the following subdirectories exist under the C:\IAM\SAIG_temp directory:
	Data, Error, Incoming, Maint, Mdn, Outgoing, Runtime (which will contain the subdirectory "ign"), Security
	Temp (which will always contain files)
	Should any of these directories not exist, please manually recreate them, or reinstall EDconnect.
	Next, check that you have read/write/modify permissions to these directories as they are all required. You may need to contact your technical support staff for assistance.
	Note: This error can also occur when EDconnect cannot establish an FTP session. See **Error -1** for possible solutions.

7.1.3 Error 3

Error 3 occurs during a transmission and prevents files from being sent or received.

Problem	Solution
Error 3 occurs during a transmission and prevents files from being sent or received.	Users may not have the necessary permissions to receive or send files from a directory. For example: • User may not have read/write/modify permissions • User may have read-only permissions • User lost connection to their network drive If experiencing this issue, contact your technical support staff to assist. Receiving files to a directory with an apostrophe in the name. User is without read/write/modify permissions to the C:\IAM\SAIG_temp folder. Contact your technical support staff to assist. To verify or modify the current Send or Receive directory : • Go to the Security View in EDconnect by selecting File > New > Security View. • Right-click the FSA User ID. • Click Properties. • Click Directories. • Click the down arrow next to Database and select Receive or Send. • The current directory for each will be listed in the box below.

7.1.4   Error 4xx

Error 4xx (the "xx" can denote any number combination) is the result of a slow network connection, which may be due to problems on your network or unusually high network traffic. If you have been transmitting successfully with EDconnect, **Error 4xx** is usually a temporary problem that will resolve itself. Waiting and trying another transmission later will frequently solve the problem without any further action on your part.

Listed below are some of the possible causes of Error 4xx.

Table 3: Error 4xx

Problem	Solution
General connectivity problems	• Your network may be running slowly or dropping its connection to the Internet. Check with your technical support staff to see if there are problems with your network connection. • Unusually heavy traffic on your local network may cause **Error 4xx**. If you only experience **Error 4xx** at certain times of day, check with your network administrators to see if those times coincide with peak network demand. • Unusually heavy traffic on the SAIG may cause **Error 4xx**. Try another transmission later. Peak SAIG/FTI-SAIG usage is often between 8:00 a.m. and 10:00 a.m. Central Time. If you access the Internet through a LAN, rebooting your computer may help resolve **Error 4xx**. Restarting your computer will establish a new connection to your network.
You may have too many programs running	See if closing some programs will stop the error or increase transmission speed.
Your network uses software to set priorities for Internet connections or to limit Internet access	Programs that set priorities for Internet traffic can trigger this error. If the priority for EDconnect is set too low, EDconnect may "time out" with either **Error -1** or **Error 4xx**. Any program that filters Internet packets or scans files during a transmission may interfere with EDconnect. Check with your network administrators. They may want to disable these types of programs temporarily to see if the programs are causing the problem.
Error 422	This error results from the DHONLY value in the tdclient.ini file being set incorrectly in the [FTISAIGPORTAL] section. The value should be set to N. You will also receive error 422 if the runtime certificate files are not imported into the proper location, or if the User ID does not match between the RTM and the tdclient.ini file.

7.1.5   Error 5xx

Listed below are some of the possible causes of Error 5xx.

Table 4: Error 5xx

Problem	Solution
Error 530 "Please see the EDconnect error codes listed in the EDconnect installation and User Guide for further information."	If you receive **Error 530**, you will need to confirm that the TG number you are using to transmit is the correct FT/TG number. You can check by selecting **File**, **New**, **Security View** from the EDconnect menu bar, right-clicking on the *group* (not the *user*) your FSA user ID is under, choosing **Properties**, and clicking on the **Network** tab of the Group Properties dialog box. The FT/TG number field is at the top of the tab. If the TG number is correct, your FT/TG password (SAIG/FTI-SAIG network password) is incorrect, and you will need to call the SAIG/CPS Help Desk to have your password reset. In order to reset your password, CPS/SAIG Technical Support requires the Social Security Number and date of birth of the Destination Point Administrator assigned to the FT/TG number. Additionally, users may receive an Error 530 in the following scenarios: • **Scenario 1:** A user switches between profiles with mailboxes assigned to the Prod and Test environments. *Example 1:* An EDconnect user is logged into group mailbox TG50000, which is assigned to the Prod environment. The user then logs in to group mailbox TG22222, which is assigned to the Test environment, via the Security View. When the user attempts to transmit from TG22222, EDconnect fails to transmit and produces Error 530. *Example 2:* A user is logged into group mailbox TG50000, which is assigned to the Prod environment. The user then logs in to group mailbox TG50000, which is assigned to the Test environment, via the Security View. When the user transmits from TG50000 on ProdT, the transmission fails with Error 530. • **Scenario 2:** Changing a mailbox password outside of EDconnect (i.e., through TDCM or the Help Desk) requires passwords to be synchronized depending on how EDconnect was installed *(i.e., a network install with a shared edconn.mdb will require each group to update the password).* *Example 1:* Edconn.mdb file is shared by all EDconnect users on the same network. *User1 from TG50001, Group A, changes password on TDCM.* *User2 from TG50001, Group A, cannot transmit* **User2 will not be able to transmit until someone from group A executes a local password change in EDconnect.** *Example 2:* Edconn.mdb file is installed on a local machine. *User1 from TG50001 changes the network password from their machine.* *User2 from TG50001 receives Error 530 when transmitting from their machine.* **User2 must execute a local password change in order to synchronize and transmit from their machine.** • **Scenario 3:** The FT/TG number entered in your group is inactive or was entered incorrectly in the Group Properties dialog box (E.g., "50001TG" was entered instead of "TG50001").

Error 531 "Your SAIG network password has expired."	If you receive **Error 531**, you need to transmit a new SAIG/FTI-SAIG password. This error code appears in the Activity Log or the More window of the Transmission screen. Following the failed transmission, EDconnect asks if you would like to complete a SAIG password change. If you select **Yes**, the program takes you to the appropriate network wizard security screen and walks you through the password change. You will need to perform another transmission in order to transmit the new password.
	See **Error 536**, below, for SAIG password rules.
	Please note that performing a Network and Local SAIG/FTI-SAIG password change does not change your user password. "Local," in this context, refers to the fact that EDconnect stores the SAIG/FTI-SAIG password locally (i.e., within the database).
Error 535 "You are attempting to reuse a previously used TG Password. Please select a new TG Password."	Your network password cannot be the same as any of the five network passwords you have used most recently.
Error 536 "Your FT/TG password does not meet the minimum criteria. Please see the EDconnect error codes listed in the EDconnect Installation and User Guide for further information."	EDconnect has specific rules for SAIG/FTI-SAIG passwords: • The password must have a minimum length of 15 characters and must contain each of the following four types of characters 　○ English uppercase letters (A-Z) 　○ English lowercase letters (a-z) 　○ Westernized Arabic numerals (0-9) 　○ and non-alphanumeric special characters, specifically (!,@,#,$,&,*) • The password cannot contain any words that are easily guessed like dictionary words, names, or acronyms • The password must contain at least four (4) alphabetic characters, and • The password cannot contain three (3) or more identical characters in a row.
Error 537- "You have exceeded the maximum number of attempts to log in and your account has been locked. Please call CPS/SAIG Technical Support at 800/330-5947 to have your account unlocked."	For enhanced security, after three failed transmissions due to an invalid SAIG/FTI-SAIG password, your SAIG/FTI-SAIG account will be locked. After 15 minutes, the lock will expire, and you can try again. If you need to call the SAIG/CPS Help Desk to reset the password, the Help Desk requires the Social Security Number and date of birth of the Destination Point Administrator assigned to the FT/TG number.

Error 540 - "Either the FT/TG number or existing FT/TG password you provided was incorrect. Please verify accuracy of information and resubmit."	The wrong password was entered. Re-enter the password.

7.1.6 Error 10

Table 5: Error 10

Problem	Solution
"**No networks defined**" in the **tdclient.ini file**	**Error 10** usually indicates that EDconnect was not installed correctly. Back up the database (**EDconn8.mdb**) and uninstall EDconnect. Perform a full installation. Replace the blank **EDconn8.mdb** with the database you backed up. Please call the SAIG/CPS Help Desk for assistance if necessary.
Inadequate permissions or settings	You may not have the necessary permissions or access rights. Read, write, and modify permissions are required to the local drive, including the C:\IAM\SAIG_temp\ directory, and to the network location of the EDconnect database file "Edconn8.mdb" if applicable. Check with your technical support team to confirm your permissions or have a network technician log into your workstation as an administrator to try a transmission. If the transmission is successful, the technician will need to change your permissions or access rights.

7.1.7 Error 13

Table 6: Error 13

Problem	Solution
Inadequate permissions or settings	You may not have the necessary permissions or access rights on your workstation or network to transmit with EDconnect. Read, Write, and Modify permissions are required to the local drive, including the C:\IAM\SAIG_temp\ directory, and network location of the EDconnect database file "Edconn8.mdb". Check with your technical support staff or have a network technician log into your workstation as an administrator and try a transmission. If the transmission is successful, the technician will need to change your permissions or access rights.
The "list.fil" file is in use by another program.	During testing, SAIG encountered this error when the "list.fil" file was open in another program during a transmission.

7.1.8 Error 15

Table 7: Error 15

Problem	Solution
Inadequate permissions or settings	You may not have the necessary permissions or access rights on your workstation or network to transmit with EDconnect. Read, Write, and Modify rights are required to the:\IAM\SAIG_temp\ directory, including to the Tdclient.ini file that is within this directory. Check with your technical support staff. Have one of your network technicians log into your workstation as an administrator and try a transmission. If the transmission is successful, the technician will need to change your permissions or access rights. If the tdclient.ini file is missing from the C:\IAM\SAIG_temp directory, reinstall EDconnect.

7.1.9 Error 34

You will receive **Error 34** if there is not sufficient free space on the drive on which the **Send** and **Receive** folders are located. Make sure the drive has enough free space.

7.1.10 Error 70

EDconnect may be trying to access a file or folder on a network drive that another user is also trying to access. Restart your computer and try the transmission again.

7.1.11 Error 73

Error 73 indicates that EDconnect cannot connect to the SAIG if your Internet connection is not responding or if a firewall is preventing EDconnect from accessing the Internet.

Verify that the DATA_OVER_COMMAND entry in the tdclient.ini file in the [FTISAIGPORTAL] section is set to Y. See Error -1 above for some additional possible causes.

7.1.12 Error 103

Restart your computer and try another transmission. If you continue to get **Error 103**, back up your EDconnect database (**EDconn8.mdb**) and uninstall and reinstall EDconnect. Restore your original database. Please contact CPS/SAIG Technical Support if you need assistance.

7.1.13 Error 107

Table 8: Error 107

Problem	Solution
An FTP session cannot be initiated	This error occurs when an FTP session cannot be initiated by EDconnect. See Error -1 for possible causes of this error.
Some of the EDconnect program files or folders are read-only or have inadequate rights	Files that have been saved to CD have the read-only attribute set by default. If you have restored any EDconnect files from a CD backup, make sure you remove the read-only attribute from all restored files.

7.1.14 Error 203

EDconnect may be attempting to access a file or a folder on a network drive that is in use by another user or program. Restart your computer and try another transmission

7.1.15 Error 234
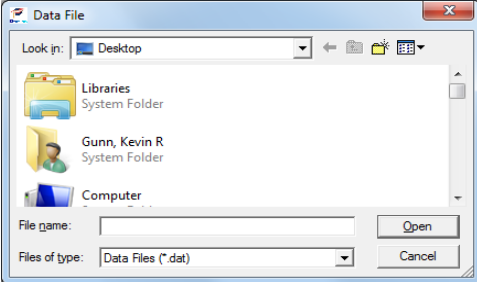
See error 4.xx.
Using a prior version of EDconnect 8 can also cause this error.

7.2 Non-Numerical Errors
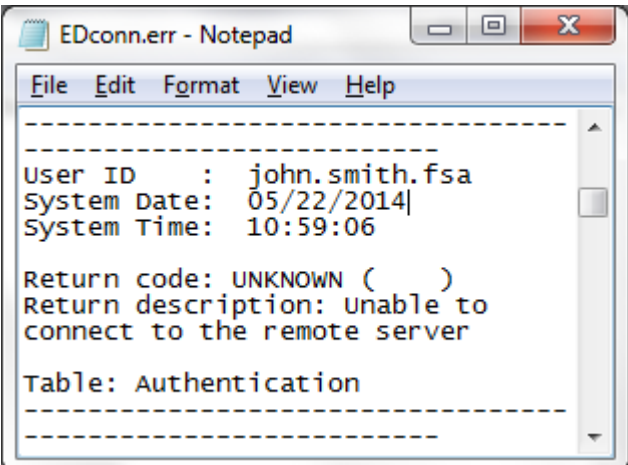
Table 9: Non-numerical Errors

Problem	Solution
"Invalid sender for message class" error referencing CONNCT32 files	EDconnect sends a CONNCT32 file each time you transmit. Under normal circumstances, the file is automatically deleted from your mailbox. If the file is not deleted promptly, EDconnect will try to download it, generating the error. You may see the error if you have tried several transmissions over a short period of time. Clicking the OK button on the error message dialog (this sometimes requires several clicks) will usually allow you to download your files. The next time you use EDconnect, you should not receive the error.
"Invalid sender for message class" error referencing files other than CONNCT32	Contact the SAIG/CPS Help Desk at 800-330-5947 for assistance with this error.
"Path does not exist" during Transmission	This error refers to the **Send** or **Receive** paths that have been set up in EDconnect, such as **C:\IAM\Data**. If you receive this error, first check to make sure the paths are valid. This is particularly important if your **Send** and **Receive** paths are on a network drive. Your workstation may have temporarily lost its connection to the drive. If you find any read-only folders in the EDconnect **Send** or **Receive** paths and cannot remove the read-only attributes, contact your technical support staff. They may need to use the "attrib" command to remove the read-only property from folders that are "stuck" by opening a command prompt and using the command "attrib -r c:*folder name*". The command must be used on each read-only folder in the **Send** and **Receive** paths.
"System error: unable to add/remove headers and trailers"	You may receive this error if you do not have permission to download files to the **Receive** folder specified in EDconnect, or if you do not have permission to send files from the **Send** folder. Have one of your technical support staff log on as an administrator and try a transmission. If this works, your technical support staff will have to change your permission levels. A missing carriage return, or non-ascii character in the file you are trying to send can cause this error. Your technical support staff may need to examine the file or files you are trying to transmit to the SAIG/FTI-SAIG.
"CALog DOC" errors during a transmission, including:	Solution options:

	Run Compact and Repair:
"CALogDoc::add()-it appears this record has already been sent, add unnecessary" **"CALogDoc::add request record not found/add send record not found. Transmission partially successful "** **"CALog DOC: :add ()- activity element invalid, field compressed filename."** **"CALog DOC: :add ()- activity element invalid field file name"**	1. In EDconnect, go to Window, Close All. 2. Go to Tools, Compact and Repair. 3. Say "Yes" to the warning message. Run this several times if necessary. Reduce the number of records in the Activity Log: 1. Open the Activity Log and select the following: Edit > Properties > Receive File tab > Enable automatic delete. 2. Next, set to 365 days If you would like to back up the Activity Log before changing the activity retention period you can go to so by selecting "File/Save As" and saving the "Activity.Arc" file to a location of your choice. If you do not have the appropriate permissions to the location you are sending a file from, contact your technical support staff. If you do not have the appropriate permissions to the location you are sending a file from, contact your technical support staff.
"CTQDoc::Add() - Invalid element contents" **Followed by** **"System error:** **CMailDoc::MoveToTQ() - Unable to move item number XXXX to TQ"**	If you do not have the appropriate permissions to the location you are receiving files, please contact your technical support staff. You do not have the appropriate permissions to the C:\IAM\SAIG_temp directory or the Edconn8.mdb; if it resides on a network drive.
"CTQ doc:: Add message class not found: system error c:mail doc moved to tq; memory error has occurred"	This error may be due to database corruption. Try running "Compact and Repair" several times, exit EDconnect, log back in, and try again. Run Compact and Repair: 1. In EDconnect, go to Window, Close All. 2. Go to Tools, Compact and Repair. 3. Say "Yes" to the warning message. Reduce the number of records in the Activity Log: 1. Open the Activity Log and select the following: Edit > Properties > Receive File tab > Enable automatic delete. 2. Next, set to 365 days 3. Log out of EDconnect, log back in, and try transmitting again.

	You do not have appropriate permissions to the C:\IAM\SAIG_temp directory or to the Edconn8.mdb if it resides on a network drive. Please contact your technical support staff.
A Data File dialog appears after selecting Transmit Now, preventing files from being sent or received. 	You do not have appropriate permissions to the Send or Receive folder, depending on the activity in the Transmission Queue. Contact your technical support staff to confirm your permissions.
A database error has occurred. **Description: Syntax error…"** **Thursday, January 23, 2023** **2:18 PM** **A database error has occurred.** **Description: Syntax error (missing Operator) in query expression 'TRANSMIT = True and Activity = 'Send AND MSG = 'CRDLMYNIN AND ADDDATE = '20230116' AND ADDTIME = '162627' AND FILENAME = 'S:\iam\data\crdl14in.011614 sub reallocation [*name*] ORDER BY ADDDATE, ADDTIME, PROJECT, CYCLE, MSG'. IN DAO.QueryDef**	This error may be due to database corruption. Try running "Compact and Repair" several times, exit EDconnect, log back in, and try again. Run Compact and Repair: 1. In EDconnect, go to Window, Close All. 2. Go to Tools, Compact and Repair. 3. Say "Yes" to the warning message. 4. Repeat several times if necessary. The error can also occur if a user does not have the appropriate rights to the folder from which the file being sent is located.
"A database error has occurred. Description: Unrecognized database format"	This error occurs upon launching EDconnect. The database is corrupt and not recognized by EDconnect. Try rebooting and log in again. If the error persists, please contact the SAIG/CPS Help Desk.
DAO" errors: **"Not a valid bookmark in dao.database"** **"Disk or network error in dao.recordset"** **"No current record in dao record space"** **"Record is deleted in dao.database."**	The user does not have the appropriate permissions to the C:\IAM\SAIG_temp directory or the Edconn8.mdb on a network drive. Another possible reason for the error is that the database is corrupt. Run Compact and Repair 1. In EDconnect, go to Window, Close All. 2. Go to Tools, Compact and Repair. 3. Say "Yes" to the warning message. 4. Repeat several times if necessary.

"Disk or network error in dao db engine" **Preceded by "A database error has occurred"** **"A database error has occurred. Description: Could not find file 'C:\IAM\DATABASE\EDconn8.mdb' in DAO.Workspace"**	The error means EDconnect is unable to locate the database in the expected location. Check the location of the database referenced in the error message. Is the database there? Possible causes of no database: • Performed "Local – Custom" install on a machine that did not already have EDconnect installed to it. Try re-installing EDconnect as "Local". • Performed "Local - Custom install" when you meant to perform a "Workstation" install (existing network database). Try re-installing EDconnect as "Workstation". • Network drive where database is located is unavailable. Try rebooting machine and logging back into EDconnect. Other causes: • The database is so corrupted that EDconnect does not recognize it. Try to restore the backup database or try reinstalling EDconnect completely. Permissions to the folder containing the database could be triggering the error. Contact your technical support staff to check if you have the appropriate permissions.
EDconnect installer unable to see network drives.	If the network drive is invisible to Ede or EDconnect, re-enter the path in the "Universal Naming Convention". This means that instead of entering: "drive letter:\path," you would enter: \\servername\sharename\path • Have one of your network technicians remap the network drive. • Have one of your network technicians turn on Network Discovery. Have one of your network technicians disable User Account Control (UAC).
"An error has occurred. Please contact FTI-SAIG customer service." **This error occurs upon logging in.**	1. Go to My computer and open the c:\IAM\SAIG_temp directory. 2. Open the edconn.err file in Notepad or WordPad. 3. Go to the bottom of the file to verify that the last "System Date" and "System Time" match the time you received the error. 4. The "Return Code" will be "Unknown." 5. Locate the Return Description and consult the table below.
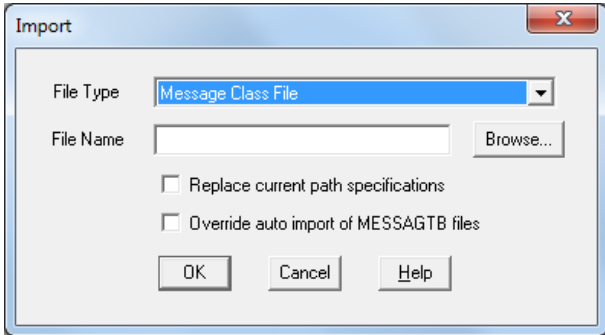
	EDconn.err - Notepad File Edit Format View Help ------------------------------------ ------------------------------------ User ID : john.smith.fsa System Date: 05/22/2014| System Time: 10:59:06 Return code: UNKNOWN ( ) Return description: Unable to connect to the remote server Table: Authentication ------------------------------------ ------------------------------------
Return Descriptions mentioning "timestamp," including: **Return description: WSE065: Creation time of the timestamp is in the future.** **Return Description: WSE066: Timestamp is expired.**	Correct your computer's clock so that it matches the current US time, to the exact minute. Return description: WSE065: Creation time of the timestamp is in the future This typically indicates lack of synchronization between sender and receiver clocks. Make sure the clocks are synchronized or use the time tolerance in second's element in the microsoft.web.services3 configuration section to adjust tolerance for lack of clock synchronization. Return Description: WSE066: Timestamp is expired. This indicates a stale message but may also be caused by lack of synchronization between sender and receiver clocks. Make sure the clocks are synchronized or use the time tolerance in second's element in the microsoft.web.services3 configuration section to adjust tolerance for lack of clock synchronization.
Return description: Unable to connect to the remote server. **Return description: The operation has timed out.** **Return description: The request was aborted: The request was canceled.** **Return description: The remote name could not be resolved.**	These errors are typically caused when EDconnect is unable to connect to "fsaesb.ed.gov" when logging into EDconnect. The issue may require the assistance of your technical support staff. This URL will always time out in a browser, or when it is pinged. But when you enter your FSA User ID/Password to authenticate in EDconnect the software will connect to the fsaesb.ed.gov web address. Solutions: 1. Install EDconnect in a supported environment.

Return description: The remote server returned an error: (407) Proxy Authentication Required.
 	
Return description: The underlying connection was closed: Could not establish trust relationship for the SSL/TLS secure channel.
	a. EDconnect should be installed on a Windows 10 or Windows Server 2012 (32 bit or 64 bit) operating systems. While the EDconnect database file "Edconn8.mdb" can reside on a Windows server or PC, the EDconnect program files should only reside on a PC.
	
	b. Using a virtual PC or installing the EDconnect software directly on a server can cause this error.
	
	c. Accessing EDconnect remotely by using a terminal server or by other means can cause this issue. However, if the machine where EDconnect resides is a PC with Windows 10, we can help you resolve this error on that PC.
	
	2. Reinstall EDconnect.
	    a. If the database file "Edconn8.mdb" resides on a server, perform a "Workstation" install.
	    b. If the database file resides on the local PC, create a backup copy of the database, and perform a "Local" install (without the "Custom" option) and restore the database.
	
	3. Uninstall all Windows updates that have been applied to the PC since this error occurred.
	
	4. Firewall
	    a. Add fsaesb.ed.gov, or its IP address, to your firewall's exceptions list.
	
	5. A Proxy server could be blocking the connection to fsaesb.ed.gov
	    a. In Internet Explorer go to Tools > Internet Options > Connections > Lan Settings.
	    b. Check the "Bypass Proxy server for local address" option and try logging into EDconnect
	    c. Adding the fsaesb.ed.gov URL to a whitelist can also fix this issue
	
	Packet-shaping software – If you use packet-shaping or web-filtering software a rule may have to be created allowing fsaesb.ed.gov traffic.
	
	6. ISP - Do you connect to the internet with an Internet Service Provider?

	a. Their firewall/proxy server/packet-shaping software may be causing this issue. 7. Permissions - Lacking read/write/modify permissions to the hard drive, or to the network location of the EDconnect database file, could cause this issue. 8. Try using another Internet connection, if available. 9. If you have access to another PC, install the EDconnect application and see if it resolves the issue. Try installing EDconnect to a PC outside of your institution's environment.

Intermittent occurrences of the errors listed above	If the error occurs intermittently, these are possible solutions (in addition to those listed above):
	1. Update the host's file.
	     a. Add: 165.224.204.20 fsaesb.ed.gov
	     b. The location of the file should be: C:\Windows\System32\drivers\etc\hosts if you are on Windows 10.
	Clear the cache of your local server.

"A file error has occurred. Description: The file could not be accessed."	You do not have appropriate permissions to the C:\IAM\SAIG_temp directory. Check with your technical support staff. 1. The C:\IAM\SAIG_temp directory is missing one or more subdirectories. These directories are: "Data," "error," "incoming," "maint," "mdn," "outgoing," "runtime" (including its subdirectory "ign"), "security," and "temp." If one or more these directories do not exist, manually create them, or re-install EDconnect. If you reinstall the software, back up your Edconn8.mdb database first. After the installation is complete, restore the database. You do not have appropriate permissions to the Edconn8.mdb that resides on a network drive.
"A file error has occurred. Description: Unknown file exception error"	This error occurs during a transmission. Run Compact and Repair 1. In EDconnect, go to Window, Close All. 2. Go to Tools, Compact and Repair. 3. Say "Yes" to the warning message. 4. Repeat several times if necessary.

	Check with your technical support staff to see if EDconnect is on a supported system. EDconnect must be installed on a PC with Windows 10. If the database is on a server, the server must be Windows 2012 or 2019.
	
	    a. Using a virtual PC or installing the EDconnect software directly on a server machine is not supported.
	
	    b. Accessing EDconnect remotely (e.g., using a terminal server or some other remote setup) is not supported. The only exception to this is if the machine being accessed remotely is a PC with a supported operating system.
	
	This error can also occur if a file being sent is empty or malformed.

"The installed version of the application cannot be determined" error when trying to install EDconnect	This is a permissions issue. Right-click the installer file and choose "Run as Administrator." If a box pops up requiring a password to continue, check with your technical support staff. If this does not resolve the error, check with your technical support staff.
"Mfc application has encountered a problem and needs to close"	Run Compact and Repair: 1. In EDconnect, go to "Window" and select "Close All". 2. Go to Tools, Compact and Repair. 3. Say "Yes" to the warning message. 4. Repeat several times if necessary. You do not have appropriate permissions to the C:\IAM\SAIG_temp directory, or to the Edconn8.mdb that resides on a network drive. Check with your technical support staff There is little or no space on the local drive or on the network drive; if the EDconnect database is installed on a network and/or files are received to the network. Remove the temporary files on the PC. Run spyware removal. If this error occurs during a transmission on a weekly or semi-weekly basis, upgrade to EDconnect 8.6.1.

	If it still occurs, close all programs when running a transmission.
"Not a valid path. Must end in backslashes" **Error occurs when trying to start EDconnect after installation.**	Reinstallation is the only resolution for this error, whether the database is local or on the network. For a local database, back up the database, perform a "Local" installation (full, with database), then insert the backed-up database into the C:\IAM\DATABASE, overwriting the existing blank database just installed. For a network database, perform a "Workstation" installation. You do not have to uninstall EDconnect first when performing this install. During a "Local" (full) install or a "Workstation" installation, the location of the EDconnect database is written to the Windows Registry. During a "Local Install – Custom", it is not. It is necessary for the Registry to contain the database path (this does not apply to Network/Workstation installations). **Local** If you have an existing EDconnect database you would like to use and are installing EDconnect *for the first time*, putting the existing database into the C:\IAM\DATABASE folder and running a "Local Install – Custom" *will not* work and will trigger the "must end in backslashes" error. The only way to use the backed-up database is to perform a "Local" install, which installs a new database, then put the backed-up database into the C:\IAM\DATABASE folder to overwrite the blank database installed during the Local install. **Workstation** Install as usual, making sure to select the correct database location.
"Password Not Changed In Tdclient.ini"	Uninstall and reinstall EDconnect, backing up the Edconn8.mdb database and restoring it afterwards. Or: You do not have appropriate permissions to the C:\IAM\SAIG_temp directory or to the Edconn8.mdb that resides on a network drive. Check with your technical support staff. The same folder is utilized for FTI-SAIG.
"Search key was not found in any record"	Run Compact and Repair: 1. In EDconnect, go to Window, Close All. 2. Go to Tools, Compact and Repair.

	3. Say "Yes" to the warning message.
	4. Repeat several times if necessary.
Unable to select Send or Receive in the Transmission Queue—no drop-down arrows under Activity.	This error can be associated to Windows rights to the network folder containing the database or to C:\IAM\SAIG_temp, it can also be due to problems with the message class table. Contact your technical support staff to check your permissions, Compact and Repair the database (**Tools**, **Compact and Repair**), then import (or reimport) the latest message class table.
	To reimport the latest message class table, users will need to check the "Override auto import of MESSAGTB files" checkbox (**File**, **Import**, **Message Class File**).
	After reimporting, return to **File**, **Import**, **Message Class File** and uncheck the "Override auto import of MESSAGTB files" checkbox.
	`If these steps fail to resolve the issue, check with your technical support staff for assistance with Windows permissions.`
"Server busy. This action cannot be completed because the other program is busy. Choose "Switch to" to activate the busy program and correct the problem."	This issue can have a variety of causes specific to the workstation or network server. *It is not an EDconnect error.*
	Have your technical support staff unselect the following security checkbox: "Turn on real time protection" in "Microsoft Security Essentials" to see if it removes the error.
	If you use Novell as your server software, contact Novell customer service. The issue may be associated to a Novell setting.

	This error can also be caused by virus/spyware infections. The computer should be thoroughly checked. Anti-virus software can also cause this error. Users may need to adjust a setting so EDconnect does not receive this error.
"System error: CMailDoc::MoveToTQ() Unable to move item number _____ to TQ" during Transmission	Receiving or sending files from a directory without having user read/write/modify rights; or that is read-only; or that resides on a network drive where a connection has been lost, can all cause this error. Lacking read/write/modify permissions to the C:\IAM\SAIG_temp folder? Contact your technical support staff to check your permissions.
You do not have access to this function" when trying to transmit	You are logged into the FSA Administration Group, which cannot transmit. On the EDconnect authentication log in page, select the Group ID that was set up to make transmissions.
"You do not have permission to use EDconnect"	You have not been enrolled for EDconnect entitlement or were enrolled for the entitlement with the incorrect personal identification information. Please contact your school administrator.

NOTE: Repairing an EDconnect database from outside of EDconnect

If an error prevents you from logging in to EDconnect, you will only be able to Compact and Repair the database file "Econn8.mdb" from outside of EDconnect. To do this, you must open the database in Microsoft Access. You may require the assistance of your technical support staff.

Go to the directory containing the database and double-click the file. The following instructions are for Office 365.

Access 365

1. Create a backup of the database.
2. Double click the production EDconnect database, or the backup (repairing the production database prevents having to copy and paste the repaired version).
   *Note: You may have to click **OK** to the missing references messages multiple times.*
3. Once the database is open, select **Database Tools**.
4. Select **Compact and Repair Database**.
   *Note: You may have to click **OK** to missing references messages multiple times.*
5. When finished, the list of "tbl_*" files will appear on the left, as it did when you first opened the database. The cursor will change from an hourglass (or the circular equivalent) to its default appearance.

8. Security Authentication Errors

An error message will display when the security authentication process fails, and you are denied access to EDconnect.

Table 9: Security Authentication Errors

Problem	Solution
"Your password is about to expire. Choose Yes to go to the web page to change it."	Click "yes" to be routed to the change password website.
"Your password is expired. Choose Yes to go to the web page to change it, then return to authenticate."	Click "yes" to be routed to the change password website. Return to Security Authentication screen to authenticate.
"Authentication failed. You have used an invalid User ID or password."	If you receive this error, you need to confirm the FSA User ID and FSA User ID password you are using are correct. If you are using the correct the FSA User ID, click Forgot Password. If you are unable to answer your challenge questions, you will need to call the SAIG/CPS Help Desk to have your password reset. In order to reset your password, the SAIG/CPS Help Desk requires your Social Security Number and date of birth.
"Authentication failed. This account has been temporarily locked for 15 minutes due to too many failed login attempts. Please wait 15 minutes and try again. If you have forgotten your password, please select the Forgot Password button to reset your password. You may log in with the new password after the initial 15-minute wait has elapsed."	If you receive this error, you will need to wait minutes to login again.
"Authentication failed. You have an account that has been disabled. Please contact the SAIG/FTI-SAIG Help Desk for Assistance."	If you receive this error, you will need to call the SAIG/FTI-SAIG Help Desk.
"Authentication failed. You have used an invalid Security Code. If you have forgotten your token, choose Yes to go to the FORGOT Token web page." "Otherwise, please contact the SAIG/FTI-SAIG Help Desk for assistance."	If you receive this error, you will need to call the SAIG/FTI-SAIG Help Desk.
"Authentication failed. Your token information was not found. Please register your token. Choose Yes to go to the web page to register it, then return to authenticate."	Select "yes" and your browser will route to the register your token website. After you register your token, you will need to return to the Security Authentication screen to authenticate your credentials.
"Authentication failed. Operation not allowed in current state of credential. Please contact the SAIG/FTI-SAIG Help Desk for assistance."	If you receive this error, you will need to call the SAIG/CPS Help Desk.

"Authentication failed. You have an account that has been disabled. Please contact the SAIG/CPS Help Desk for Assistance."	If you receive this error, you will need to call the SAIG/CPS Help Desk.
"Authentication failed. You have used an invalid Security Code. If you have forgotten your token, choose Yes to go to the FORGOT Token web page." "Otherwise, please contact the SAIG/CPS Help Desk for assistance."	If you receive this error, you will need to call the SAIG/CPS Help Desk.
"Authentication failed. Your token information was not found. Please register your token. Choose Yes to go to the web page to register it, then return to authenticate."	Select "yes" and your browser will route to the register your token website. After you register your token, you will need to return to the Security Authentication screen to authenticate your credentials.
"Authentication failed. Operation not allowed in current state of credential. Please contact the SAIG/CPS Help Desk for assistance. "	If you receive this error, you will need to call the SAIG/CPS Help Desk.
"You do not have permission to use EDconnect. Please contact Participation Management for details about how to participate. Choose Yes to go to the PM Enrollment web page."	Select "yes" and your browser will route to the PM enrollment website.
"Error Communicating with Authentication Service. Please wait a while and try again or contact the SAIG/CPS Help Desk for assistance."	Please wait a couple minutes and try again or contact the SAIG/CPS Help Desk for assistance.

9. Miscellaneous

9.1 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.

9.1.1 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.

9.1.2 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 **FSA User ID** in the **Security View** and select **Properties** from the pop-up menu or highlight your **FSA 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.

9.2   Getting Help

For assistance with EDconnect, contact the SAIG/CPS Help Desk.

- 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 8am–8pm (ET) Monday through Friday

10.   Frequently Asked Questions

10.1 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** or a **Security Setup**.
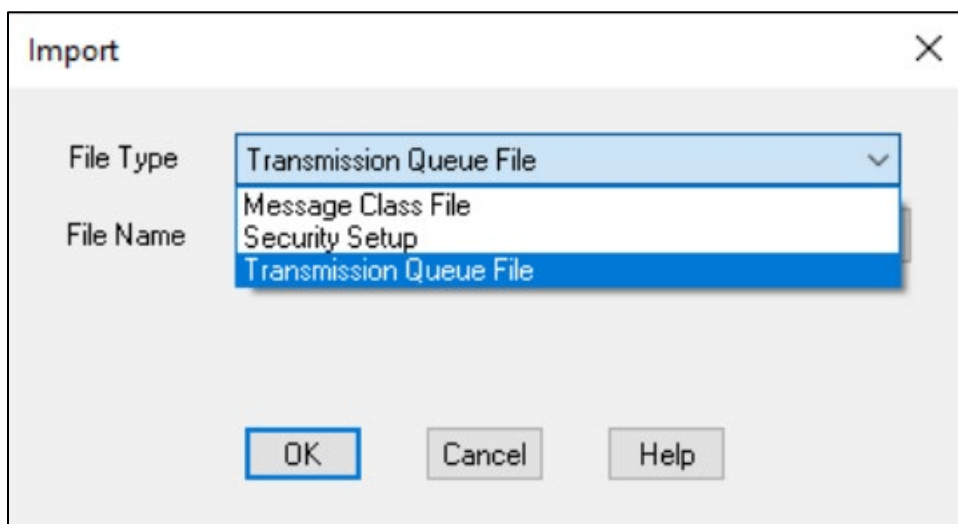
3.   Click the **Browse** button to select a file to import.

4.   Click **OK**.

Helpful Hints

- ◆ The **Import** function can be especially useful if you have several PCs using the same **FT/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.
- ◆ The **Transmission Queue File** option is for. imps and can only be used with a .imp file that is set up for an **Unattended User ID**.

10.2 What files do I need to move when changing PCs?

After installing EDconnect on a new computer, be sure to copy the **EDconn8.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 **EDconn8.mdb**, EDconnect displays the path to the database at the bottom right of the EDconnect screen.

TGA0376	harry.potter.fsa	c:\iam\database\edconn8.mdb						
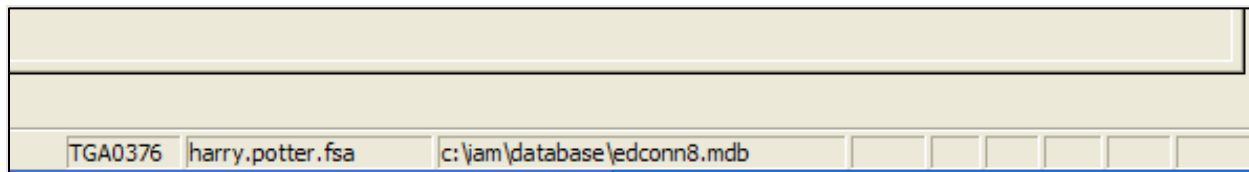
You should also move any folders that contain files you have sent or received, maintaining the same file paths, if possible. On a stand-alone PC, this is often C:\IAM\DATA.

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

In most cases, the "Invalid Value" error message occurs because a field is empty or incomplete. EDconnect 8.6.0 highlights this field so you can fill it in correctly.

10.4 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. COD files cannot be imported into the EDExpress or any third-party software if the individual COD files are combined.

10.5 Why am I getting an error notification that 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.

NOTE: This error notification only applies to SAIG users, since FTI-SAIG users can only receive data but cannot send it.

10.6 What is the difference between a Security Authentication error and a Numerical Error?

A Security Authentication error exclusively occurs when a user tries to access EDconnect without the proper credentials. When these messages appear, always double check your credentials to make sure they are correct.

A Numerical or Non-Numerical Error occurs when there is an error not related to the Security Authentication process. These can include Internet connection problems and SAIG/FTI-SAIG password problems.

10.7 What should I do if I get Error -1?

If your internet connection is working contact your IT department and have them check to see if you are behind a firewall, proxy server, traffic shaper, or content-control software. In order for SAIG users to connect to saigmailbox.ed.gov, port 26581 must be open for outbound TCP/IP transmissions. For FTI-SAIG users to connect to ftisaigmailbox.ed.gov port 26586 must be open for outbound TCP/IP transmissions.

11. Appendix A – SAIG and FTI-SAIG User Statements

11.1 SAIG User Statement

Anyone who accesses Title IV program data and uses resources that access SAIG (such as computers or workstations) must read and sign this statement. Keep a copy of the signed statement for your records. A signed original SAIG User Statement must be completed and maintained by the destination point administrator for each of the destination points (electronic mailboxes) to which you have access.

A SAIG User understands that if he or she intentionally submits false or misleading information to the U.S. Department of Education, he or she will be subject to a fine up to $10,000, imprisonment for up to five years, or both, under provisions of the United States Criminal Code (including 18 U.S.C. 1001). The SAIG User also agrees to comply with all provisions of Section 483 of the Higher Education Act of 1965, as amended.

A SAIG User understands that the information provided to him or her by the U.S. Department of Education is protected by the Privacy Act of 1974, as amended. Protecting this information, once it is entrusted to the SAIG User, becomes his or her responsibility. Therefore, the SAIG User agrees to protect the privacy of all information that has been provided to him or her by the U.S. Department of Education. The SAIG user understands that any person, including himself or herself, who knowingly and willfully requests or obtains any record concerning an individual from an agency under false pretenses shall be guilty of a misdemeanor and may be fined not more than $5,000.

Appropriate Use
At a minimum, appropriate use consists of the following:

- Using SAIG computing resources only for official government business. Any other use must be approved expressly by the U.S. Department of Education.
- Knowing the SAIG destination point administrator for each of the destination points you access and how to contact them.
- Protecting all SAIG information from access by or disclosure to unauthorized personnel.
- Reporting immediately to your destination point administrator any security incidents, potential threats, or vulnerabilities that involve SAIG resources.
- Protecting any tools, such as passwords, that allow you access to SAIG (these tools are called "authenticators").
- Reporting to your destination point administrator any compromise, suspected compromise, or incidents of sharing of a password or any other authenticator.

- Accessing only systems, networks, data, control information, and software for which you are authorized.
- Ensuring that all information that comes from SAIG is marked according to its sensitivity and is properly controlled and stored.
- Informing your destination point administrator when you no longer need access to a SAIG resource, such as when you change jobs or leave employment.
- Avoiding the introduction of any code that might be harmful to SAIG.

TG#_____ Destination Point Administrator (DPA)Name_____

SAIG User Name _____

(Print) SAIG Job Title_____SSN_____Phone #(____)_____

SAIG User Signature_____Date_____

DPA Signature

_____Date_____

NOTE: This statement, with an original signature, must be maintained by the Destination Point Administrator. **DO NOT SEND THIS TO SAIG**

11.2 FTI-SAIG User Statement

Any individual who is not a Destination Point Administrator and who accesses Federal Student Aid systems or other Federal agencies' systems for the purposes of administering the HEA programs, and/or uses resources that access Federal Student Aid systems or other Federal agencies' systems for the purposes of administering the HEA programs, whether by batch or online, must read and sign this statement.

The original Federal Student Aid User of Electronic Services Statement must be maintained by the organization. The user should keep a copy of the signed statement for his or her records.

The user understands that intentional submission of false or misleading information to the U.S. Department of Education is subject to a fine up to $10,000, imprisonment for up to five years, or both, under provisions of the United States Criminal Code (including 18 U.S.C. 1001). The user also agrees to comply with all provisions of Section 483 of the Higher Education Act of 1965, as amended.

The user understands the intentional use of an access device (18 U.S.C. 1029(e)(1)) issued to another person or obtained by fraud or false statement to access the U.S. Department of Education information technology systems for fraud, commercial advantage, or private financial gain shall be guilty of a felony and is subject to a fine of up to $20,000, imprisonment for up to five years, or both, under provisions of the United States Code (20 U.S.C. 1097(e)).

The user understands that the information provided by the U.S. Department of Education is protected by the Privacy Act of 1974, as amended.

Protecting this information, once it is entrusted to the user, becomes his or her responsibility. Therefore, the user agrees to protect the privacy of all information provided to him or her by the U.S. Department of Education.

The user understands that any person, including himself or herself, who knowingly and willfully requests or obtains any record concerning an individual from an organization under false pretenses, shall be guilty of a misdemeanor and is subject to a fine of up to $5,000 (5 U.S.C. 552a(i)(3)).

Responsibilities of the Electronic Services User
- Appropriate uses of Federal Student Aid systems or other Federal agencies' systems for the purposes of administering the HEA programs, by an Electronic Services User: Must use Electronic Services computing resources only for official government business.
- Must use Electronic Services computing resources only for official government business.
- Must ensure that a substantially Established Relationship with the applicant is in place (e.g., the applicant has applied for admission to the institution, the applicant has included the institution on the FAFSA®, or the lender holds a loan for the borrower) before accessing Federal Student Aid systems or other Federal agencies' systems for the purposes of administering the HEA programs, to obtain privacy protected information about the student.
- Must ensure that all Federal Student Aid applicant information (including federal tax information) is used for the application, award, and administration of financial aid to an applicant consistent with 20 U.S.C. §1090 and redisclosure requirements of FTI under 26 U.S.C. §6103(l)(13).
- Must adhere to the strict confidentiality requirements when accessing FTI under 26 U.S.C. §6103.
- Must know the name of the Primary DPA and how to contact that individual.
- Must protect all Federal Student Aid systems or other Federal agencies' systems for the purposes of administering the HEA programs from access by or disclosure to unauthorized personnel.
- Must protect all Federal Student Aid systems or other Federal agencies' systems for the purposes of administering the HEA programs from access by or disclosure to unauthorized personnel.
- Must report immediately to the Primary DPA any security incidents, potential threats, or vulnerabilities that involve Electronic Services.
- Must report to the Primary DPA any compromise, suspected compromises, or incidents of sharing of a password or any other authenticator.

- Must protect all Federal Student Aid systems or other Federal agencies' systems for the purposes of administering the HEA programs from access by or disclosure to unauthorized personnel.
- Must report immediately to the Primary DPA any security incidents, potential threats, or vulnerabilities that involve Electronic Services.
- Must report to the Primary DPA any compromise, suspected compromises, or incidents of sharing of a password or any other authenticator.
- Must access only those systems, networks, data, control information, and software for which he or she is authorized.
- Must ensure that all Electronic Services information is marked according to its sensitivity and is properly controlled and stored.
- Must inform the organization's Primary DPA the Electronic Services User no longer needs access to a Federal Student Aid system (i.e., the individual is leaving his or her position or his or her job responsibilities have changed).
- Must not add code that might be harmful to the SAIG or Electronic Services.

My signature below affirms that I have read this Statement and agree to abide by these rules.

TG#_____ Electronic Services User's Name _____
(Print)
Electronic Services User's Job Title _____
Phone # (____) _____
Electronic Services User's Signature _____ Date _____

Primary DPA Signature _____ Date _____

(This statement with an original signature [not a stamped signature] must be maintained by the Primary DPA.)

NOTE: This statement, with an original signature, must be maintained by the Destination Point Administrator. **DO NOT SEND THIS TO SAIG**