# CVM eSubmitter Preferences Quick Guide

Preferences are settings that you can alter to change the way the application behaves. By adjusting the values within preferences you configure the application to best suit your working needs.

Listed below are the categories of preferences within your control:

- File Locations

- Networking

- Auto-Save

- Layout

- File Viewer

- Messages

To open the *Preferences dialog*, click the **Preferences** option from the **File** menu on the menu bar. The preferences dialog will appear as shown below.

Preferences Dialog
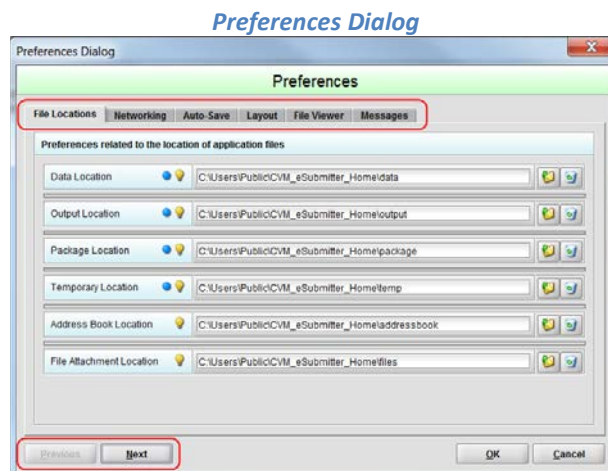
Navigating between the categories of preferences is accomplished by either clicking the category tabs at the top of the screen or by clicking the **Next** and **Previous** buttons at the bottom of the screen. The following subsections provide guidance on the settings available within each preference category.

File Locations

The File Locations option configures the locations of all the working folders used within the application. During the installation process, there was an option to select an Installation Type. The options were **User Workstation** or **Network Drive**. The type selected determined the default locations of the application working folders.

- **User Workstation:** This option assumes the application will be installed locally for a single user. It creates the application working folders within the local public area where user related files are commonly maintained (e.g., \Users\Public\CVM_eSubmitter_Home).

- **Network Drive:** This option assumes the application will be installed on a network drive where it can be shared across users. It creates the application working folders within the CVM eSubmitter application folder on the network drive.

Listed below are descriptions of what is maintained within each working folder:

- **Data Location:** Stores submission data files created by the user

- **Output Location:** Stores files manually generated by the user (e.g., Submission Report file, Missing Data/Validation Issues Report)

- **Package Location:** Stores final package (zip) files generated by the application during the packaging process

- **Temporary Location:** Stores interim temporary files generated by the application as part of a process (e.g., packaging process)

- **Address Book Location:** Stores the address book information supplied by the user for reuse during data entry

- **File Attachment Location:** Identifies the default folder location that will be opened whenever attaching a file as part of a response within a submission

Preferences: File Locations
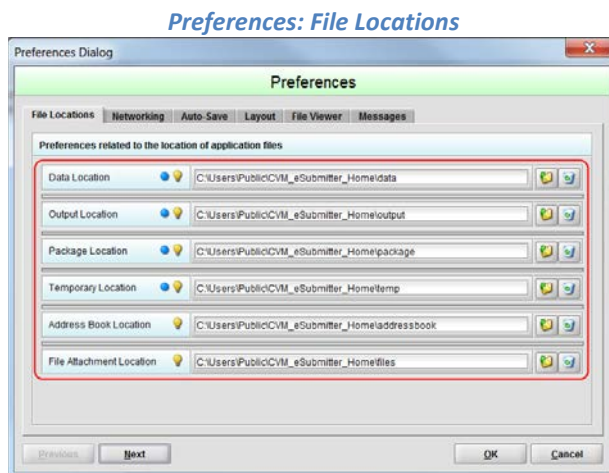
For each folder location, either manually type in the folder path or click the **Folder** icon to display a folder browser dialog for navigating to a folder location. When closing the preferences dialog, each location will be verified to ensure that it exists and has the appropriate user privileges to create and update files.

The File Locations option within the preferences provides an opportunity to fine tune the working folder locations to best suit the needs of the user and organization. There are three common configurations:

- Option 1: User workstation install with each user working completely independent

- Option 2: User workstation install with users sharing resources on a shared network drive (recommended)

- Option 3: Network install with users sharing the application and resources across a shared drive

Option 1: User workstation install with each user working completely independent

This option is best suited for very small organizations with limited IT resources where there is very little value in sharing files across users.

Advantages	Disadvantages
• Better application performance • No additional configuration beyond initial install • Lower risk of updates blocked for smaller organizations (firewall restrictions less likely) • Separate user preference configurations	• Higher chance file backups will require manual effort • Sharing of files is a manual effort (copy from workstation to workstation) • Higher risk of updates blocked for larger organizations requiring manual updating across workstations (firewall restrictions more likely)

Setup: Use standard configuration installed with User Workstation installation type

Option 2: User workstation install with users sharing resources on a shared network drive (recommended)

This option is best suited for small to large organizations that allow applications to be installed on individual workstations and prefer the best combination of performance and resource sharing across users.

Advantages	Disadvantages
• Better application performance • High opportunity for sharing files (data, address book, packages) • High chance file backups are automatic • Separate user preference configurations	• Minimal additional configuration required • Higher risk of updates blocked for larger organizations requiring manual updating across workstations (firewall restrictions more likely)

Setup: Configure data, address book, and package folders to network drive; locate output and temporary folders to local drives

Option 3: Network install with users sharing the application and resources across a shared drive

This option is best suited for small to large organizations that require strict control over where applications are installed and are willing to sacrifice performance for control.

| Advantages	Disadvantages
• High opportunity for sharing files (data, address book, packages) • High chance file backups are automatic • Updates easier to manage with one installation	• Lesser performance (dependent on network speed/traffic) • Minimal additional configuration required (includes creating desktop short-cuts to access application on network drive) • Higher risk of updates blocked for larger organizations requiring manual updating across workstations (firewall restrictions more likely) • Single user preference configuration for all users • Low potential file generation issue with a shared temporary location (on a network) and statically named files generated during simultaneous packaging processes across users

Setup: Configure data, address book, and package folders to network drive; attempt to reference output and temporary folders to common folder names that exists across workstations to minimize potential issues with simultaneous packaging processes across users

Networking

The Networking option configures the file locking capability when using the application on a network. The application is primarily designed for use by one user at a time. However, in an effort to help support those that prefer to run the application from a network, and to prevent users from accidentally over-writing the work of another, a simple file locking strategy has been incorporated. By enabling file locking, a user will be warned if the submission file that they are attempting to open is currently in use by another user. By default the file locking capability is disabled.

The following option is available:
- Check the **Enable File Locking** box to turn the file locking feature on or clear the check box to turn the file locking feature off

*Preferences: Networking*
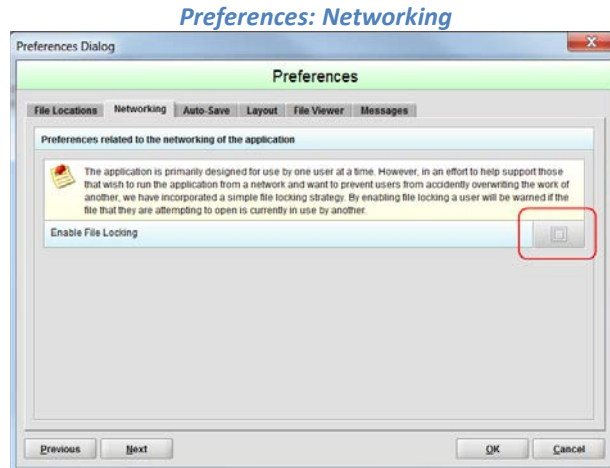
Auto-Save

The Auto-Save option configures the application to automatically save your work at a timed interval. Some users find this feature a time saver since they do not have to manually perform a save, while others prefer to have control over when saves are performed. By default the auto-save is disabled.

The following options are available:
- Check the **Enable auto-save** box to turn the auto-save feature on or clear the check box to turn the auto-save feature off
- When auto-save is enabled, it is required that you provide a value in the **Time interval between saves** option to set how often you want the save to occur (the default, and lowest value allowed, is 10 minutes)

Preferences: Auto-Save
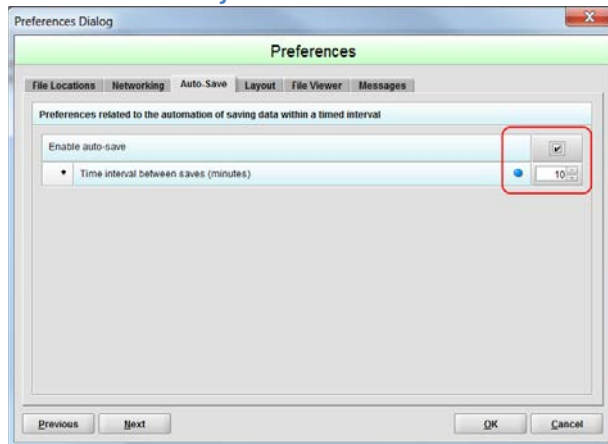
Layout

A submission, as displayed within the application, contains two distinct display areas. The *Outline* area that provides a table of contents listing the sections contained within the submission, and the *Screen* area that displays the data entry form for the selected section. The application supports two different layout approaches: *Simple* and *Extended*.

The simple layout separates the outline and screens areas across two distinct views where only one is visible at a time, while the extended layout combines the outline and screen areas into a single view with a resizable splitter between the two areas. Layout views can be switched from the **View** menu or by clicking between view options on the tool bar.

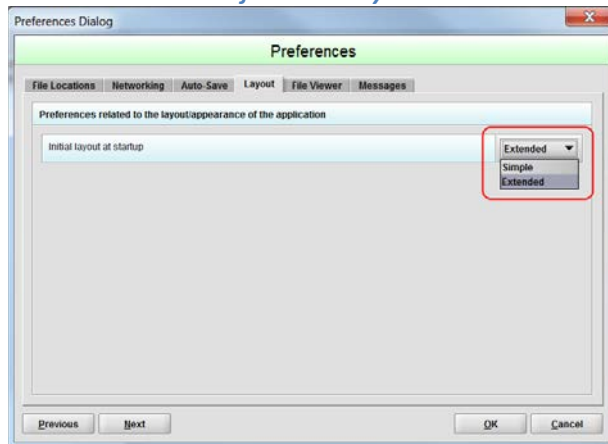*Simple Layout (left) vs. Extended Layout (right)*
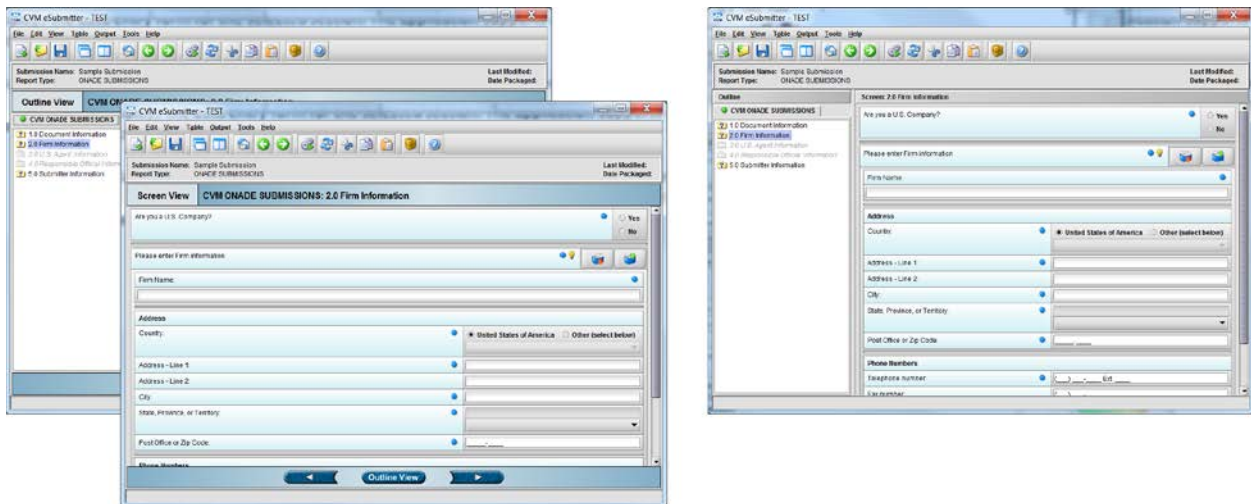
While the extended layout provides constant visible tracking of where you are within the submission, the simple layout provides better supports for smaller screens.

The Layout option configures the starting view of a submission when opened. By default the layout is set to "Extended".

Preferences: Layout

File Viewer

The File Viewer override option configures the application to use a specific Adobe viewer other than what is designated by the operating system (OS). This feature only need be set when the OS has no designated Adobe viewer or when you wish to use an Adobe viewer different from what is designated within the OS. By default, no Adobe viewer override is set.

The following option is available:

- Either manually type in the folder path/application file name of the Adobe viewer or click the **Folder** icon to display a folder browser dialog for navigating to a the application file name. When closing the preferences dialog, the application will be verified to ensure that it exists.

Preferences: File Viewer
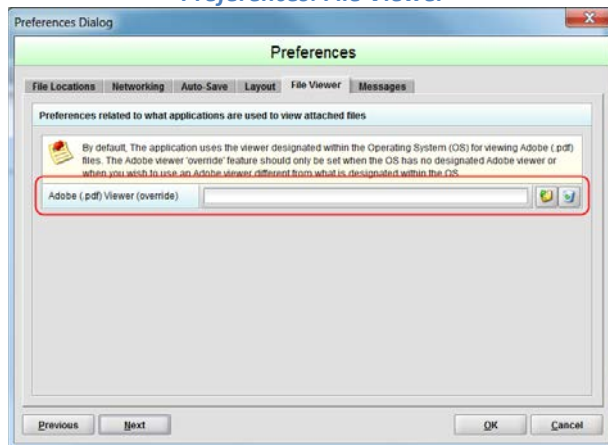
Messages

The Message options configure the application to display additional messages when exiting screens.

Listed below are descriptions of the message options:

- Enable Missing Data/Validation Message

- Enable List Add/Navigation Message

The following options are available:

- Check the **Enable Missing Data/Validation Message** box to turn the message feature on or clear the check box to turn the message feature off

- Check the **Enable List Add/Navigation Message** box to turn the message feature on or clear the check box to turn the message feature off

Preferences: Messages
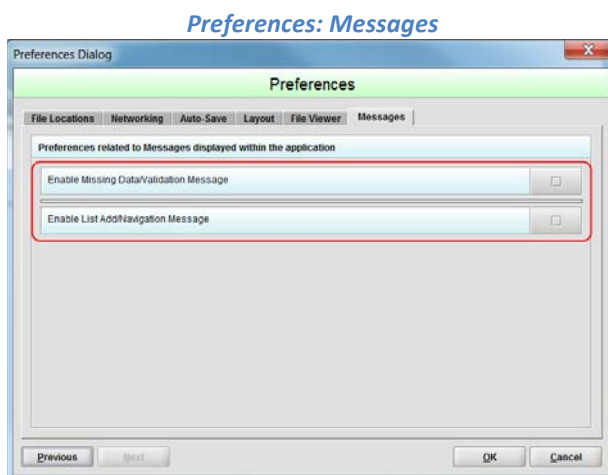
Enable Missing Data/Validation Message
When enabled, this message display a warning dialog whenever exiting a screen with missing data or validation issues. The message provides the option of returning to the screen to fix the issue(s) or continuing to the next selected screen. Some users may find this reminder helpful when data entry follows a linear path of completing each screen in sequential order, while others prefer the flexibility of moving in and out of screens completing what is available at the time and dealing with missing data at the end of the process. By default, the Missing Data/Validation Message option is disabled.

Missing Data/Validation Issues Warning Dialog
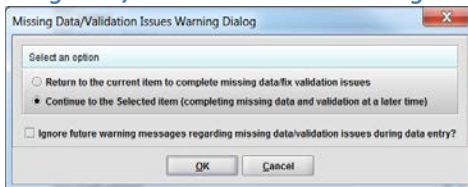
Enable List Add/Navigation Message
When enabled, this message displays an action-based dialog whenever exiting a list screen (i.e., screen that supports the entry of multiple items). The message provides the option of adding another item to the list or continuing to the next screen. This message only display in the Simple view. Some users may find this message helpful when clicking the **Next** button in the Simple view since it provides the option of adding the *next* item or going to the *next* screen. By default, the Enable List Add/Navigation Message option is disabled.

Enable List Add/Navigation Message Dialog