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# National Children's Study Adjunct Studies

## eSubmitter User Manual



Document Version 1.0

July 25, 2007

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# 1. INTRODUCTION

The National Children's Study (NCS) eSubmitter tool is a free program that allows proposing institutions to electronically complete and submit Adjunct Studies proposals. This tool is intended to improve the application and review process, allowing for quicker completion and evaluation of proposals. The NCS eSubmitter software requires completing a series of questions in electronic forms and allows attaching documents when additional information is needed.

As the National Children's Study proceeds, scientific knowledge will evolve and the Study will serve as an appropriate platform upon which to build additional scientific studies. Investigators from various sectors (such as academia, government, and industry) are encouraged to propose (and obtain approval to conduct) adjunct studies. Such studies will enhance the breadth, depth, and value of the Study and will assure continued interest of a diverse group of investigators, which is critical to the overall success of the Study. To protect the quality and integrity of the Study, adjunct studies will be reviewed and approved by a defined, rigorous process. Adjunct studies will generally require outside (non-Study) funding.

## 1.1 ABOUT THIS USER MANUAL

The instructions in this manual provide detailed information for installing the NCS eSubmitter software onto a computer with a **Microsoft Windows operating system**. **In addition, this user guide assumes familiarity with terms associated with using a computer (e.g. clicking and double-clicking).**

This guide is organized into six sections (in addition to this one):

**Section 2** explains the requirements for running NCS eSubmitter software, installation instructions, proxy server instructions, and uninstall instructions.

**Section 3** provides instructions for quickly starting up the software.

**Section 4** provides descriptive information about the software and various dialog boxes..

**Section 5** provides instructions for completing an actual proposal and getting the application ready to submit to NICHD.

**Section 6** provides information for getting technical support for the eSubmitter software.

**Section 7** contains a Table of Figures.

Please note that the screens used in this document are **examples** of what you might see while using the software. However, they may not appear exactly as shown. In this document, titles and contents of dialog boxes appear in this format: **Text**.

This convention is used so that you may easily differentiate what you see on your computer screen from the text in this user manual.

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## 2. SOFTWARE INSTALLATION

### 2.1 SYSTEM REQUIREMENTS

- Windows Operating System
- Adobe Acrobat Reader v5.0 or greater (for attaching files)
- Software capable of viewing HTML, such as a Web browser, Microsoft Word, or Adobe Acrobat (full installation version, not the Reader)
- 40 MB of disk space

### 2.2 UNINSTALL INSTRUCTIONS

Before installing NCS eSubmitter, **uninstall any other version of the software.**

**Note:** If you do not have a previous version of eSubmitter, proceed to installing the current version of eSubmitter software.

**To uninstall a previous version of eSubmitter:**

1. Use Windows Explorer to navigate to the label for the computer's installed hard drive, e.g., **Local Disk (C:)**. For example, on a computer with Windows 2000:
  - Open Windows Explorer.
  - Double-click **My Computer** to display its contents.
  - Look for the label of the computer's installed hard drive. For example, **(C:)**.
2. Double-click on the label for the hard drive to display its contents.
3. Navigate to and double-click to open the **Program Files** file folder.
4. Navigate to and click to open the **NCS eSubmitter** file folder.  
You will see the folder's contents in the pane on the right-hand side of the screen.
5. Double-click on the **Uninstall.exe** file, and follow the instructions provided.

**Note:** If you do not see the **Uninstall.exe** file:

- Locate and double-click to open the **JExpress** file folder.
  - Double-click on the **uninstall.bat** file, and follow the instructions provided.
6. When the previous version has been uninstalled, you are ready to install the current version of the NCS eSubmitter software. See the following procedure.

### 2.3 INSTALLATION INSTRUCTIONS

**To install the latest version of the NCS eSubmitter software, you must register at the following website:**

[http://www.nationalchildrensstudy.gov/adjunct\\_studies/application\\_information.cfm](http://www.nationalchildrensstudy.gov/adjunct_studies/application_information.cfm)

1. Follow the instructions on the application website to receive an e-mail containing login information to download the application software (eSubmitter) with the application form.

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2. When you are ready to download the application, follow the instructions provided on the wizard (see *Figure 1*). The software will be installed locally on your hard drive in **C:\Program Files\NCS\_eSubmitter**.

**Notes:** 1. You can change the location where the software is installed by changing the file path on the **Installation Directory** dialog box when it appears.

2. The software may be installed on a network. However, the software was not intended to be used by multiple users at the same time. As long as it is used only by one individual at a time, there is no issue with installing the software on a network.



**Figure 1: Install Wizard**

## 2.4 PROXY SERVER INSTRUCTIONS

If you are using a proxy server to connect to the Internet, you will need to change the application's properties file (**eSubmitter.properties**) to reference the server. See your System Administrator for help in changing the properties file.

The properties file is located in the application's JExpress subdirectory (**Program Files\NCS\_eSubmitter\JExpress**). Add the following switches **before** the -cp switch: -DproxySet=true -DproxyHost=[proxy\_host] -DproxyPort=[proxy\_port] (replace [proxy\_host] and [proxy\_port] with the appropriate information for your configuration).

If the proxy server requires a user id and password, add the following two properties to the **update.control** file that's also located in the **JExpress** subdirectory:

**proxyUserName=**  
**proxyPassword=**

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### 3. GETTING STARTED

After you have successfully installed the NCS eSubmitter software, you are ready to start up the application and create a new report. This section provides instructions for starting up the software and setting up the application.

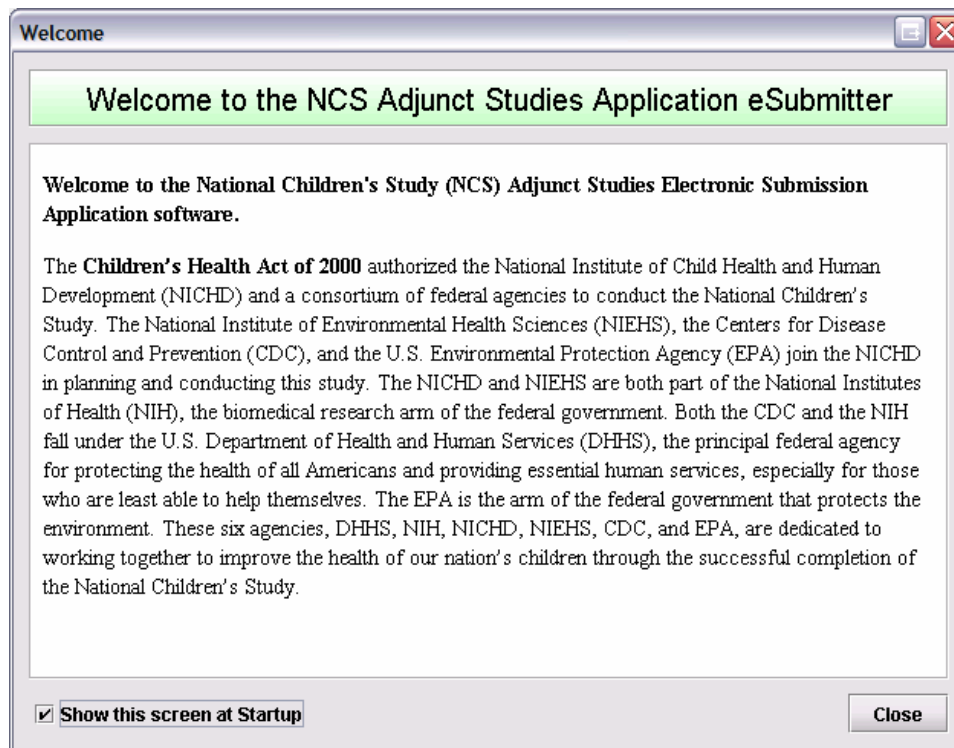
#### 3.1 STARTING THE SOFTWARE

**To start up the NCS eSubmitter application:**

1. Click **Start**, and select **Programs > NCS eSubmitter > NCS App**.

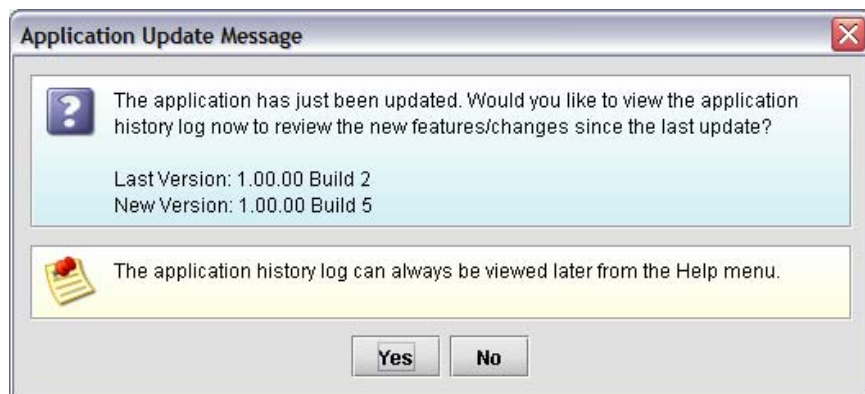
You will see a **Welcome** dialog box, which provides an introduction to the application. You can set the **Welcome** dialog box to no longer display at application startup. For this setting, click to clear the **Show this screen at Startup** check box within the dialog box.

2. When you are finished reading the **Welcome** dialog box, click **Close**.



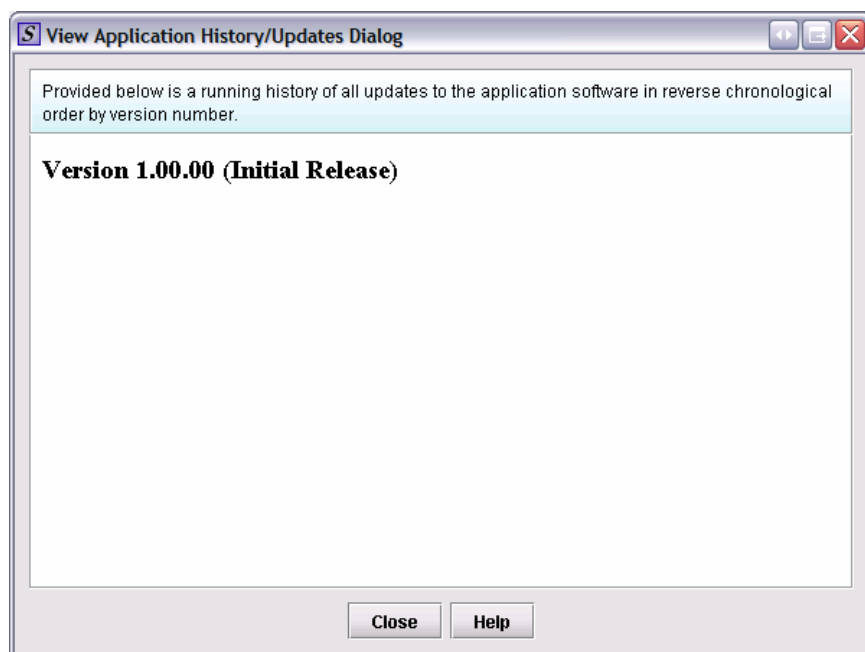
**Figure 2: Example of the NCS eSubmitter Welcome Dialog Box**

If the eSubmitter software has been updated and you are connected to the Internet, you will see an **Application Update Message** notifying you that the software has changed. See *Figure 3* for an example.



**Figure 3: Example of an Application Update Message**

3. On the **Application Update Message**:
  - Click **No** if you do not wish to see a list of the changes to the software. You can review the changes at a later time if you wish. For more information see *View Application History Log* in the section, *Menu Bar - Help*, beginning on page 26.
  - Click **Yes** if you do want to review a list of changes to the software. You see the **View Application History/Updates Dialog** box. See *Figure 4* for an example.

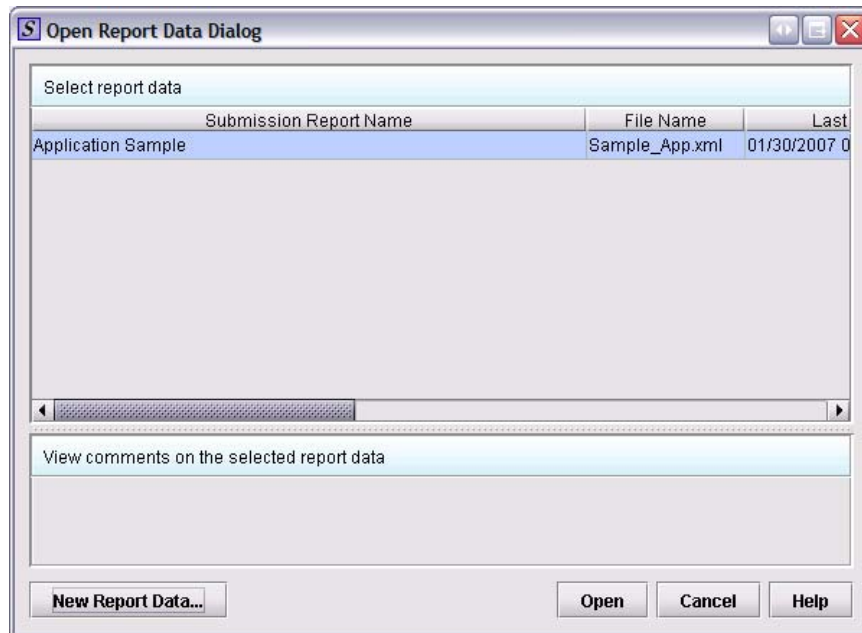


**Figure 4: Example of View Application History/Updates Dialog Box**

- ⇒ Click **Close** when you are finished reviewing the list of changes. The dialog box closes.
4. Next, you see the **Open Report Data Dialog** box (*Figure 5*). This dialog box allows you to select an existing application or begin a new one. As you create new applications, they are shown in this dialog box as a list of all the available

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submissions with as shown in *Figure 5*. However, if this is the first time that you started up the software after installation, the list will be blank.



**Figure 5: Open Report Data Dialog Box**

5. Look at the bottom of the **Open Report Data Dialog** box. You will see four option buttons that are described below:

### **New Report Data.**

Clicking this button displays the **New Report Dialog** box, which allows the creation of a new application file. The dialog box displays areas for the report type, as well as areas for entering a descriptive name for the application, a file name, and comments. Any descriptive name may be assigned to a new application file, as long as it is unique to the submission list and not blank. It is a good idea to use a name that distinctly identifies the application. Use alphanumeric characters for file names.

### **Open**

Clicking this button closes the **Open Report Data Dialog** box, and opens the selected submission. In addition, double-clicking on a submission or pressing the **Enter** key while a submission is highlighted will also open the submission. (For complete information on creating or editing a submission, see *Preparing a Submission*, beginning on page 35.)

### **Cancel**

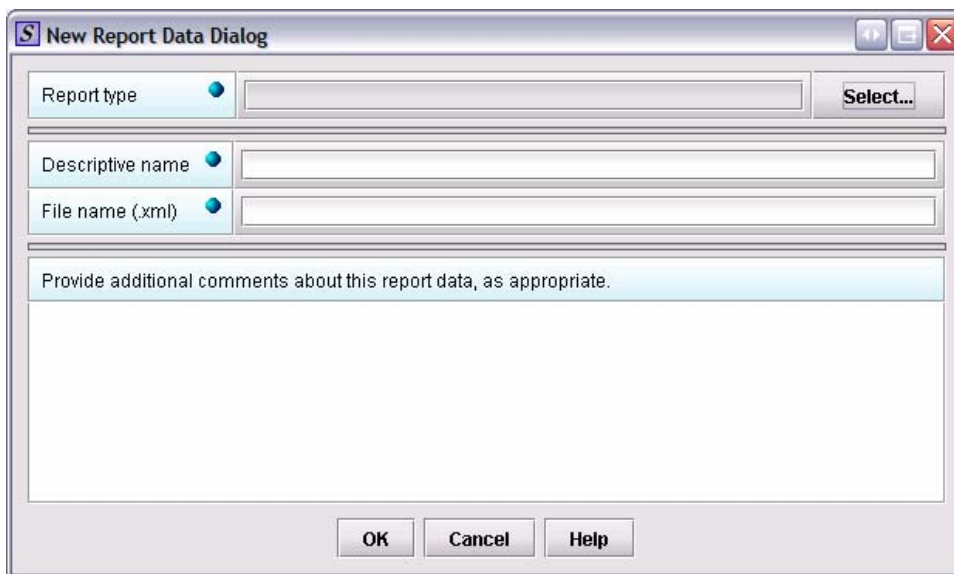
Clicking this button closes the **Open Report Data Dialog** box with no changes to the screen.

### **Help**

Clicking this button displays the help text for the **Open Report Data Dialog** box.



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6. If this is the first time that you started up the application after installing the software, click **New Report Data** to create a new submission. You see the **New Report Data Dialog** box as shown in *Figure 6*.



**Figure 6: New Report Data Dialog**

7. On this dialog box:
- Click **Select** from the **Report type** to select from one of two options:
    1. NCS Adjunct Studies Preliminary Application OR
    2. NCS Adjunct Studies Full Application
  - In **Descriptive name**, type a name for the application. Any descriptive name may be assigned to a new application file, as long as it is unique to the submission list and not blank. It is a good idea to use a name that distinctly identifies the report.
  - In **File name**, type the corresponding name for file. Use alphanumeric characters for file names.
  - In the comment section, type any additional information about the report that you wish.
  - Click **OK** when you are finished entering the information. The dialog box closes, and you see the **Open Report Data Dialog Box** (*Figure 5*) with your new report already highlighted. To select, click **Open** and you see the first screen of the report.

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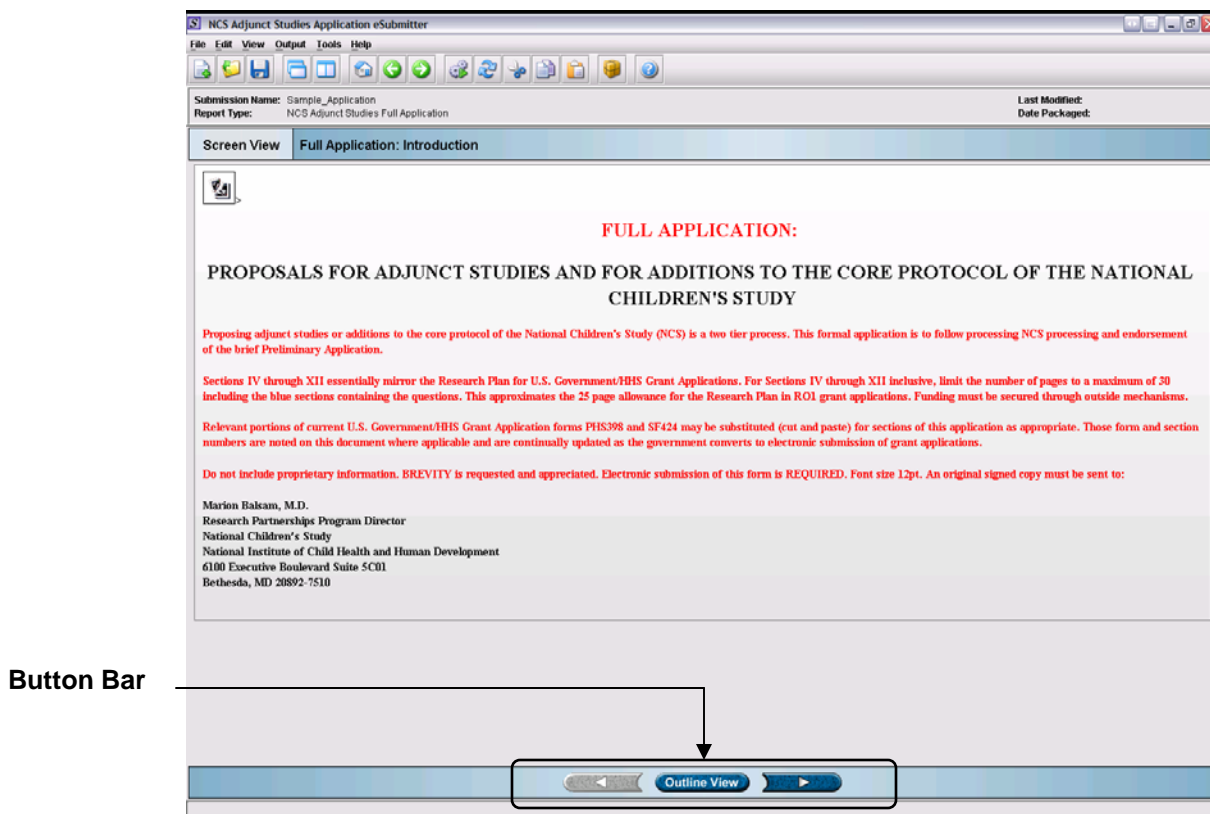
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## 4. INTERFACE

### 4.1 APPLICATION WINDOW

This section describes eSubmitter's Application Window and its different parts.

The eSubmitter Application Window has two layouts that change the orientation of the text on the screen: **simple** and **expert**. When you first start up the software, eSubmitter opens in the simple layout with a screen view. This view shows only the current data entry screen and "hides" an outline tree (which is similar to a folder or directory tree structure in Windows). To navigate through the screens in a report, click the arrow buttons on the button bar, which is located at the bottom of the screen in *Figure 7*.



**Figure 7: Simple Layout**

The expert view allows the user to navigate through the application form using an outline tree located on the left side of the screen. An example of the expert view is shown in *Figure 8*.

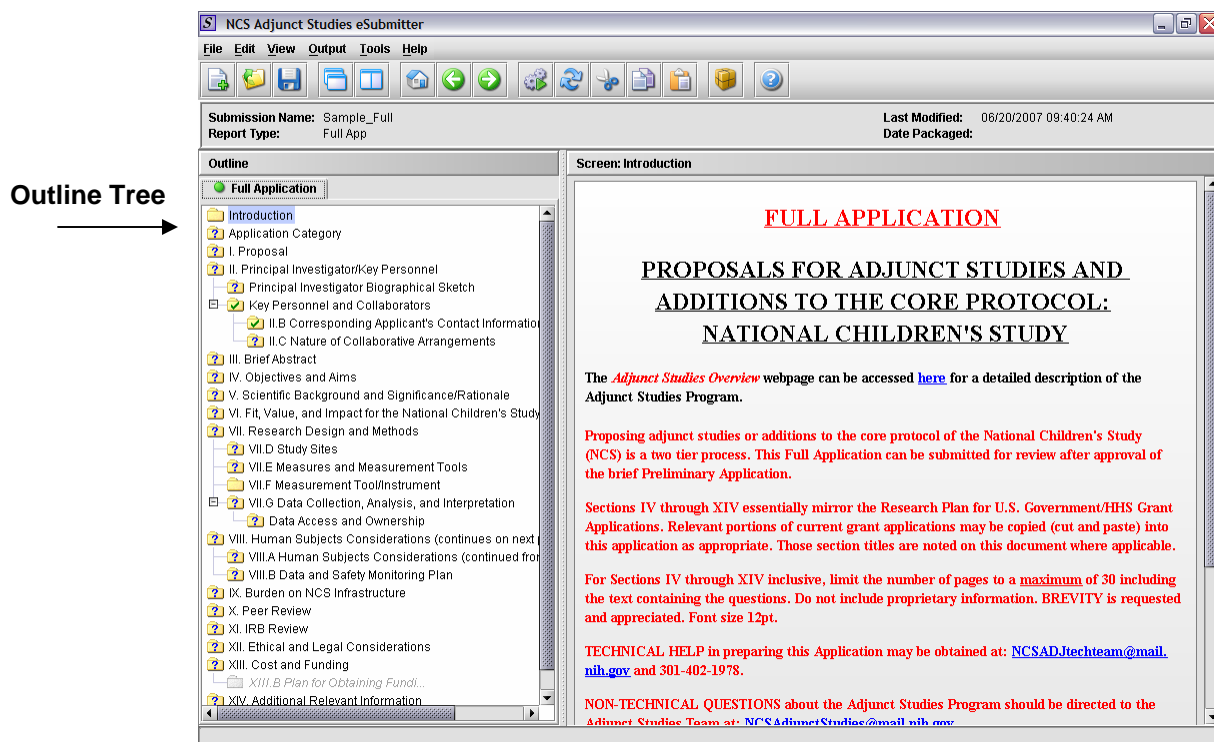


Figure 8: Expert Layout

Both layouts provide the same information. It is your choice as to which layout works best for you. You can switch between the two layouts very easily, as well as customize eSubmitter to open in the expert layout. For more information about simple and expert layouts, see *Menu Bar - View*, on page 18. To learn how to change eSubmitter so the application opens in the expert layout, rather than in the simple layout, see *Layout* in the User Preferences Dialog Box beginning on page 12.

The Application Window, whether in simple or expert layout, is divided into three parts, as shown in *Figure 9*.

- Menu Bar
- Tool Bar
- Primary Work Area

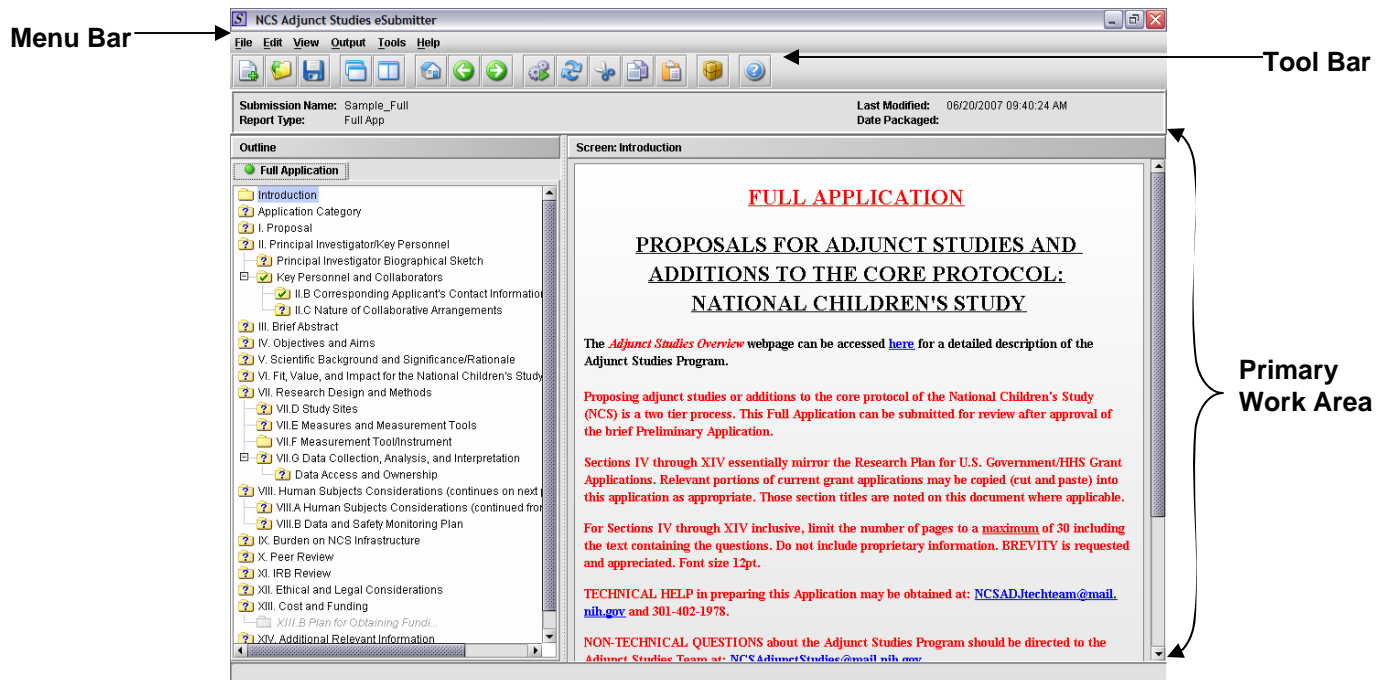


Figure 9: Parts of the Application Window

## 4.2 MENU BAR

The menu bar (*Figure 9*) is a horizontal bar residing at the top of the application window that contains various drop-down menus (listed below):

- File (see page 11)
- Edit (see page 18)
- View (see page 18)
- Output (see page 21)
- Tools (see page 22)
- Help (see page 26)

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### 4.2.1 Menu Bar - File

The **File** menu primarily provides an interface for operations that apply to an application. Each command on the **File** menu is described below:

**New** – Displays the **New Report Data dialog**, which allows a new (empty) application report to be created.

**Open** – Displays the **Open Report Data dialog** box, which allows an existing application to be selected and opened.

**Close** – Closes the application report that is currently open.

**Save** – Saves any changes within the open application report to permanent storage (e.g., to the hard drive).

**Note:** When a submission is open, all of the information associated with the submission is loaded into temporary memory. All data entry changes are recorded to this temporary memory.

**Save As** – Displays the **Save Submission As Dialog** box, which allows a new application report file to be created from the contents of the report file currently open (in other words, all the data from the open report is copied to create the new report). The dialog box displays areas for entering a descriptive name and comments. Remember that any name can be assigned to a new application report file, as long as it is unique to the submission list and not blank.

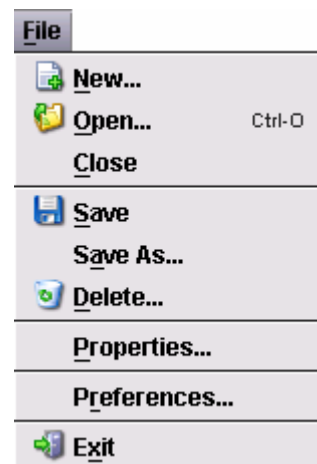
**Delete** – Displays the **Delete Submission Dialog** box, which allows the opened submission report file to be deleted. The dialog box displays basic information about the submission for verification purposes.

**Note:** Once an application is deleted, it is completely removed from the system. It is the responsibility of the submitter to maintain a record of all applications.

**Properties** – Displays the **Submission Report Properties dialog** box, which provides information about the application report that is currently open.

**Preferences** – Displays the **User Preferences Dialog** box, which allows you to turn auto-save on or off, specify whether eSubmitter will open in the simple or expert layout, and set up the application for use on a network. See *Figure 10*.

- **Auto Save** – When this option is enabled, eSubmitter automatically saves your report while you work. You can also set the interval for how often you want to save your report. At default, auto-save is automatically turned on, and set to save files at 10 minute intervals.



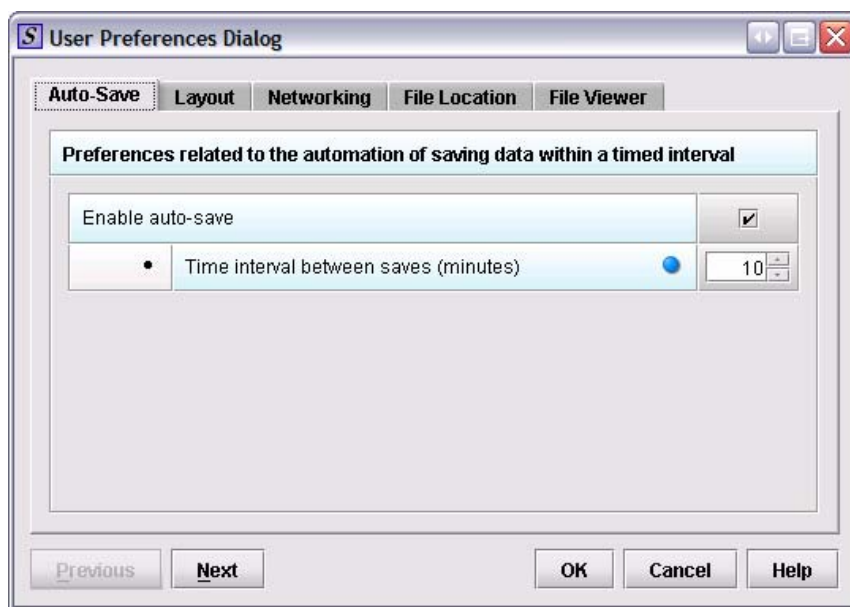


Figure 10: User Preferences Dialog Box

**To change the auto-save option:**

1. Click to select the enable auto-save checkbox (to turn auto save on) or click to clear the checkbox (to turn auto-save off).
2. If you cleared the checkbox, go to step 3. If you selected the checkbox, In the time interval box:
  - Enter the interval (in minutes) for often you want to save file.

**OR**

- Use the up and down arrows to select the interval.

3. If you want to change set the layout, click **Next** or the **Layout** tab. See the description for **Layout** below.

**OR**

- If you are finished and satisfied with your changes, click **OK** to close the **User Preferences Dialog** box.

**OR**

- Click **CANCEL** to close the **User Preferences Dialog** box without making any changes.

- **Layout** – allows you to set whether you want eSubmitter to open reports in the simple or expert layout when you start up the application. See Figure 11. At default, eSubmitter opens reports in the simple layout. For more information on the screen layouts, see the descriptions beginning on page 18.

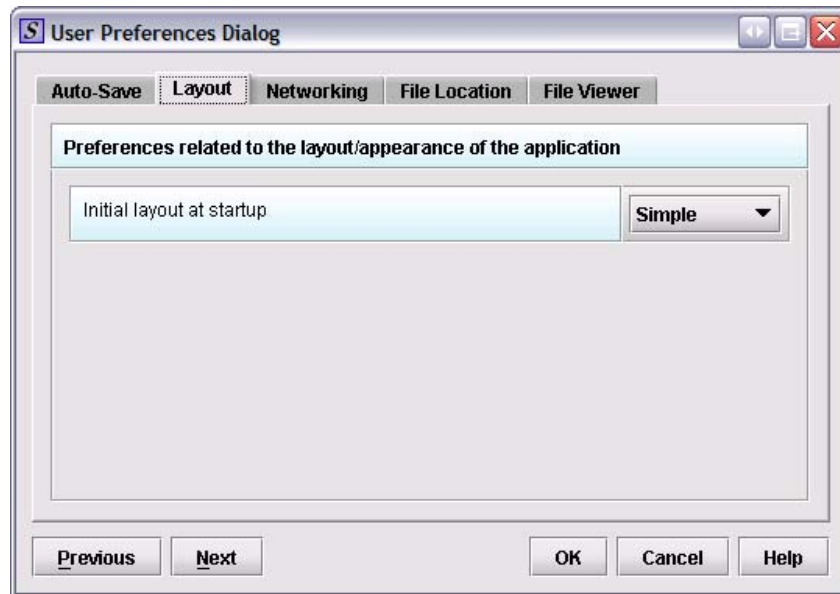


Figure 11: User Preferences Dialog Box, Layout Option

**To change the layout when eSubmitter starts up:**

1. In the initial layout box, click to select **Simple** or **Expert**.
2. If you want to change the settings for auto-save, click **Previous** or the **Auto-Save** tab. See the description for **Auto-Save** on page 11.

**OR**

- If you are finished and satisfied with your changes, click **OK** to close the **User Preferences Dialog** box.

**OR**

- Click **CANCEL** to close the **User Preferences Dialog** box without making any changes.

**Networking** – allows you to set file locking when using the software on a network. The application is primarily designed for use by one user at a time. However in an effort to support running the application from a network and in order to prevent users from accidentally over-writing the work of another, a simple file locking strategy has been incorporated. Warning message will be displayed to the user trying to open the file currently in use by another user when the file locking option is enabled (*Figure 12*). At default, eSubmitter opens without file locking.

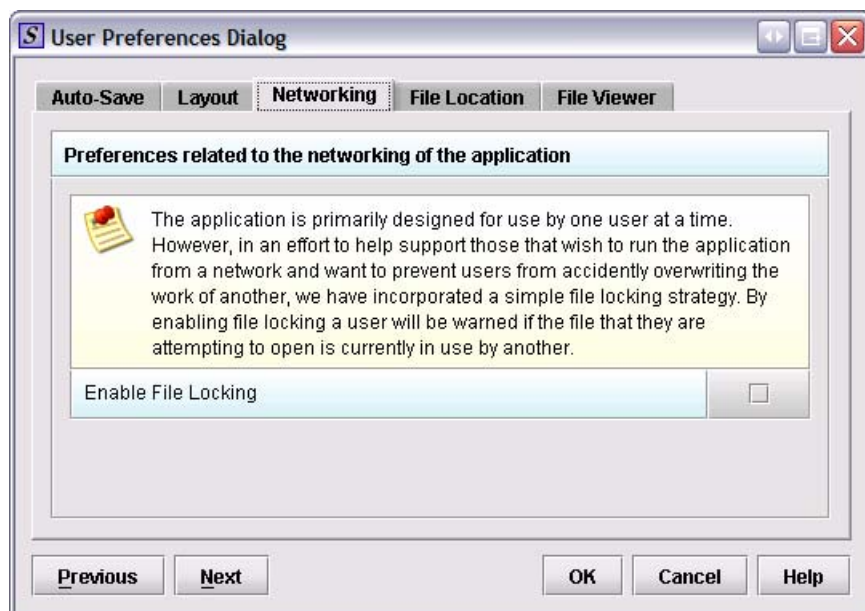


Figure 12: User Preferences Dialog Box, Networking Option

**To enable file locking:**

1. Click to select the **Enable File Locking** checkbox (to turn file locking on) or click to clear the checkbox (to turn file locking off).
2. If you are finished and satisfied with your changes, click **OK** to close the **User Preferences Dialog** box.

**OR**

- Click **CANCEL** to close the **User Preferences Dialog** box without making any changes.

- **File Location** – allows you to change location where your Data (Report) files and your Output (Packaged Application) files are stored. Click on the folder icon and navigate to the location where you wish to store your files.

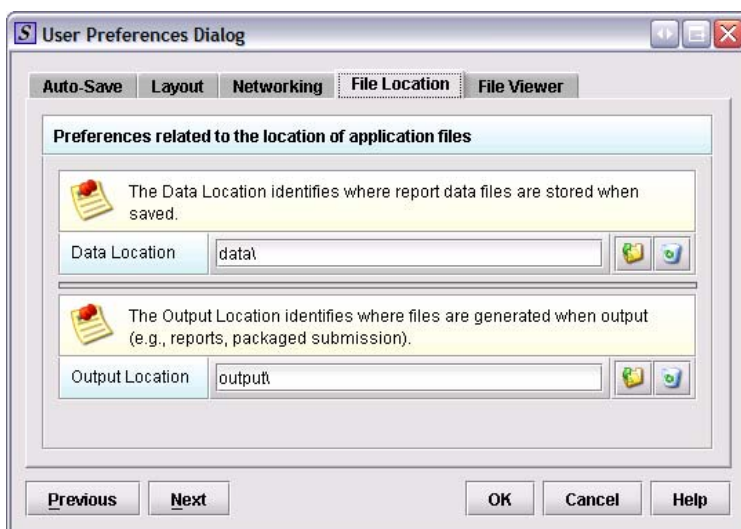
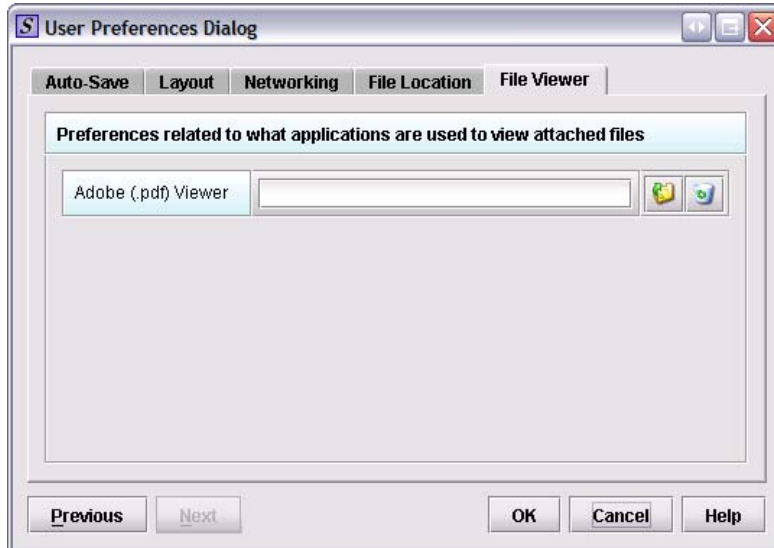


Figure 13: User Preferences Dialog Box, File Location Option



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- **File Viewer** – allows you to select the PDF viewer to be used while working in eSubmitter. Click on the folder icon and navigate to the location where your PDF viewer is stored. For more information, go to *Setting Up Your PDF Viewer* in the next section.



**Figure 14: User Preferences Dialog Box, File Viewer**

**Exit** – Exits the application software.

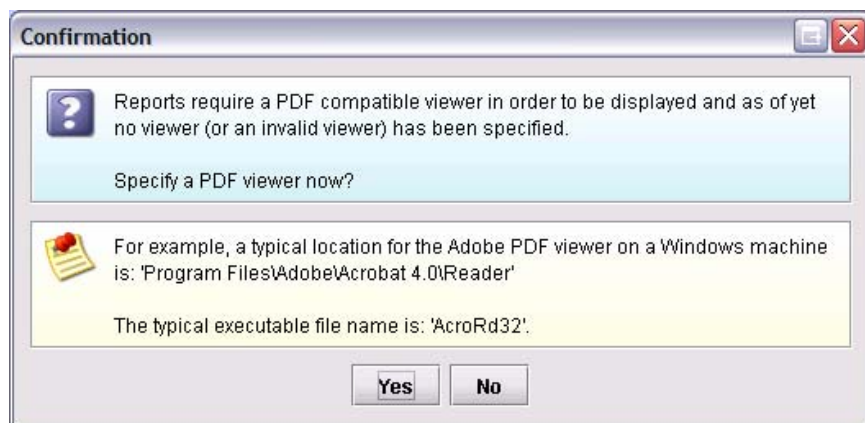
#### **4.2.1.1 Setting Up Your PDF Viewer**

To attach PDFs to your report, you must identify the application that you will use as your PDF viewer. (Generally, Adobe Acrobat is used as the software for viewing PDFs.) The first time that you try to attach a PDF in response to a question you will see a message asking you to specify the viewer. For ease in finding these instructions, they are placed in the beginning of the user guide. You will not need them until you try attaching a PDF to a question.

For information on responding to the questions in the application, see *Entering Application Information*, beginning on page 37.

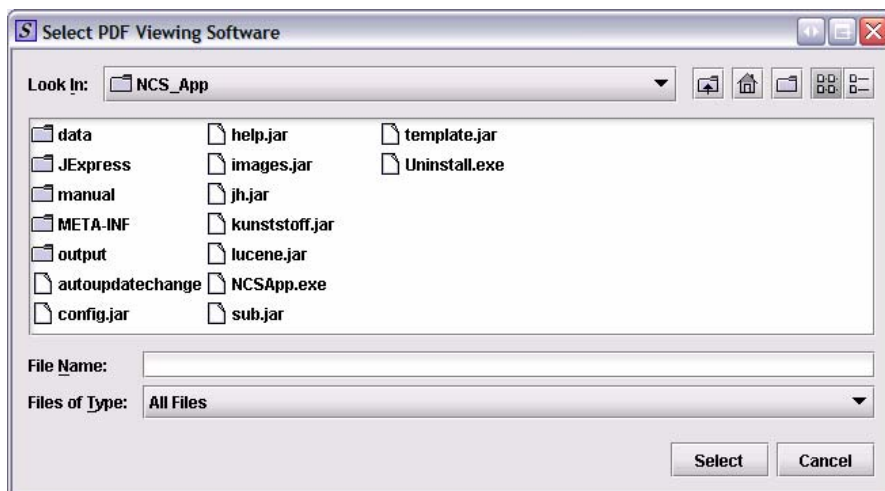
#### **To set up the PDF Viewer:**

The eSubmitter software should be open, and an application should be displayed. The software will try to generate a PDF of the blank report. You will see a confirmation dialog box asking you to specify the PDF Viewer (as shown in *Figure 15*).



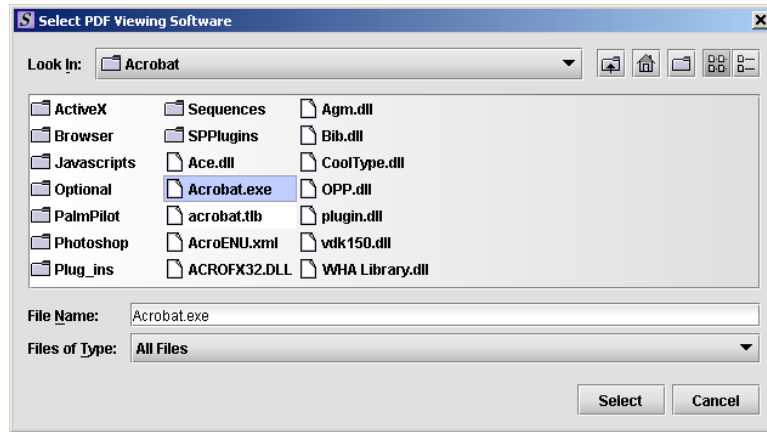
**Figure 15: Confirmation Dialog Box**

1. On this dialog box, click **Yes** and you will see a dialog box similar to the one shown below:



**Figure 16: Select PDF Viewing Software**

2. On this dialog box:
  - Click in the **Look In** box, and navigate to the file folder for Adobe. The location is usually:  
**Program Files > Adobe > Adobe 5.0** (or 6.0, depending on the version that you have installed) **> Adobe**
  - Click to highlight (select) **Acrobat exe**, and click Select. (See *Figure 17*.)



**Figure 17: Select Acrobat.exe**

3. The software will create a PDF of the blank report. After the PDF opens on your screen, close it without saving.

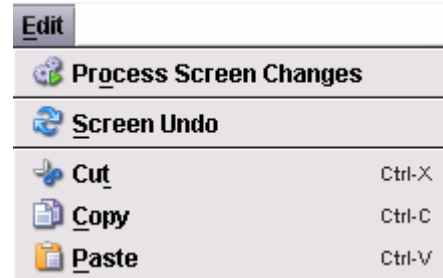
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## 4.2.2 Menu Bar - Edit

The **Edit** menu includes general purpose editing commands, which are described below:

**Process Screen Changes** – Processes your changes to the screens without saving the report or selecting another node. This option allows you to see your changes quickly.



**Screen Undo** – Refreshes the data in the data entries displayed within the screen area with their initial values before you made any changes.

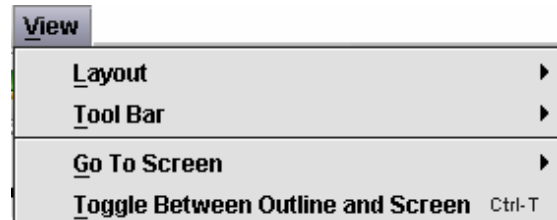
**Cut** – Removes the selected text from within the data entry area that currently has the focus, and transfers it to the system clipboard.

**Copy** – Copies the selected text from within the data entry area that currently has the focus, and transfers it to the system clipboard.

**Paste** – Pastes the text from the system clipboard into the data entry area that currently has the focus.

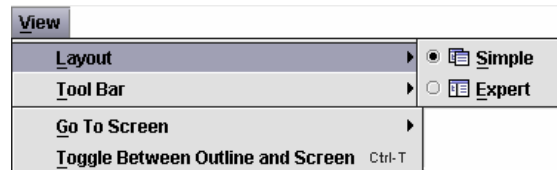
## 4.2.3 Menu Bar - View

The **View** menu includes general purpose commands for adjusting and moving around within the layout of the application window. Each command is described below:



**Layout** – Provides options for switching the orientation of the main workspace between two distinct layouts: **Simple** or **Expert**.

- **Simple** layout – Displays the current data entry screen and contains basic options for moving forward and backward through a report, one screen at a time. A view of the overall report outline is provided on a secondary screen.



This layout is most useful when stepping through the report sequentially and when viewing the application through a lower resolution display (i.e., more area can be dedicated to the data entry screen).

Use the buttons on the Button Bar on the bottom of the screen to move through the report or to display the outline. See *Figure 18* for a Simple layout with a Screen view. See *Figure 19* for a Simple layout with an Outline view. Each time that you start up the program, eSubmitter will open in a Simple layout with a Screen view. You can change this setting so that eSubmitter opens in the Expert layout, if you wish. For instructions, see *Layout* in the User Preferences Dialog Box, beginning on page 12.

To switch between the screen view and the outline view, click the **Outline** and **Screen** buttons, respectively.

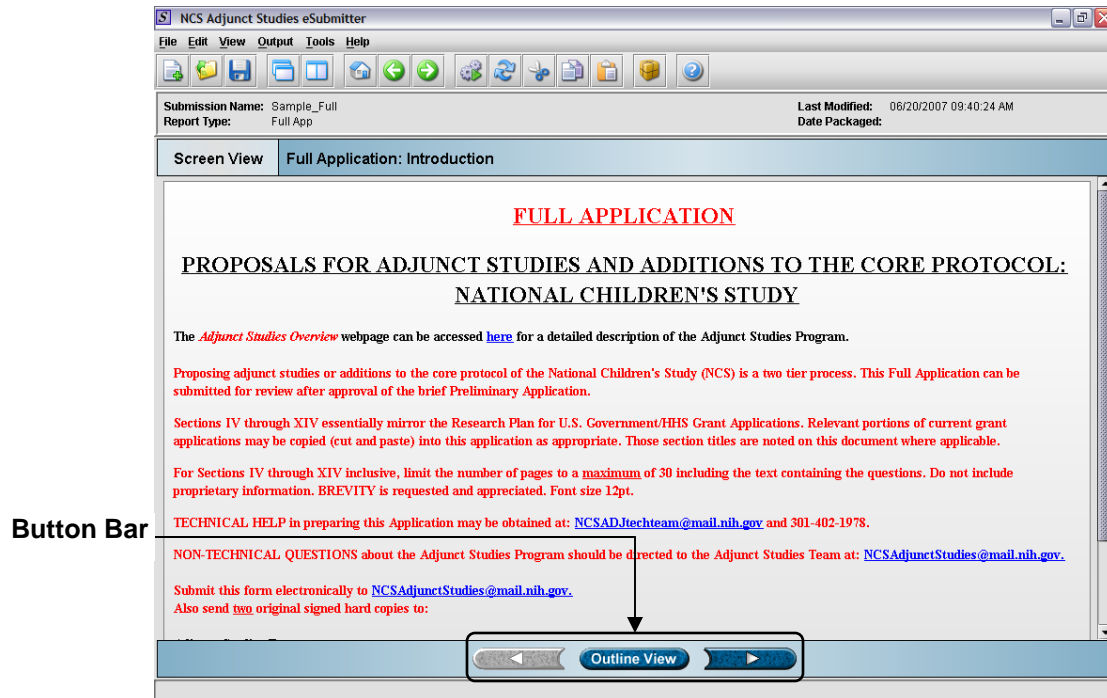


Figure 18: Simple Layout, Screen View

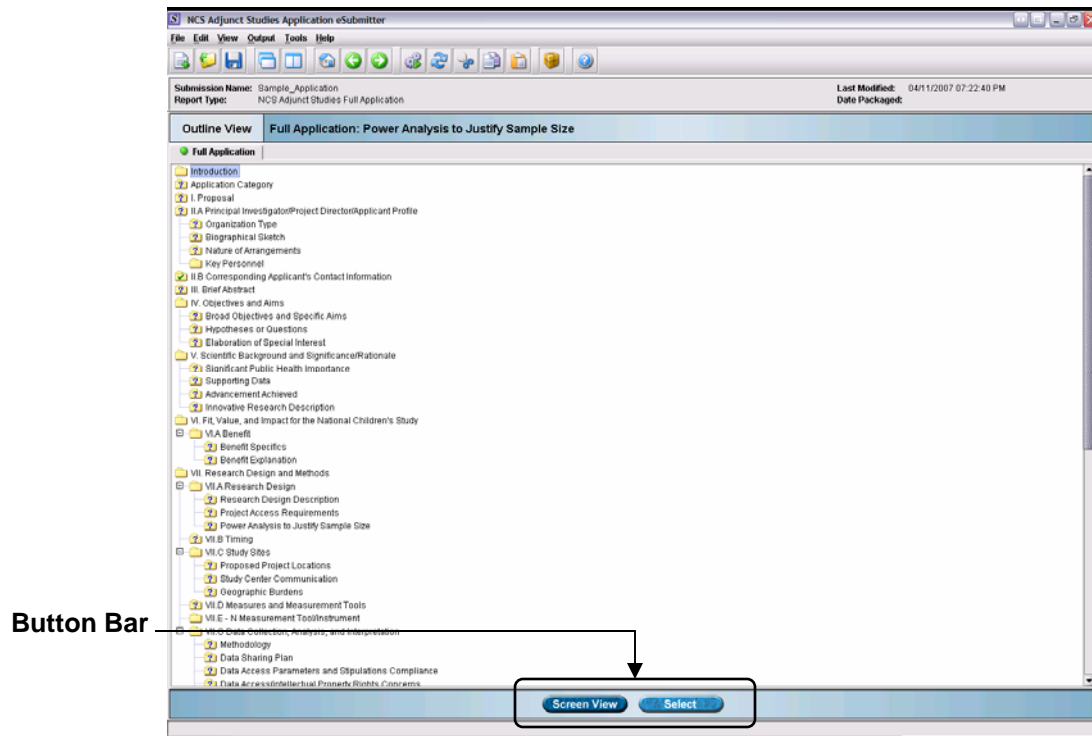


Figure 19: Simple Layout, Outline View

- **Expert** layout – Displays the overall report outline and current data entry screen side-by-side. This layout is most useful when additional display area is available. It also simplifies non-sequential movement through the report, such as updating various sections after the initial data entry is complete. *Figure 20* shows an Expert Layout.

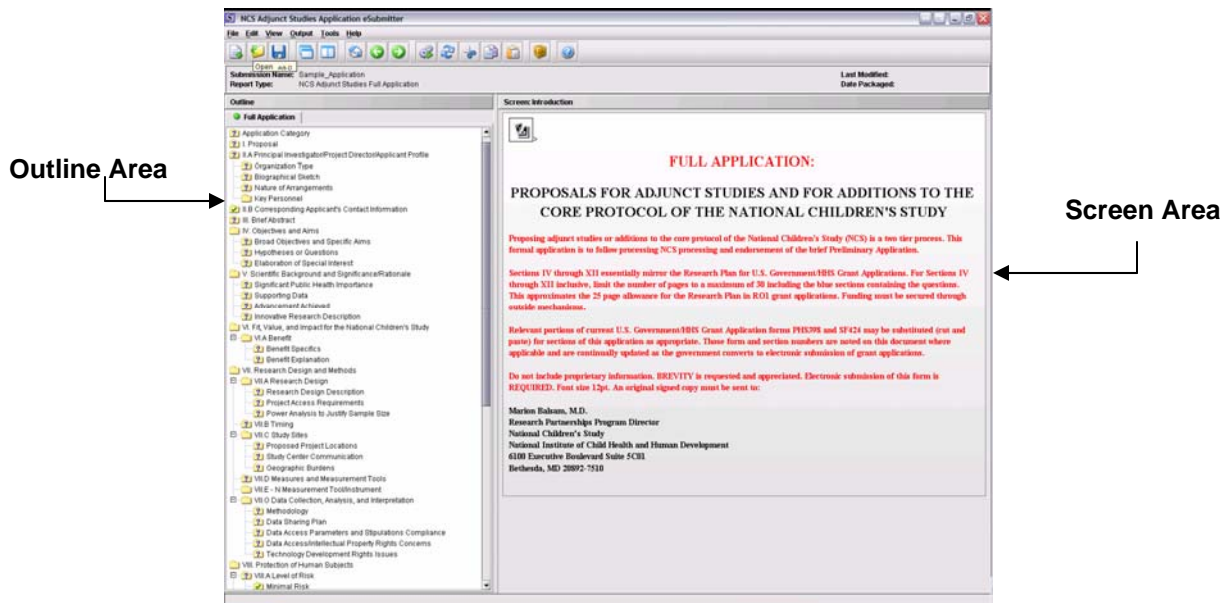
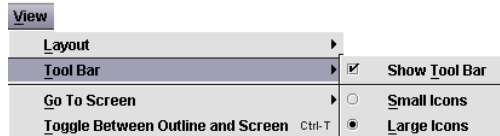
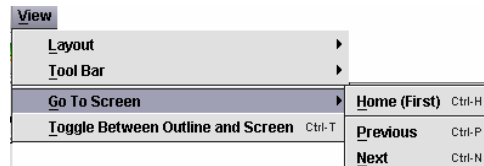


Figure 20: Expert Layout

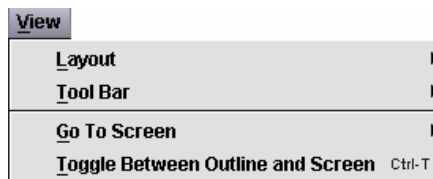
**Tool Bar** – Provides options for hiding and showing the tool bar, as well as, changing the sizes of the images within the tool bar buttons (i.e., small or large images).



**Go To Screen** – Provides options for moving directly to the first screen within the report, as well as the previous or next screen. Keyboard short-cuts for these options are also provided.



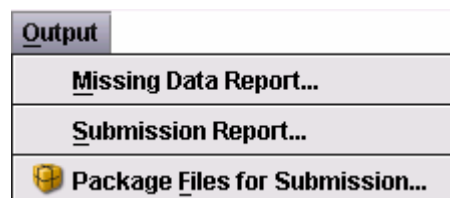
**Toggle Between Outline and Screen** – Switches the focus between the outline and the screen. Since there is a keyboard short-cut, this feature is most useful when attempting to quickly switch between the interface outline area and the screen area when using only the keyboard. This command is used with the Simple layout.



#### 4.2.4 Menu Bar - Output

The **Output** menu includes commands related to the output of reports for submission information.

**Note:** All report outputs are generated as HTML and require an application capable of viewing HTML output, such as a WEB browser, Adobe Acrobat or Acrobat Reader, or Microsoft Word. When you select an item from the **Output** menu you will see a **Report Output Dialog** box, which allows you to select your HTML viewer.



Each command on the **Output** menu is described below:

**Missing Data Report** – Provides a list of required questions that you have not yet answered. The list is provided in HTML format. You can save the report file at any time. However, you will not be able to create a submission file to submit to NICHD until there is no missing data. For more information on viewing a missing data report for your submission, see the *Missing Data Report* section, beginning on page 47.



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**Submission Report** – Views/prints out the submission report with your entries in HTML.

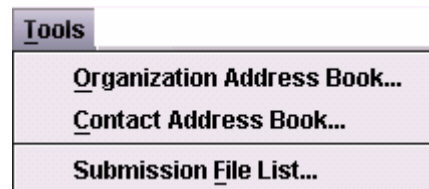
**Package Files for Submission** – Displays the **Package Files for Submission Dialog** box, which creates all the files that are required for submitting an application report to NICHD. However, the submission data files will only be generated when no required data is missing from the report. See the *Packaging Submission Files* section beginning on page 50 for detailed instructions on preparing your files for submission.



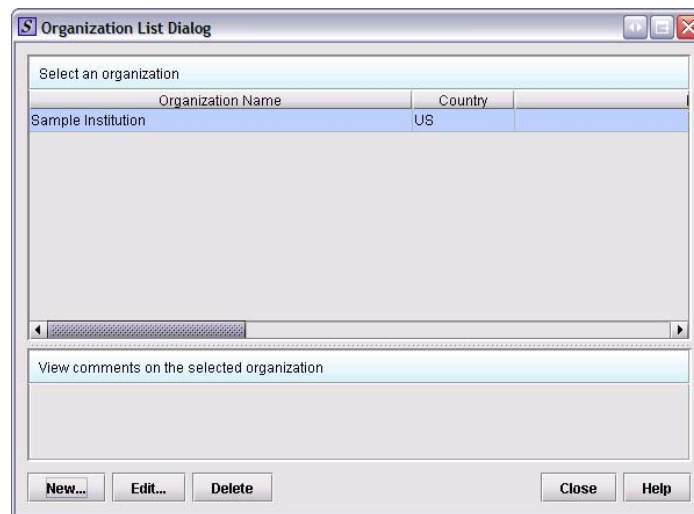
#### 4.2.5 Menu Bar - Tools

Each command on the Tools menu is described below:

**Organization Address Book** – Displays the **Organization List Dialog** box, which provides the ability to maintain the addresses of the pertinent facilities associated with your applications.



You only need to enter each company name and address once into the Organization Address Book, then select the appropriate entry in response to each question. If the mailing address is the same as the physical address, the physical address can be copied into the mailing address fields. If they are similar but not exactly the same, it can be copied, and then edited. The Organization Address Book will always be accessible for future reports, and you can update it as needed. This should reduce confusing, misspelled, and redundant entries. *Figure 21* shows an example of an **Organization List Dialog** box containing an entry for an organization.



**Figure 21: Organization List Dialog Box**



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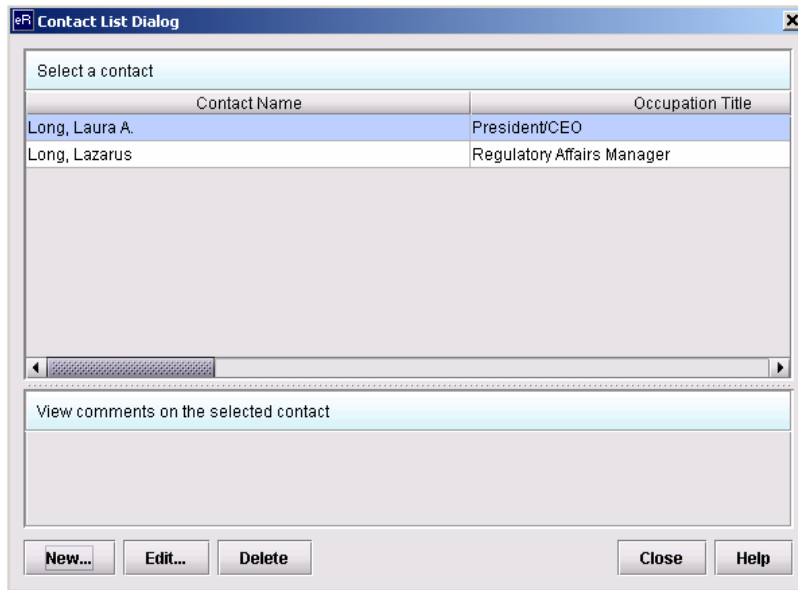
The **Organization List Dialog** box contains a list of all the available organizations and a comments area for viewing the comments on the selected organization. In addition, if you scroll across the organization list, you'll see fields containing basic identifier information about each.

The options (**New**, **Edit**, **Delete**, **Close**, and **Help**) in this dialog box are described below:

- **New** – Displays the **New Organization Dialog** which allows a new organization to be created. Enter information in the fields to identify a particular organization.
- **Edit** – Displays the **Edit Organization Dialog** box which allows the selected organization information to be changed. (You enter information in this dialog box in the same manner as the **New Organization Dialog** box.)
- **Delete** – Deletes the selected organization from the list.
- **Close** – Closes the dialog box.
- **Help** – Displays the **Help** window with help text.

**Contact Address Book** – Displays the **Contact List Dialog** box, which allows the names and addresses of the pertinent people associated with the application to be maintained. You need only to enter each person's name and contact information once into the Contacts Address Book, and then you can select the appropriate individual in response to each question. Existing organization addresses can be selected (from the Organization Address Book) for each contact. The Contact Address Book will be retained and accessible for future reports, and you can update it as needed. This should reduce confusing, misspelling, and redundant entries.

The **Contact List Dialog** box contains a list of the available contacts and a comments area for viewing the comments on the selected contact. In addition, if you scroll across the contact list, you will see fields containing basic identifier information about each contact. *Figure 22* shows an example of a **Contact List Dialog** box containing entries for contacts.

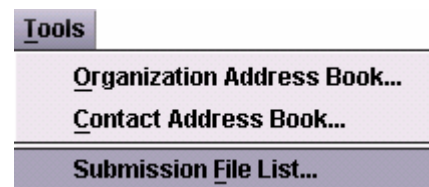


**Figure 22: Contact List Dialog Box**

The options provided in this dialog box are described below:

- **New** – Displays the **New Contact Dialog** box, which allows a new contact to be created.
- **Edit** – Displays the **Edit Contact Dialog** box, which allows the selected contact information to be changed.
- **Delete** – Deletes the selected contact from the list.
- **Close** – Closes the dialog box.
- **Help** – Displays the help window with this help text

**Submission File List** – Displays the **Master File List Dialog** box, which allows attached file information to be entered once for a submission but reused across questions in the report.



Attaching files requires software capable of viewing and/or printing PDF files (e.g., Adobe Acrobat).

**Note:** The file list is specific to the report that is currently open.

The **Master File List Dialog** box manages the file attachment information related to the open report. The dialog box contains a list of all the attached files that are currently

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available, an area for general information on the selected file, and options for managing the list. The file list displays the following for each:

- Descriptive title
- Physical file name
- Number of questions that currently reference the file as an attachment
- File date
- File size
- Language
- Path to the file location

Figure 23 shows an example of a **Master File List Dialog** box with an attachment listed.

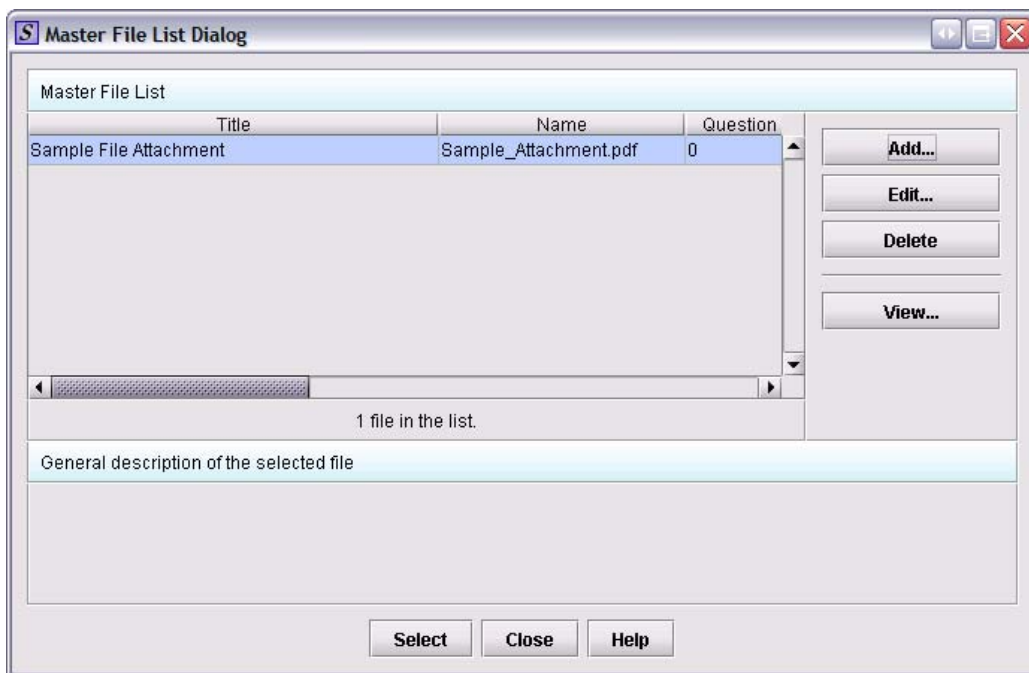


Figure 23: Master File List Dialog Box

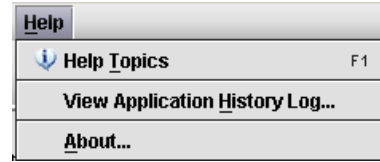
The options provided in the dialog box are described below:

- **Add** – Displays the **New File Dialog** box, which allows a new file to be added to the list of attachments.
- **Edit** – Displays the **Edit File Details Dialog** box, which allows the selected file title and general description to be changed.
- **Delete** – Deletes the selected file from the list.
- **View** – Displays the selected file within the specified viewer.

- **Close** – Closes the dialog box.
- **Help** – Displays the help window with this help text.

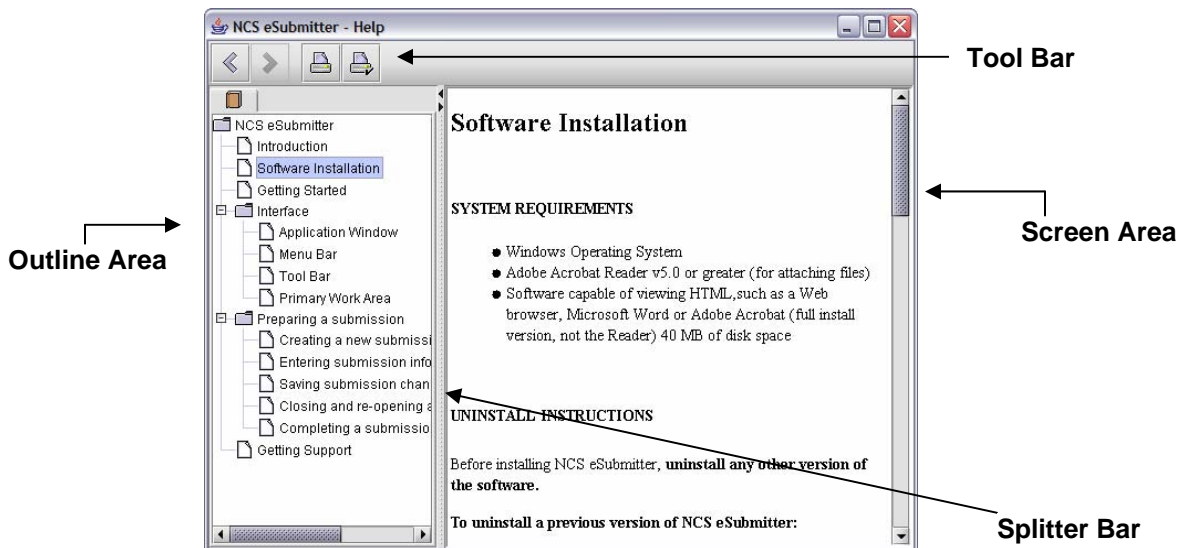
#### 4.2.6 Menu Bar - Help

The **Help** menu provides access to help information: **Help Topics**, **View Application History Log**, and **About**.



**Help Topics** – Displays the Help window as shown in *Figure 24*. The window contains a tool bar, outline area, screen area, and a splitter bar, which are described below:

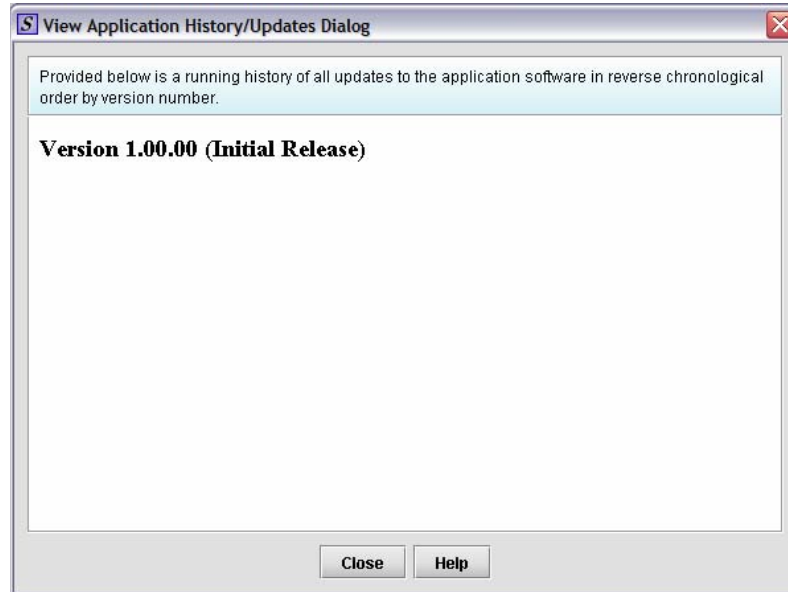
- **Tool Bar** - The tool bar provides options to move back and forth between topics (similar to the history in a browser, the back and forth buttons move between topics in the order they were viewed, not the order they appear within the outline), print the screen area, and set up the printer.
- **Outline Area** - The outline area contains a table of contents that lists the help topics.
- **Screen Area** - The screen area displays the help contents for the section selected in the table of contents.
- **Splitter Bar** - The splitter is the vertical bar between the outline and screen areas. By dragging the bar with the mouse left or right, you can control the proportion of the window that is allocated to each of the areas.



**Figure 24: Help Window**

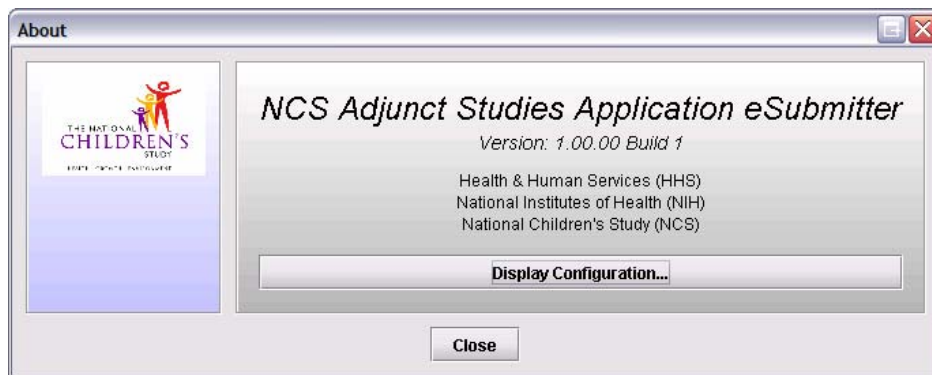
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**View Application History Log** – Displays the **View Application History/Updates Dialog** box which provides a history of changes to eSubmitter software. Changes will be listed in reverse chronological order by version number. See *Figure 25*.



**Figure 25: View Application History/Updates Dialog Box**

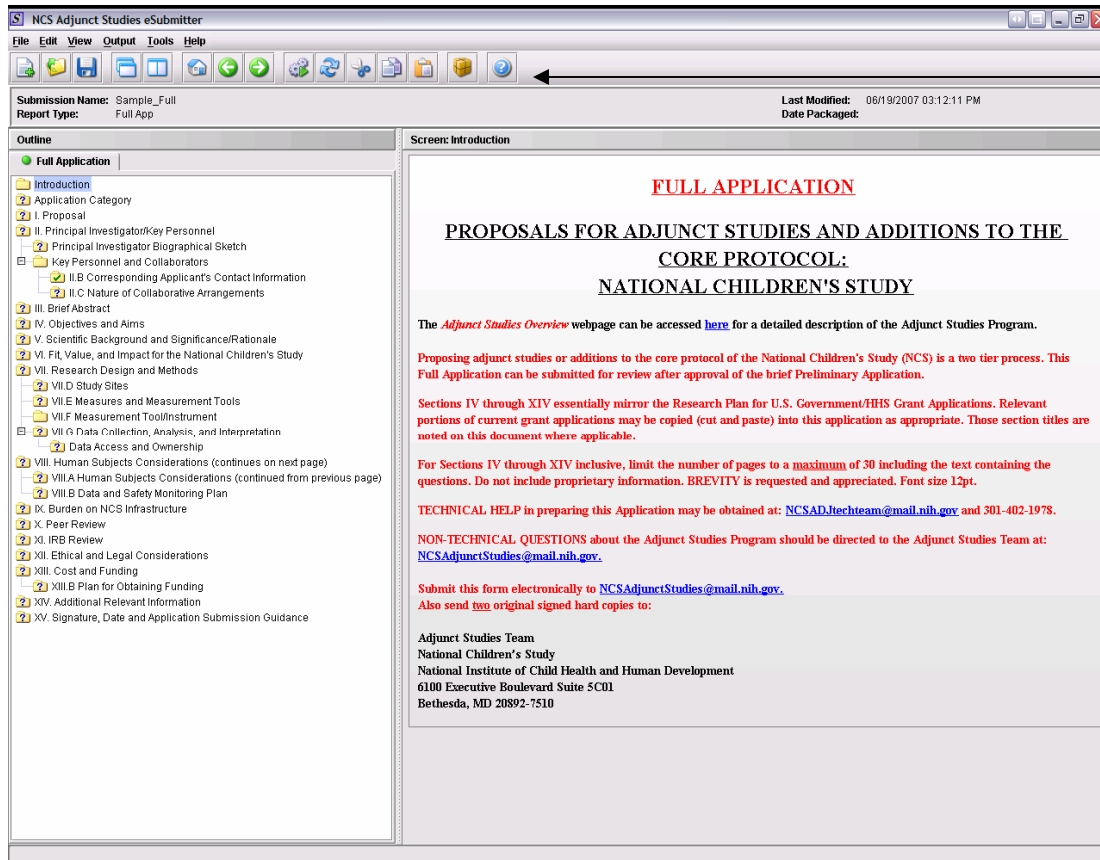
**About** – Displays the **About** dialog box which provides general information about the application. See *Figure 26*.



**Figure 26: NCS eSubmitter About Dialog Box**

### 4.3 TOOL BAR

The tool bar (*Figure 27*) is a row of buttons that are designed to provide quick access to specific or commonly used commands and options. The tool bar is located below the menu bar.



Tool Bar

Figure 27: Tool Bar

The buttons on the tool bar are grouped by functionality and are described below:

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## File Options



- **New** - Displays the New Submission dialog which allows a new (empty) submission to be created.
- **Open** - Displays the Open Submission dialog which allows an existing submission to be selected and opened.
- **Save** - Saves any changes within the open submission to permanent storage (e.g., to the disk)

## Layout Options



- **Simple** – Selects the simple layout, which displays the current data entry screen and contains basic options for moving forward/backward through the report one screen at a time.
- **Expert** – Selects the expert layout, which contains the overall report outline and current data entry screen side-by-side.

## Navigate Icons



- **Home** – Brings you back to the first (home) screen.
- **Previous** – Moves you to the previous screen.
- **Next** – Moves you to the next screen.

## Edit Options



- **Process Screen Changes** - Processes your changes to screens without saving the report or selecting another node. This option allows you to see your changes quickly.
- **Screen Undo** - Refreshes the data in all the data entries displayed within the screen area (the area to the right of the report outline) with their initial values before any changes were made.
- **Cut** - Removes the selected text from within the data entry area that currently has the focus and transfers it to the system clipboard.
- **Copy** - Copies the selected text from within the data entry area that currently has the focus and transfers it to the system clipboard.
- **Paste** - Pastes the text from the system clipboard into the data entry area that currently has the focus.

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## Package Files for Submission

- Allows you to package your application files to send to NICHD after you have answered all questions, and no data is missing. For complete information, see *Packaging Submission Files* on page 50.

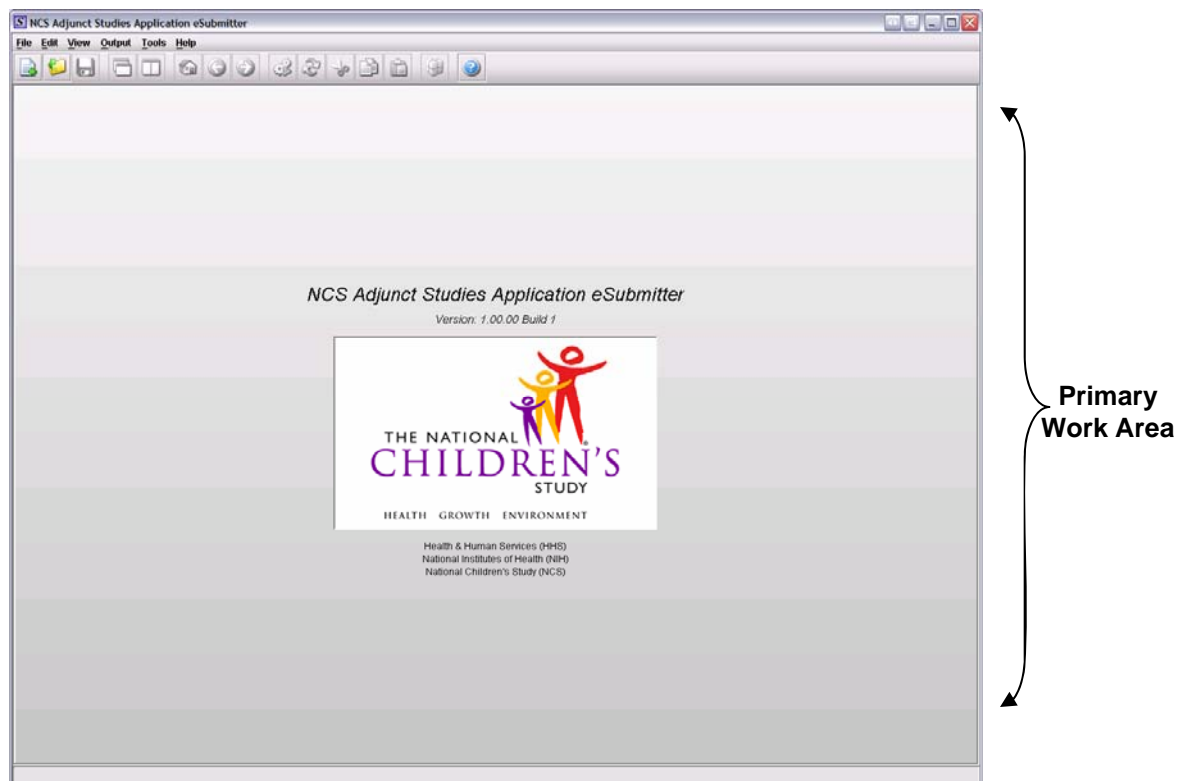
## Help Options

- **Help** - Displays the **Help** window and help topics.

## 4.4 PRIMARY WORK AREA

The primary work area is the section of the application window located between the tool bar and the status bar. This area contains either the **General Screen** or the **Application Display Screen**.

The **General Screen** is displayed when no report file is currently open and contains identification information about the eSubmitter application. See *Figure 28*.



**Figure 28: Primary Work Area in a General Screen**

The **Application Display Screen** is shown when an application file is currently open and contains identification information about the application. See *Figure 29*.



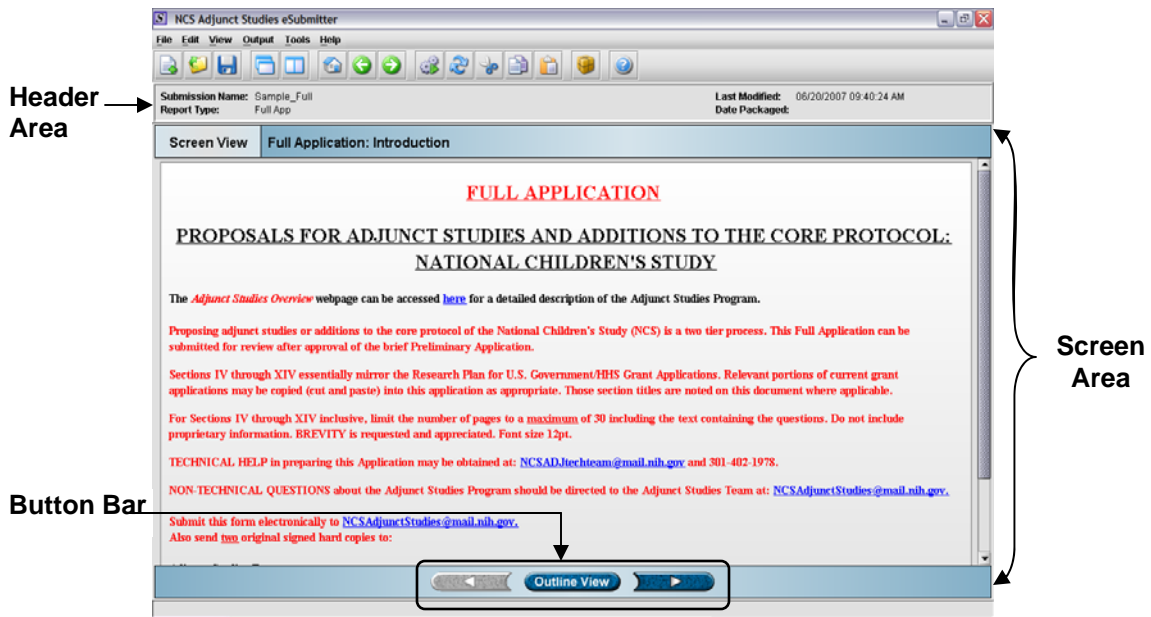


Figure 29: Simple Layout

#### 4.4.1 Layout of a Primary Work Area

The Application Display Screen is displayed in one of two layouts when a report is open.

**Simple layout** – separates the Application Display Screen into three additional areas (see *Figure 29*):

- **Header Area** (located at the top)
- **Outline Area** or **Screen Area** (located in the middle)
- **Button Bar** (located at the bottom), which allows forward and backward movement through the screens, as well as the ability to switch back and forth between the outline or screen view.

**Expert layout** – separates the Application Display Screen into four additional areas (see *Figure 30*):

- **Header Area** (located at the top)
- **Outline Area** (located at the left)
- **Screen Area** (located to the right)
- **Splitter Bar** (located between the outline and screen areas)

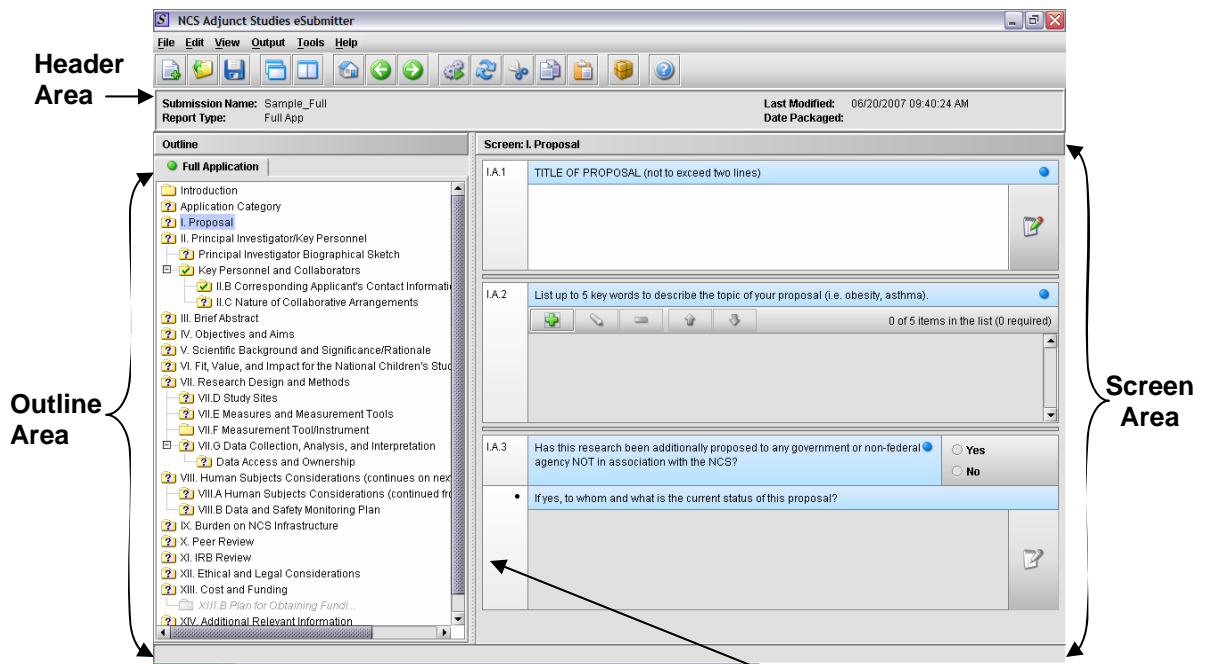


Figure 30: Expert Layout

#### 4.4.2 Parts of the Primary Work Area

The different parts of the Primary Work Area are defined as follows:

**Header Area** – Displays the following general information about the open submission:

- **Submission Name** – is the name that you created for the report.
- **Report Type** – will either be Preliminary Application or Full Application.
- **Last Modified** – represents the date and time the application data was last saved to the disk file. The date and time are automatically updated after each save.
- **Date Packaged** – represents the date and time the application files were packaged for submission to NICHD. The date and time are automatically set after the files are packaged in the application.

**Outline Area** – Displays tabs that organize the report into sections (see *Figure 30* and *Figure 31*):

Each tab within the outline has an image to the left of its descriptive text. This image depicts which tab contains the section that is currently displayed within the screen area (i.e., the tab with the highlighted green image).

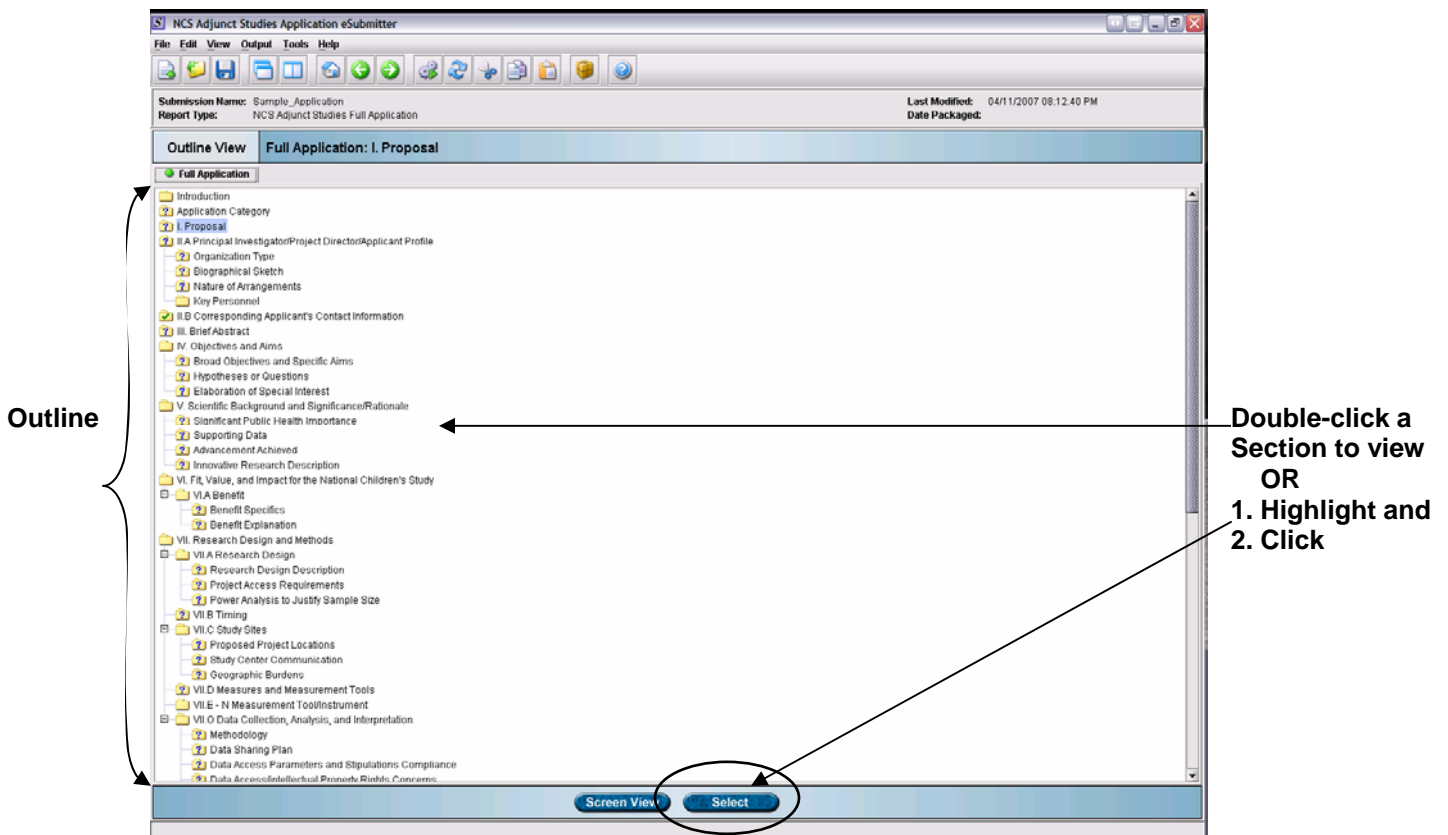
Each section within the outline contains a folder image to the left of the section text. This folder image depicts the status of required information that is missing from within the question responses of the section. For example:

- **Green check mark** indicates no required information is missing.

- **Blue question mark** indicates at least one item of required information is missing.
- **No mark** indicates that the section does not contain any required questions.

When in the Expert layout, activating a section within the outline area (by double-clicking or pressing the **Enter** key) will load the screen area to the right with the appropriate questions and responses associated with that section of the report. See *Figure 30*.

When in the Simple layout, activating a section within the outline view (by double-clicking a section or by selecting or highlighting the section, then pressing the **Select** button) will load the screen view with appropriate questions and responses associated with that section of the report. See *Figure 31* for an example.



**Figure 31: Outline View in the Simple Layout**

**Screen View** – displays the questions and responses associated with the selected section in the outline area. There is complete flexibility in maneuvering through the screen area. However, questions should be answered in order. Responses to some questions will determine whether further questions are required or even applicable, which means they may become disabled.

Some questions within the screen area may be required in order for the report to be considered complete. These questions are designated with a blue dot to the right of the

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question text. A complete list of required information that is currently missing from the report can be accessed by selecting the **Missing Data Report** option on the **Output** menu.

**Splitter Bar** – Is the vertical bar between the outline and screens areas in the Expert layout. By dragging the bar with the mouse to the left or right you can control the proportion of the window that is allocated to each of the areas. Adjusting this bar may be necessary on smaller monitors in order to improve readability of the text.

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## 5. PREPARING AN APPLICATION FOR SUBMISSION

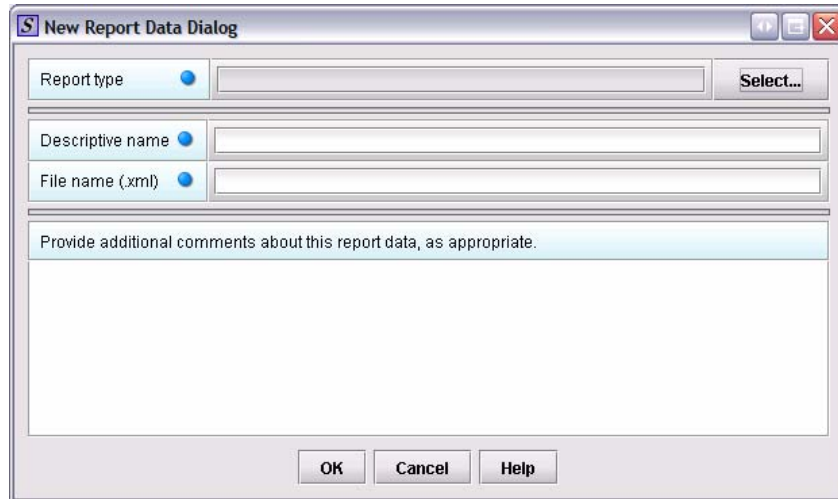
### 5.1 CREATING A NEW APPLICATION

This section provides an overview of completing an application.

**Note:** Before proceeding, make sure you have already reviewed the **Introduction**, **Getting Started**, and **Interface** sections of this user manual. These sections provide valuable information that is necessary in order to follow and understand the instructions in this section.

#### To create a new application:

1. The NCS eSubmitter application should be open on your computer desktop. If it is open, and you see the **General Screen**, go to step 2. If the application is not open:
  - Click **Start**, and select **Programs > NCS Report Submitter > NCS App**. You will see the **Welcome** dialog box (unless it is set to no longer display, see page 4).
  - When you are finished reading the **Welcome** dialog box, click **Close**. You see the **Open Report Data Dialog** box.
  - Click **New Report Data**.
  - Go to step 3.
2. Click **File > New**. (Or, click the New report icon  on the Tool Bar.)
3. You see the **New Report Data Dialog** box. An example is shown in *Figure 32*. Complete the fields on this dialog box as follows:
  - **Report type** – Select Preliminary Application or Full Application. If you have already submitted a Preliminary Application, you may select the Full Application. The Preliminary Application must be submitted prior to the Full Application. (This is a Required Entry, as indicated by the blue dot.)
  - **Descriptive name** – Enter any descriptive name, as long as it is unique to the submission list and not blank. Use a name that distinctly identifies the application to you. (This is a Required Entry, as indicated by the blue dot.)
  - **File name** – Enter a valid name for the application data. Use alphanumeric characters. (This is a Required Entry, as indicated by the blue dot.) **File names should not contain more than 250 characters. Do not use symbols when naming the files.** For example, do **not** use slashes (/) (\), tildes (~), asterisks (\*), periods (.), brackets [ ], single quotation marks (‘), double quotation marks (“) or parentheses ( ).
  - **Provide additional comments...** – Enter any additional information about this report (Optional Entry).




**Figure 32: New Report Data Dialog Box**

4. When you are finished entering information in the fields, click **OK**. The first screen of your new blank submission report is displayed and you may begin entering data into your application.

## 5.2 CREATING REVISIONS TO AN APPLICATION

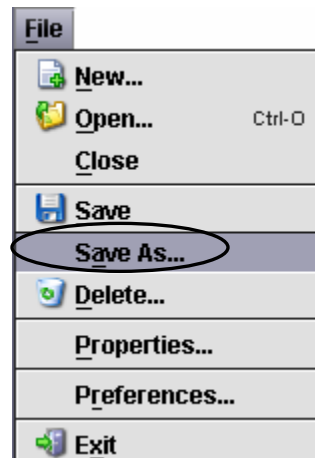
This section provides an overview on how to use the Save As functionality to create and submit revisions or supplemental information to an existing application.

1. Click **File > Open**. (Or, click the **Open** report icon  on the Tool Bar.)
2. Select the Original application file (previously submitted) from which you will revise the content and resubmit to NICHD.
3. Click **File > Save As**.

4. The **Save Submission As** dialog box will appear. You will be required to enter data into the following two fields:

- **Descriptive Name**
- **File Name**

5. The Application will open and the new file name will appear in the top right corner. All the data from the previous submission will be entered.



6. Revise the application as necessary and when you are finished, package the submission and send to NICHD. See *Completing an Application* for details on packaging and submitting your revised application to NICHD.

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## 5.3 ENTERING APPLICATION INFORMATION

Entering information for an application requires stepping through the report and answering questions. If you use the simple layout, you progress through the application screen by screen, ensuring that you have filled in all appropriate responses. If you use the expert layout, you progress through the report outline sections, activate each section to load the section questions and responses, and ensure that you have filled in all appropriate responses.

For additional information on the simple and expert layouts, see the *Primary Work Area*, beginning on page 30. You should follow the order of the sections as they are listed in the outline; the order has been set up to represent the most logical progression through the application.

### 5.3.1 Question Types

The NCS eSubmitter application uses several different types of questions to capture all the information that is required for a specific report. The response you enter depends on the type of question used in your particular report. For example, to answer a specific question, you may be required to select a response from a drop-down box, type in text, attach a separate PDF file, select a check box, or provide contact information.

This section describes several of the different question types and includes examples of their respective responses.

**Contact** – This question type requires that you enter contact information (first name, last name, etc.), address and phone numbers. You enter the information in text boxes and make selections using drop-down menus and clicking option buttons. Entries may or may not be required. An example is shown in *Figure 33*. Entries in a contact question can be copied from the Organization or Contact Address Book. *Figure 34* shows an example of the **Contact List Dialog** box that appears if you select **Copy Contact** on the Contact question. For more information about Organization and Contact Address Books, see page 22.)

Principal Investigator Contact Information		Copy Contact...
<b>Contact</b>		
Title (Mr., Ms., Dr.):		
First/Given Name:	<input type="radio"/>	
Middle Name:		
Last Name:	<input type="radio"/>	
Occupation Title:		
Email Address:	<input type="radio"/>	
<b>Address</b>		
Organization Name:	<input type="radio"/>	
Division Name:		
Country:	<input checked="" type="radio"/> United States of America <input type="radio"/> Other (select below)	
Address - Line 1:	<input type="radio"/>	
Address - Line 2:		
City:	<input type="radio"/>	
State, Province, or Territory:	<input type="radio"/>	
Post Office or Zip Code:	<input type="radio"/>	
<b>Phone Numbers</b>		
Telephone number:	<input type="radio"/>	( ) - - Ext: -
Fax number:		( ) - -

Figure 33: Example of a Contact Question

Select a contact

Contact Name	Occupation Title

View comments on the selected contact

View comments on the selected contact

New... Edit... Delete Select Close Help

Figure 34: Example of a Contact List Dialog

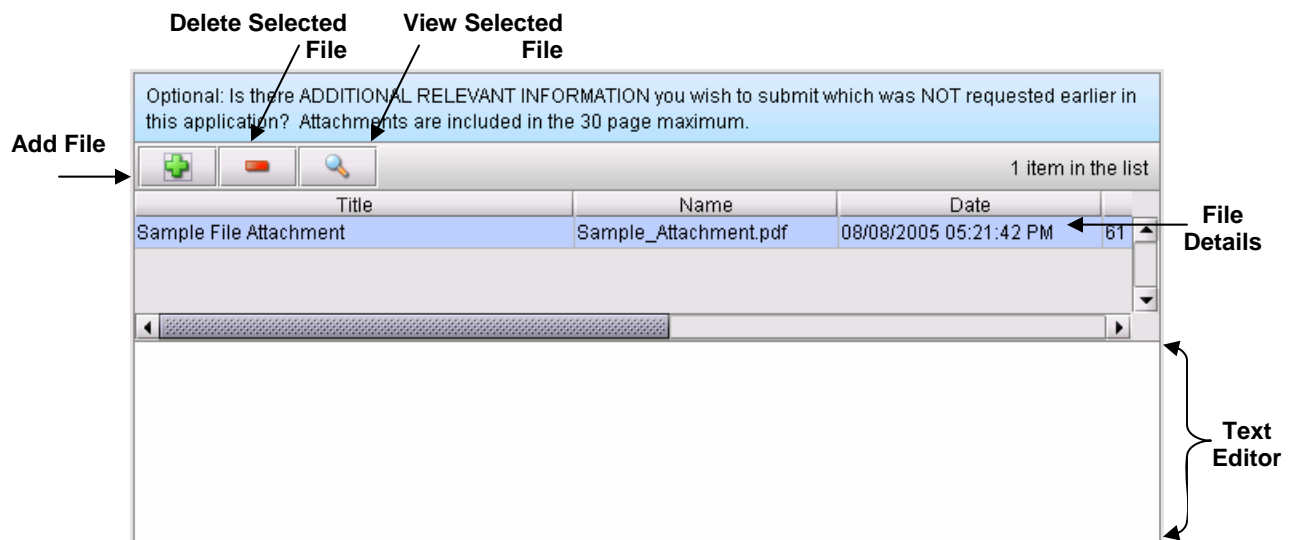


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**File Attachment** – This question type allows you to attach PDF files as a response. The question may contain a text editor that allows or requires you to type additional information. You may use this area to provide descriptive information or clarification, such as “see page 15 of the attached manual.” You may be required to enter the attachment or the descriptive text.

Attaching PDF files requires software capable of viewing and/or printing PDF files (e.g., Adobe Acrobat). The first time a PDF file is attached, the software will prompt you to locate the application within the system that will be used to view/print such files. Once identified, the software will no longer prompt for this information. For information on setting up your PDF Viewer, see page 15. *Figure 35* shows an example of an attachment question with a response entered.

**Note:** You may only attach files that are acceptable file types. These will be listed in the file attachment question type. **File names should not contain more than 250 characters. Do not use symbols when naming the files for attachments.** For example, do **not** use slashes (/) (\), tildes (~), asterisks (\*), periods (.), brackets [ ], single quotation marks (‘), double quotation marks (“) or parentheses ( ). Once the file is attached to a question, it can be selected as an attachment to other questions, if appropriate.



**Figure 35: Example of an Attachment Question**

**To attach a PDF file to an attachment question:**

1. Click the plus sign icon  to select the desired PDF file. You see the **Master File List Dialog** box.

- 
2. Click to select the desired file (if it is listed).  
OR  
Click **Add** to place another file in the list. You see a **New File Dialog** box. An example is shown below.

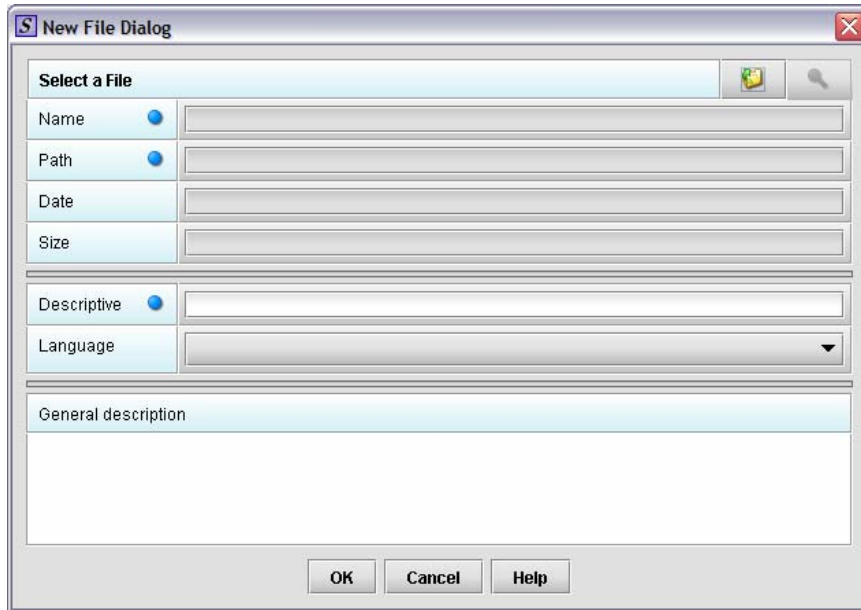



Figure 36: Example of a New File Dialog Box

3. Click the open folder button . You will see a **Select File** dialog box. An example is shown in *Figure 37*.

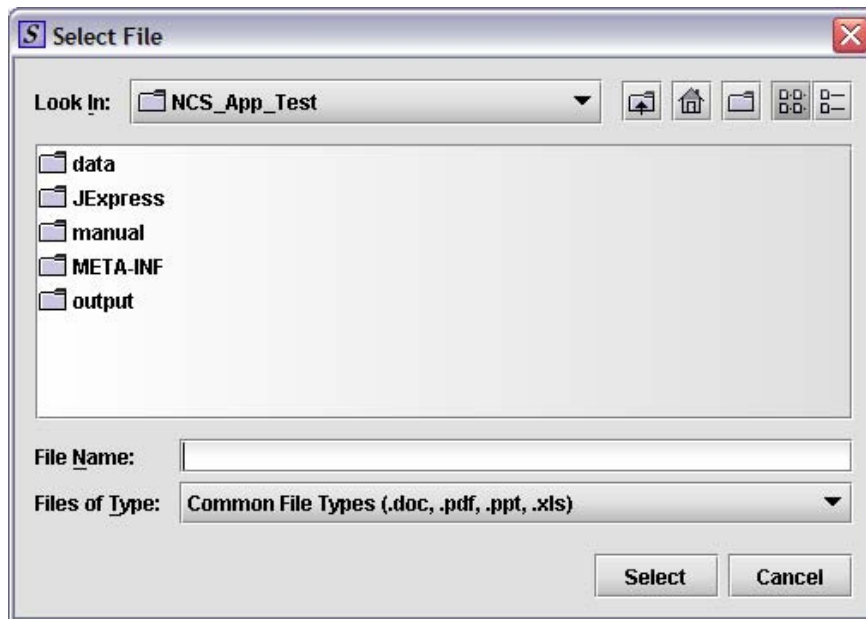
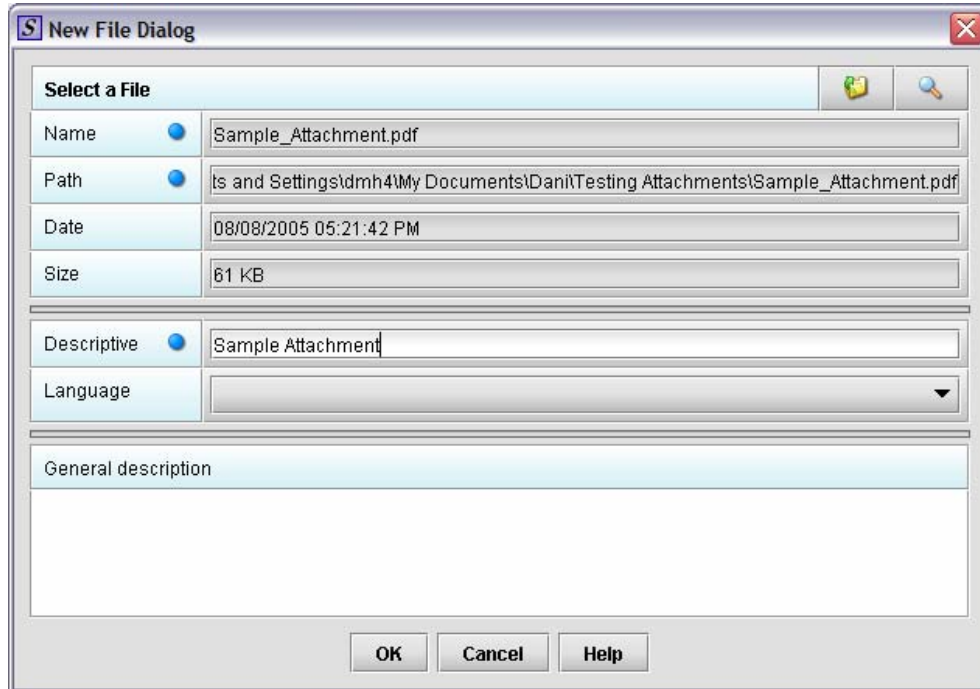


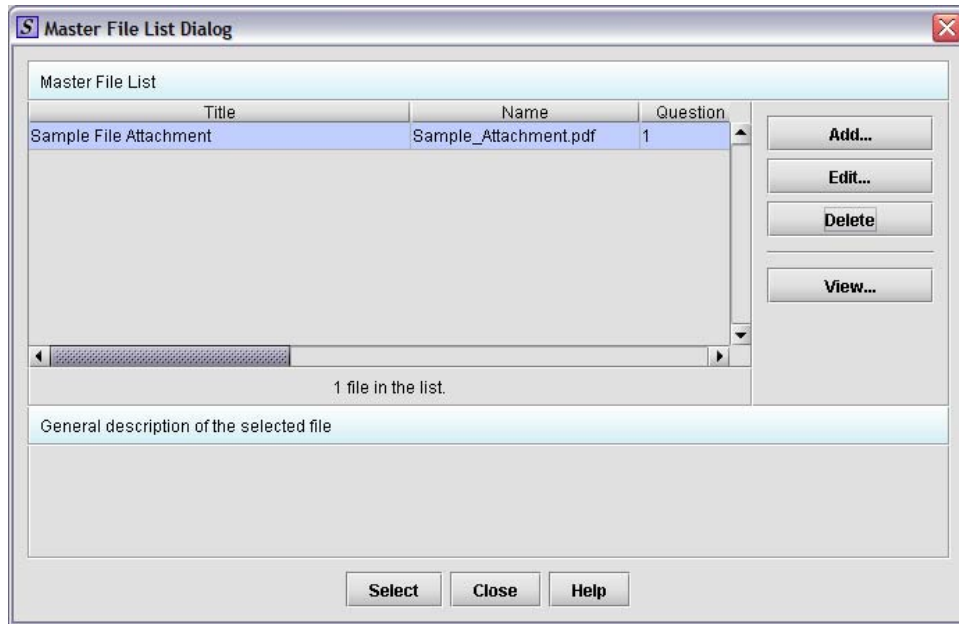
Figure 37: Example of a Select File Dialog Box

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4. Click in **Look In** to locate the drive, such as Local Disk (C:), or folder where the PDF is stored.
  5. When you locate the desired PDF, click to select it (highlight). The name of the file appears in **File Name**.
  6. Click **Select**. The **Select File** dialog box closes, and you return to **New File Dialog** box.
  7. Enter a title in **Descriptive title** (required entry) and a description in **General description**, if desired. See *Figure 38*.




**Figure 38: Add Description to File Attachment**

8. Click **OK**. You return to the **Master File List Dialog** box. The PDF that you just added is automatically selected (highlighted). See *Figure 39*.



**Figure 39: Master File List Dialog**

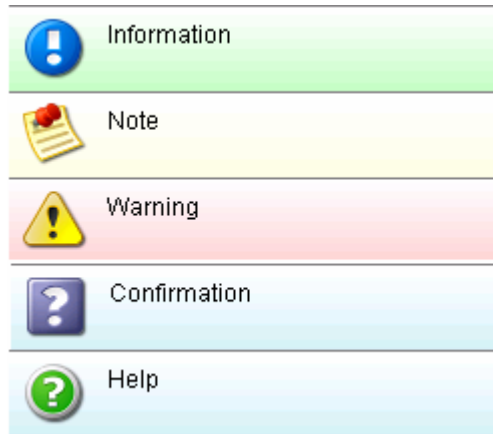
9. Click **Select**. You see information about the file appear in the question.
  10. To see additional information, use the scroll bar.
  11. Click the plus sign  and repeat steps 2 and 3 to add another file attachment.
  12. Repeat step 5 for each file that you wish to add.
- OR
- Click **Delete** to remove a file from the attachment question.
- OR
- Click **View** to see a PDF file in the list of files.

**Memo (Multi Line Text)** – This question type provides an area for you to enter several lines of text. See *Figure 40*.



**Figure 40: Example of a Multi-Line Text Question**

**Message** – This question type provides information to you as you complete an application. You may see several different types of messages as you progress through your submission. See *Figure 41* for examples of the different message types.



**Figure 41: Examples of Messages**

**Text, Single Line** – This question type allows you to type in text as a response. *Figure 42* shows an example of a text question.

**Figure 42: Example of a Text Question**

**Tabular Screens** – Entire screens may appear as a table. This format is indicated by a row of buttons for **New**, **Delete**, an up arrow and a down arrow. Directly below this row of buttons is the actual table. You also see **List** and **Details** tabs.

1. Click the **New** button to add an item to the table. You see a screen containing questions for you to answer. See *Figure 43* for an example.

Screen: Key Personnel and Collaborators

**II.A.4 Submit profiles and brief biographical sketches (2 page maximum) for other key personnel/significant contributors, noting their respective project roles. Click 'new' to add profiles.**

New Delete ↑ ↓

List Details

**Details on selected key personnel**

II.A.5 Contact Information Copy Contact...

Contact	
Title (Mr., Ms., Dr.):	Mr.
First/Given Name:	John
Middle Name:	M.
Last Name:	Smith
Occupation Title:	Researcher
Email Address:	J.Smith@sample.com

Address	
Organization Name:	ABC University
Division Name:	Research & Development
Country:	<input checked="" type="radio"/> United States of America <input type="radio"/> Other (select below)

Figure 43: Tabular Screen, Details View

2. Enter the necessary information and select **New** to create another entry in the table. See *Figure 44*.

**Note:** If you accidentally enter a blank into the table, (by clicking **New**, not responding to any questions, and then clicking **Details**), you will see a line of colored blank spaces. Select the line of colored spaces and click the **Delete** button to remove the item from the table.

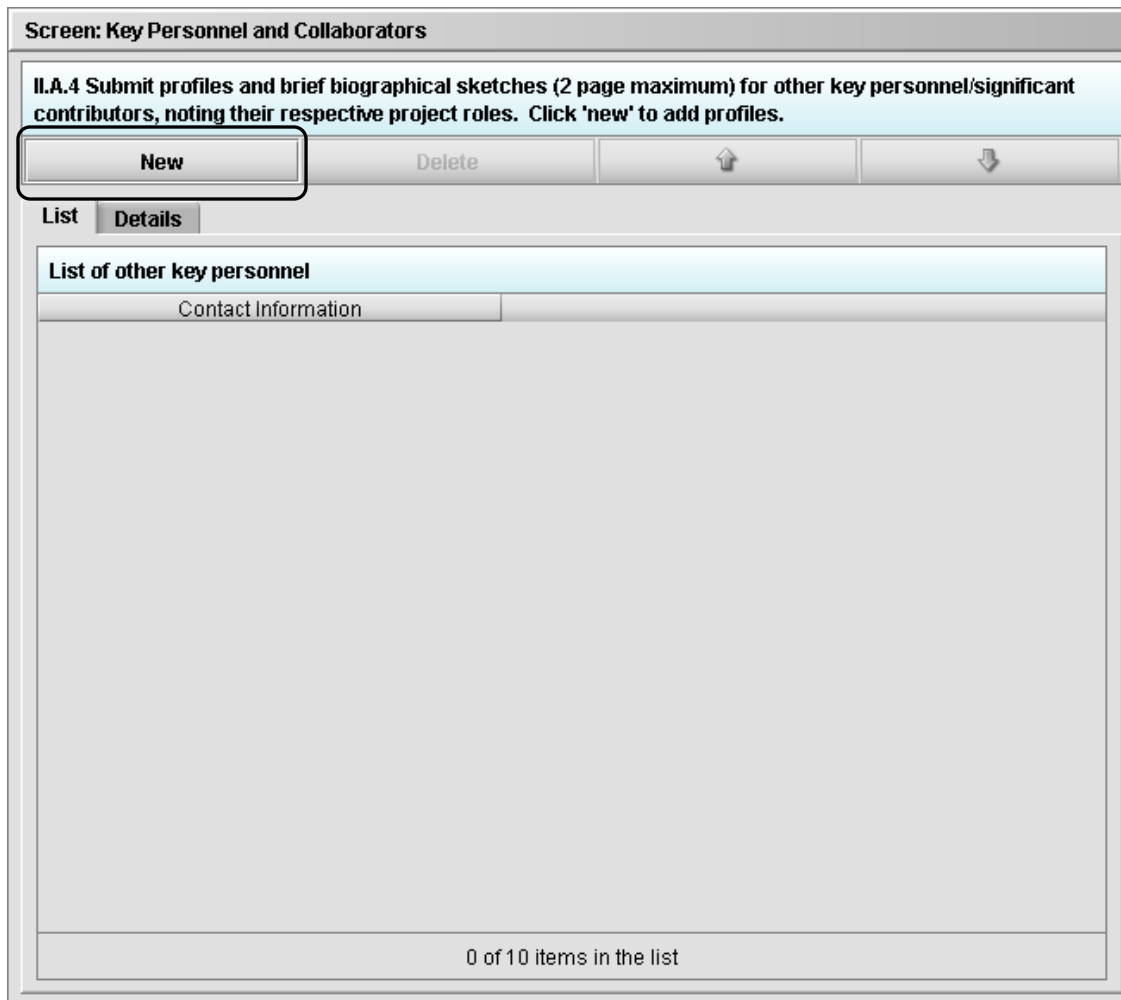


Figure 44: Tabular Screen, List View

3. In the **List** view, you will see that the data entered in the **Details** tab creates a table of table entries. *Figure 44* is an example of a Tabular Screen in the **List** view before any data has been entered. *Figure 45* is an example of a Tabular Screen in the **List** view that has two entries.

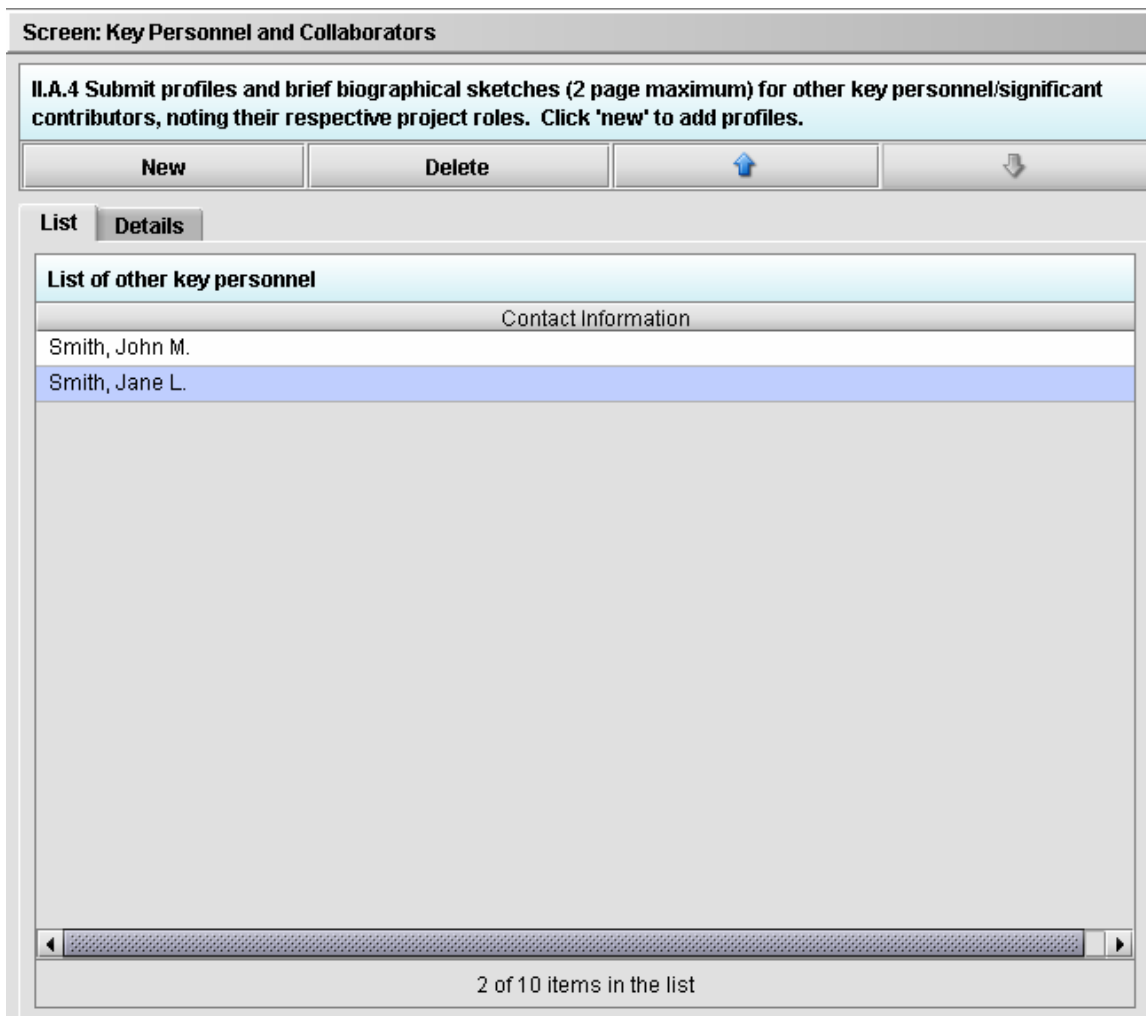


Figure 45: Tabular Screen Example

## 5.4 SAVING SUBMISSION ENTRIES OR CHANGES

While moving through the application, any changes made to question responses are automatically updated within memory (e.g., the user made a change to a question response, went to another section of the application, and returned to see that the changes to the response were still in effect). If you have auto-save turned off in **Preferences**, these changes are only saved permanently when you select the **Save** option from the tool bar or **File** menu. Therefore, follow the same guidance that you would use when saving data in other software. In other words, whenever you have entered an amount of data that would be frustrating to have to re-enter, select the save option. For information on changing auto-save preferences, see page 11.

**Note:** The software will remind you to save if data has been changed and you are about to perform an operation that would result in losing your changes, such as opening another submission or exiting the application.



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**To save a submission:**

- Click **File > Save**.

**OR**

- Click  on the tool bar.

You may not finish entering information into a submission in one session, so you may return to it at another time. See *Closing and Reopening an Existing Application*.

## **5.5 CLOSING AND REOPENING AN EXISTING APPLICATION**

**To close an application:**

1. Save the open application before you close it:

- Click **File > Save** on the menu bar.

**OR**

- Click  on the tool bar.

2. Click **File > Close**.

The General Screen is displayed with the NCS logo on the Splash Screen. You can close-out of the eSubmitter software.

**To re-open an existing application while the software is still open:**

1. Click **File > Open** on the menu bar.

**OR**

Click  on the tool bar.

You see the **Open Report Data Dialog** box.

2. Click to select (highlight) the application file name that you wish to open, and click **Select**.

The selected report is displayed.

3. When you have entered all the required information into the application, you are ready to package the application files.

## **5.6 COMPLETING AN APPLICATION**

To complete an application, you must identify if any data is missing from your report (and then enter the required data) and package the files for submission.

### **5.6.1 Missing Data Report**

You will only be able to package the application files for submission as long as no required data is missing. To determine if any data is missing, you will generate a **Missing Data Report**. To proceed, the desired application should be open and displayed on your computer screen.

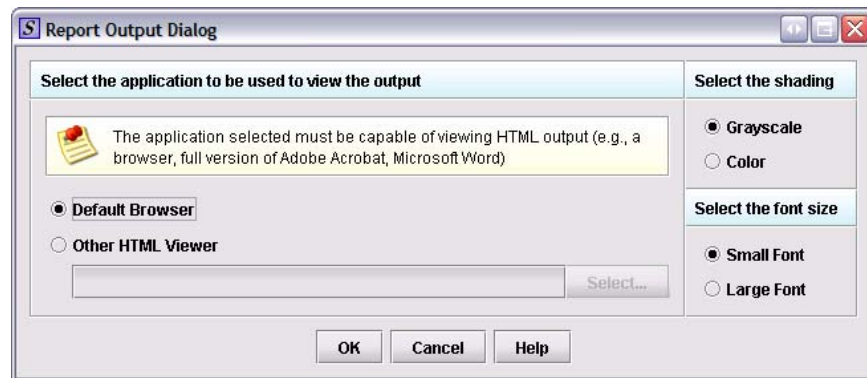
**Note:** All report outputs are generated as HTML and require an application capable of viewing HTML output, such as a WEB browser, the full version of Adobe Acrobat (not Acrobat Reader), or Microsoft Word.

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**To determine if required data is missing from the application:**

1. From the menu bar, click **Output >Missing Data Report**. (See also page 21.)

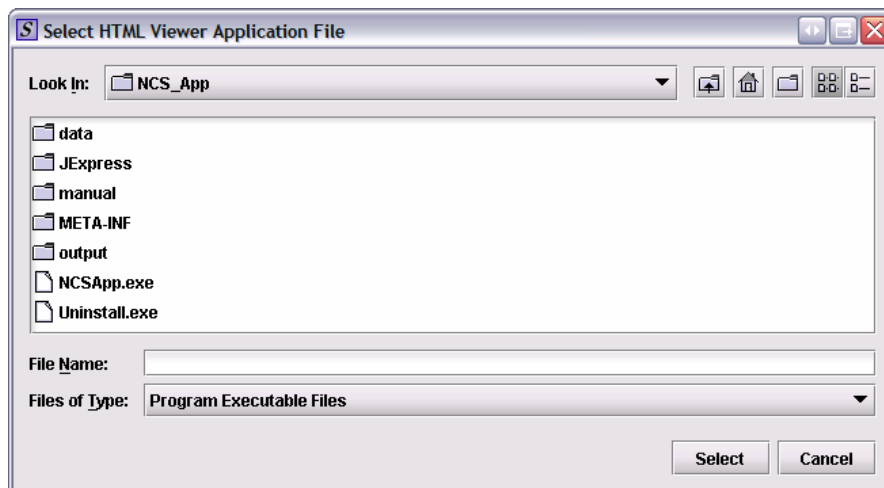
You see the **Report Output Dialog** box as shown in *Figure 46*.



**Figure 46: Example of a Report Output Dialog Box**

2. On this dialog box:

- Select the desired application to view the output in HTML:  
Click the option button: **Default Browser** or **Other HTML Viewer** (The default setting is your Web Browser.)  
⇒ If you selected **Other HTML Viewer**, the **Select** button becomes enabled. Click the **Select** button. You see the **Select HTML Viewer Application File** dialog box, as shown in *Figure 47*.

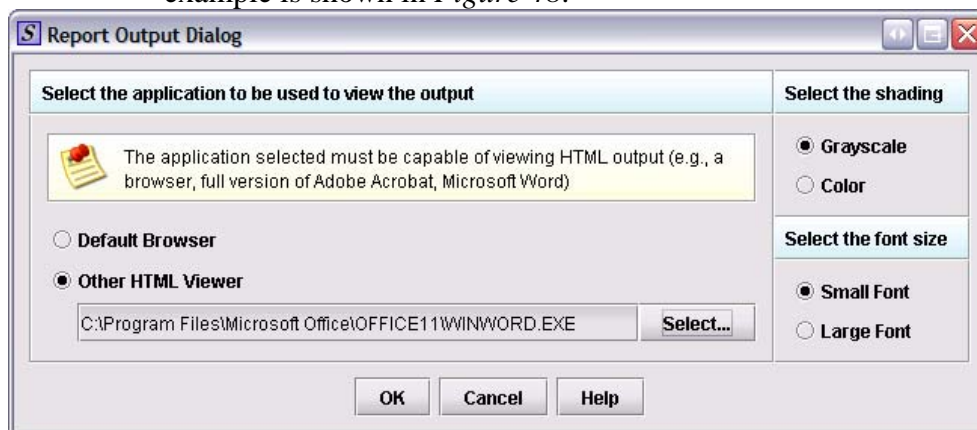


**Figure 47: Example of Select HTML Application File Dialog Box**

- ⇒ Click in the **Look In** box to navigate to the **executable** (.EXE) of the application to view the HTML. For example, if you want to view the missing data output report in Word 2002, you would navigate using the following path:

**C: > Programs > Microsoft Office > Microsoft Office > Office 10> WINWORD.EXE**

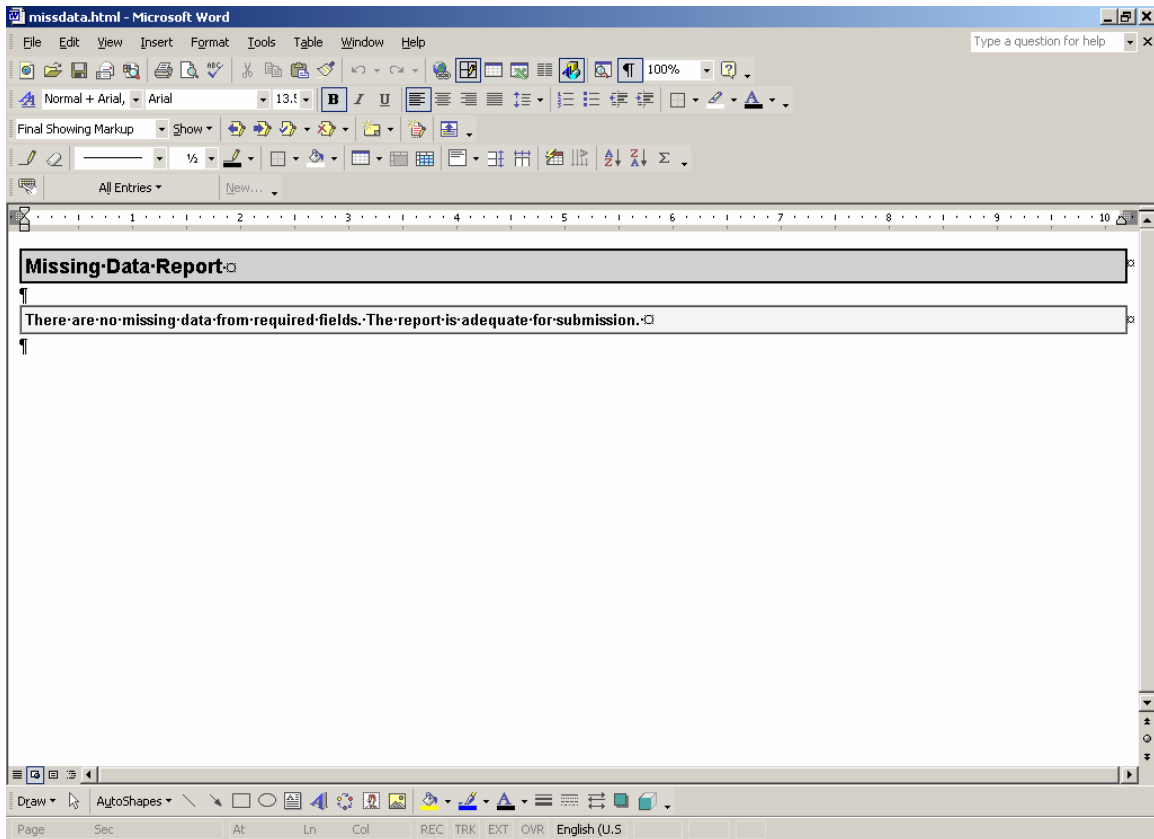
⇒ Once you have found the executable file, click **Select**. You return to the **Report Output Dialog** box with your selection showing. An example is shown in *Figure 48*.



**Figure 48: Report Outlook Dialog with Word selected**

- Select the desired shading of the report:  
Click the option button for **Grayscale** or **Color**.
- Select the desired font size:  
Click the option button for **Small Font** or **Large Font** (which is approximately 10 pt).
- When you are finished making selections, click **OK**.

The eSubmitter software generates the report in HTML, which opens for viewing in the application that you selected. The missing data output report will either state that there is no data missing (see *Figure 49*), or identify the missing data that must be entered before the files are packaged for submission.



**Figure 49: Example of Using Word for Viewing a Missing Data Report**

3. After you have verified that no data is missing from the application, you are ready to package your files for submission.

## **5.6.2 Packaging Submission Files**

After completing the submission and verifying there is no information missing, you are ready to package the files for submission. To proceed, you should have the eSubmitter application open, and the finished submission displayed on your computer screen.

### **To package the files for submission:**

1. From the menu bar, click **Output > Package Files for Submission**. (See also page 21.)
  - If you have missing data, you see the warning shown in *Figure 50*:

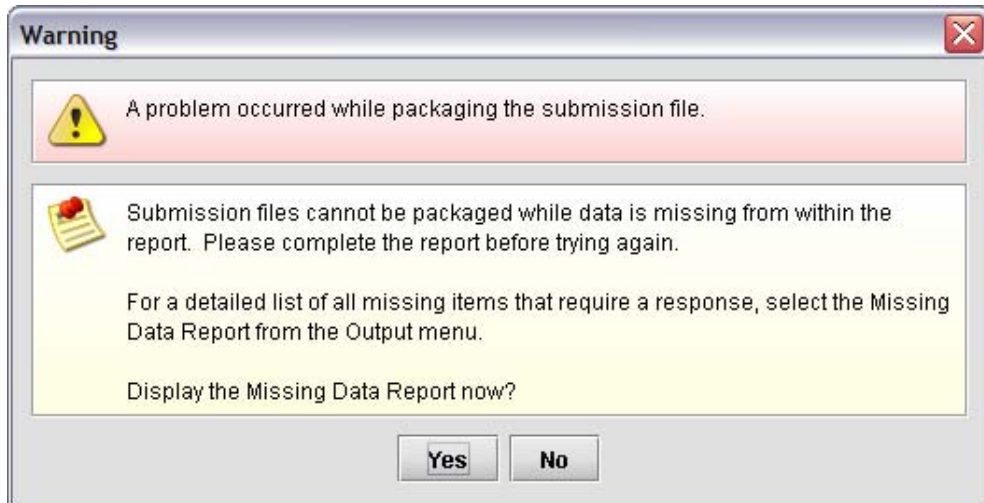


Figure 50: Missing Data Warning

- If the submission has all required data, you see the **Package Files for Submission Dialog** box (an example is shown in *Figure 51*):

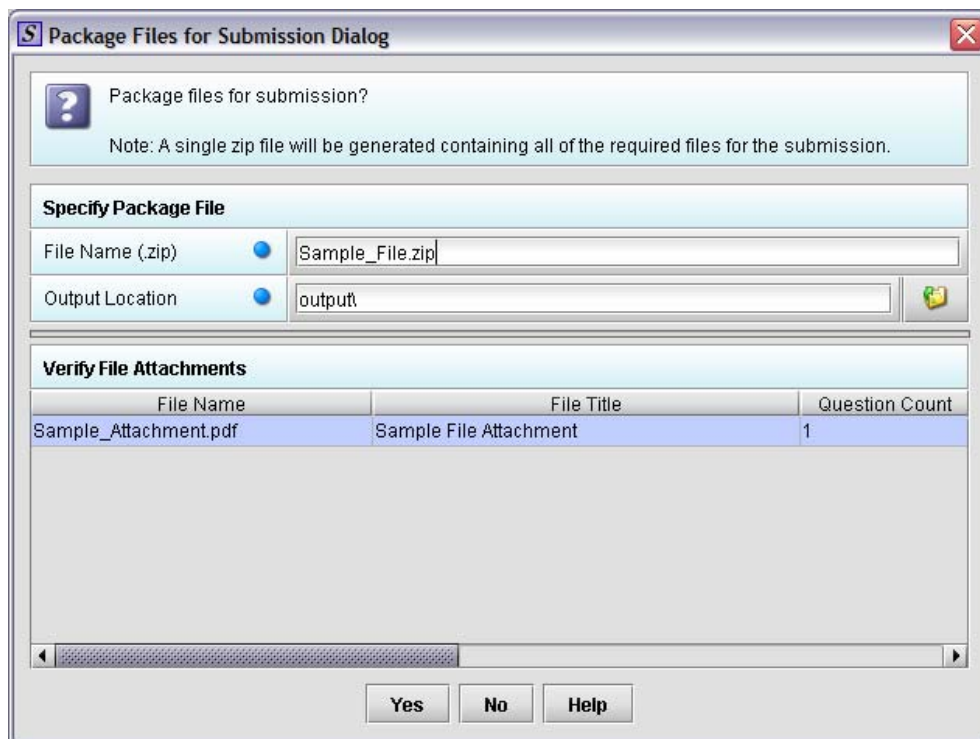


Figure 51: Package Files for Submission Dialog Box

2. On the **Package Files for Submission Dialog** box:
  - The **File Name (.zip)** text box identifies the default zip file name for the application. Note the name for the zip file. eSubmitter automatically uses the name of the application for the zip file. **Do not modify the zip file after it is generated by eSubmitter.**

- 
- 
- The **Output Location** identifies the default file folder where the zip file is located. Note the output location.  
If you did not change the location of the eSubmitter software when you installed it, the output location is *C: Program Files\eSub\output*.
    - ⇒ To change the location click the file folder icon, locate the desired location and click **Select**.
  - **Verify File Attachments** lists all the file attachments used in the application.
    - ⇒ Ensure that all of the appropriate file attachments are listed. Only files referenced in responses will be included. Check the question counts for confirmation.
    - ⇒ Check the file dates, size and locations to ensure the correct versions of the files are provided.
3. Perform one of the following steps after checking the file name, output location and file attachments:
- Click **Yes** to close the dialog box and attempt to package the files for submission. If any problems occur, a dialog box appears to explain the issue. Once completed, an informational dialog box will display the names and locations of the files that were generated.
    - ⇒ Click **Close**. You will return to the open submission.
  - Click **No** to close the dialog box without packaging the files for submission.
  - Click **Help** to display the help window and help text.
4. Locate the files on your computer to send to NICHD. The zip file will be located in the Output folder in the eSubmitter directory.
- If you did not change the location of where your files are stored, then the packaged submission will be located in the following location: **C:\Program Files\NCS\_App\output**
  - Email only the **zip** file to the following email address:  
[NCSADJsubmission@mail.nih.gov](mailto:NCSADJsubmission@mail.nih.gov).
- \*NOTE: Do not modify the zip file after it is generated by eSubmitter.**

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## 6. GETTING SUPPORT

Please direct technical questions or comments to the Technical Support Team at: [NCSADJtechteam@mail.nih.gov](mailto:NCSADJtechteam@mail.nih.gov) or call 301-402-1978 during the business hours of 9:00 a.m.– 4:00 p.m. ET, Monday – Friday.

Questions regarding the Adjunct Studies Program (other than technical support) should be directed to [NCSAdjunctStudies@mail.nih.gov](mailto:NCSAdjunctStudies@mail.nih.gov).

Please be sure to include your name, affiliation, and contact information in all correspondence.

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