

Sample document

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Chapter 1. Installation

Installation Procedure - User Manager

User Manager (UM) is a management system that can be used in various setups for ETO 1.0.

Ensure that **Constructor** has been installed already on this machine.



Note:

ETO requires that the Windows Text Size be set to 100%. As of Windows 11, the default Text Size is now set to 125%. You must go to **Control Panel > All Control Panel Items > Display** and set the Text Size to 100% to use ETO, including the installers.

1. Note that **User Manager** is normally installed on one or more of the **Builder** user machines. Only one instance of User Manager is necessary to manage the ETO Users for a given site.
2. Double-click the **User Manager** Installer. You will see a window which will allow you to choose the **Language** using the dropdown.
3. Once you click **OK**, you are prompted to choose an install folder.
4. Accept the default install directory, or select the desired directory for ETO User Manager (**note, this should match the Constructor Installation directory**), then click **Next** . If this directory already exists, you will be asked if you wish to install to the existing folder. You should choose **Yes**.
5. Accept the default or choose a different **Start Menu folder** and click **Next**
6. Review the Installer settings, then click **Install**.
7. Click **Finish**. ETO is now installed on your machine.

Chapter 2. Configuration

SolidWorks Integration Configuration in ETO

These are the settings that configure the SWX Integration in ETO, available in ETO 1.0 and above. There is a description of what they do, the recommended setting for most users, along with how to “tune” them, if it applies.

These settings can be configured via the **Options** Dialog, on the **Additional Settings** tab, or in the ETO.ini file.



Note:

The ETO.ini file is found in:

C:\ProgramData\ETO\yourCurrentETOVersionNumber

(for example) C:\ProgramData\ETO\10.2.0

These settings are all per-profile in the ETO.ini file - the start of each profile's entries in the ETO.ini file is designated by:

```
[Profile~Development_440_Local]
RebuildCount=15
RefreshTime=15
RefreshSWX=2
SwxReparent=2
RemoteSWXRelease=2
RemoteSWXTime=2
```

Please contact our support team, if you have any questions regarding these settings.

Chapter 3. ADHOC

Handling incomplete enrollment applications

If an enrollment application is incomplete and you need to prevent it from going to CMS, follow the steps given below.

1. Check the **Incomplete Application** checkbox. This can be done at any time before the transaction appears on a CMS Transfer File and that file is marked as **Sent**.
2. Checking this box does two things:
 - Stops the transaction from going on the CMS transfer file.
 - Queues the member for a letter requesting the missing information.



Note:

This only applies to transaction types **60** and **61**.

3. Once you check the **Incomplete Application** box, two new fields appear on the **Transactions** screen.

Field	Values
Reason	<ul style="list-style-type: none">◦ Part A/B◦ Legal Authorization◦ Part A/B and Legal◦ Part A/B and Other◦ Legal and Other
Other	Type the other reason in the textbox if you select any of the values above which includes Other .

4. Selecting these values will check the appropriate boxes on the letter, and the other text will appear in the line next to **Other**.
5. Once you are done selecting/entering the reason, click **Save**.



Note:

You will be prompted to confirm the incomplete status and warned that the transaction will not go to CMS.

6. If/when you receive the missing information from the member, pull up the transaction, deselect **Incomplete Application** and **Save**. The transaction will then go to CMS.