A.   Getting Started

1. **I will open the Material Types menu under Setup to show you a typical screen.**

Note: Select the Materials Types menu under Setup

2. **Notice that the program displays four panels; Top Panel, Menu Panel, Records Panel and Search Panel. I'll brief you on all four. The top panel displays which user is logged in on this computer, and the current user's role. There are selectable buttons which will let you; go to the Home page, Clear Control Preferences, Change Password, and Exit. The Exit button logs you out of the program, which returns you to your Login screen.**

3. **When you first start using the program you will navigate the Menu in a top down order. Select a plus button (+) adjacent to a folder to display Submenus. Select a Submenu to display a summary list of existing records in the Records Panel. Select the minus button (-) adjacent to a folder to collapse the Submenus and simplify navigation.**

4. **The Search Panel performs searches and filtering of your records.**

5. **We will prepare the system by filling the data in the Setup menus so this information appears in drop downs later in the system. All this information is preliminary to entering materials and managing your inventory.**

6. **Before we get into details, I'd like to show you several features that are used throughout the program.**

7. **I selected a Submenu to display a list of existing records. The grey and white stripes are just to make viewing easier. You may select a panel's double arrow button to collapse and expand a panel.**

Demonstrate: Collapse and expand each of the panels.

8. **Hover your mouse over any icon in the program to display a tool tip. Select the blue hyperlink to see the details of an existing record. Click the Update icon to edit a record. Click the hyperlink to see the Read Only display where an Update button will get you to the edit screen. The Add New Record button will open an edit screen where you can enter new data. The update icon will display the same edit screen where you can make changes to the existing record. The changes allowed are limited to the data fields displayed.**

Demonstrate: Open a record through the Update icon and the Update button on the Read Only page.

9. Once you confirm an entry it becomes a permanent record that cannot be deleted. This is required by the FDA and Part 11 for electronic records. That's why we use the word "Training" in our practice so it is clear to anyone including an FDA inspector that this data is not meant to be used for real products. With that in mind, be sure to check your spelling! Fields marked with an asterisk are required.

10. Select the Confirm icon to capture and save any changes you have made and to return to the list of records. Alternatively, you can Close to return to the list of records without saving your changes.

11. You may scroll through a list. When the list gets long you can use the pagination buttons to navigate to first page, previous page, next page and last page. You may also enter a page number to jump to. You can designate the number of records that will appear on each page.

12. Let's begin some hands on training! I'll guide you as you perform data entry.