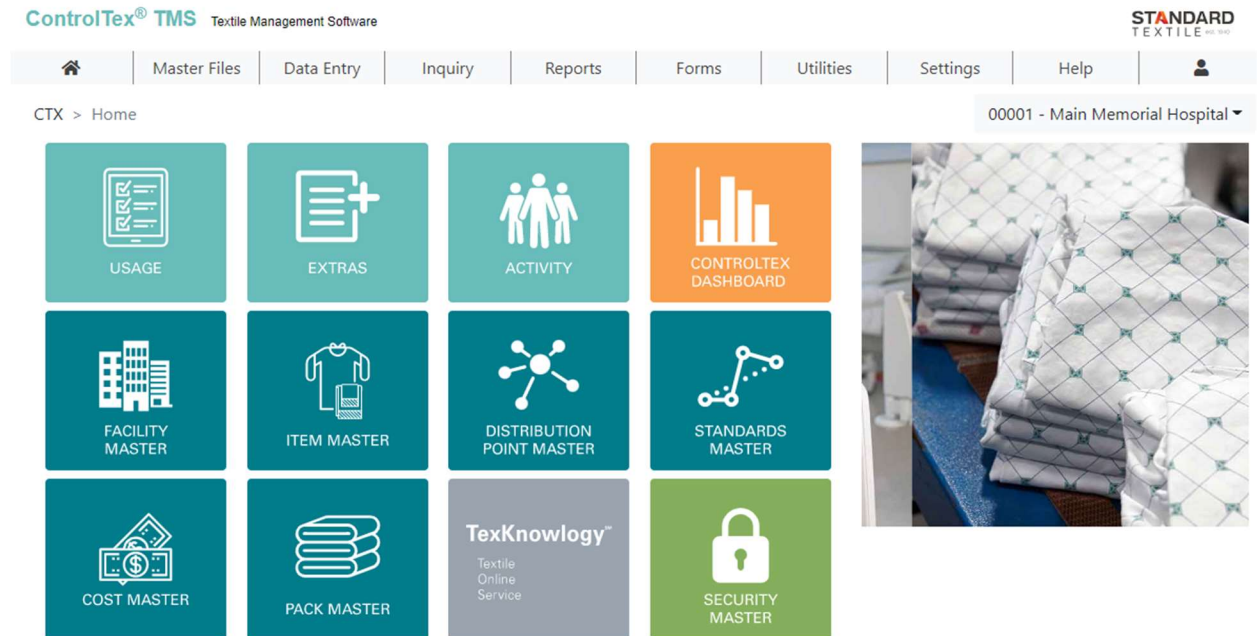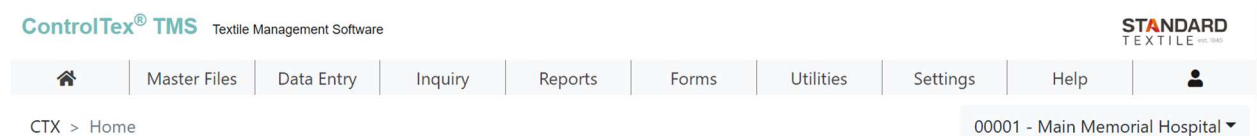# CONTROLTEX® NEXT GENERATION
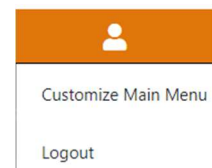# HOME SCREEN TRAINING GUIDE

This training guide describes the key components and functions of the Next Generation ControlTex Home Screen. The Home Screen is the first screen each user sees after logging into ControlTex. The Home Screen is the "hub" or central location to access all the available functions and screens in your ControlTex system.

Menu Bar

1. The Menu Bar provides access to all the primary functions and screens within your ControlTex system. Hovering over or selecting a menu category will display the functions for the category. The menu bar is displayed at the top of all the screens throughout your ControlTex system.

2. The Menu Bar includes a Home Icon.   Selecting the Home icon from any screen will return the user to the Home Screen.

3. The Menu Bar provides a User Icon at the end of the menu bar. To log-out of ControlTex, hover over the User Icon and then select Logout.
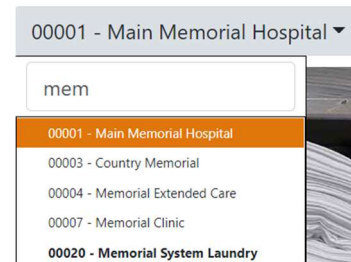
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4. The User Icon also provides access to customize the shortcut tiles displayed on the Home Screen as described in the Shortcut Tiles section of this training guide.

5. The Menu Bar Breadcrumbs show where you are within the software program.
   a. Breadcrumbs display the screen you are on and the path from CTX Home to your current screen. Selecting Home will quickly return the user to the Home Screen. The following is an example of the breadcrumbs when a user is on the Facility Master Grid Screen.

   CTX > Home > Master Files > System > Facilities > Facility Master

   b. Facility – Your current Facility is displayed with the Menu Bar on every screen. Users with Access to more than one Facility can quickly change to different Facilities from any screen in ControlTex by clicking on the down arrow next the facility displayed name. Clicking this arrow will illustrate a list of facilities available for the user. A search box at the top of this list allows the user to type in a number or name. The list will narrow to the available facilities containing the letters or numbers typed into the search box. Changing Facilities will keep the user on whichever main functional screen they are currently on. For example, if a user is in the data entry screen and changes the facility, they will now be in the data entry screen for the newly selected facility.

SHORTCUT TILES

6. Shortcut tiles are available to display on the Home Screen based on each user's system access setup in the Security Master. Shortcut tiles provide quick and easy access to the most frequently used Data Entry Screens, to each of the Master Files, to the ControlTex Dashboards and to the TexKnowlogy® website screens.

   a. The ControlTex Dashboards and the TexKnowlogy website screens are not accessible from the menu bar and can only be accessed using their shortcut tiles.

7. The shortcut tiles available for each user can be moved around on the Home Screen by each user. Tiles less frequently used may also be hidden to provide each user with the most effective Home Screen layout.

8. To move tiles or hide tiles, the user must select Customize Main Menu from the User Icon drop-down list.

   a. The first time you customize your Home Screen, a list of all your available Tiles will be displayed in a list on the left-hand side of your screen. The list

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will be sorted alphabetically based on the tile names. You may want to sort the list based on category to easily identify the tiles based on their primary function category. To add a tile to your Home Screen, click on the pin for the tile you want displayed.

b. To hide a shortcut tile, click on the trash can located in the upper right-hand corner above the tile

c. To move a shortcut tile, select the crossed arrows and drag the tile to the desired location. The remaining tiles will move to make room for the tile. Keep moving tiles around until you have the order or look desired.

9. Once you have completed the changes to customize the shortcut Tiles displayed, click on the Home icon to return to your newly customized Home Screen.

10. You may return to the Customize Main Menu at any time to make changes to which tiles are displayed and the order in which they are displayed. If you return to customize your home screen after the first time, your tile selections will be displayed based on your last customization.

ROTATING PICTURES AND INFORMATION LINKS

11. The Home Screen displays pictures and information links on the right-hand side of the screen. Training Guides and new information about ControlTex updates may be displayed in this section of the Home Screen.

If you have additional questions regarding the new features of your ControlTex Home Screen, please contact your ControlTex Representative or call the ControlTex Helpdesk at 1-800-609-3688.

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