

Console for Windows

Guide

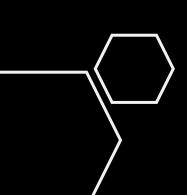
firelight.

CONSOLE FOR WINDOWS GUIDE

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Hexure

Two South Cascade Avenue Colorado Springs, CO 80903 Phone: 719.442.6400

Phone: /19.442.6400

Internet E-Mail: info@hexure.com

Website: hexure.com



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FireLight Console

Overview

The FireLight Console for Windows (Console) is a streamlined desktop FireLight® program that resides on your personal device (tablet, laptop). With the Console installed, you can download (check out) applications from the FireLight web server platform (FireLight) to the Console while connected to the Internet and then work on the applications while disconnected from the Internet. When connected to the Internet, you can upload (check in) the updated applications from the Console to the FireLight web server, where the applications are stored.

Important! FireLight Console now supports check out of applications with wizards, by bypassing the wizards in the package, and allowing the forms to be checked out through the Console. Wizard Only Applications will NOT be able to be checked out and will produce an error if selected to check out to the Console.

Following are some considerations when using the Console:

- The FireLight web server stores the applications that you check out and access by the Console for working offline. Install the FireLight Console from the My Preferences page in the FireLight web platform. In FireLight My Preferences, you can also wipe data (all application changes) and uninstall the Console.
- An application can be active in either FireLight or the Console—not both. When you
 check out an application from FireLight to the Console, FireLight locks the application
 and you cannot edit it in FireLight.
- You can check out applications to the Console for a limited length of time. If the Console check out time expires and you have not checked in the applications to FireLight, FireLight discards changes you made to the applications from the Console.
- Non-application activities are not available on the Console.
- The Console supports localization of the User Interface. See Locale in Console Settings.



System Requirements

Following are the recommended minimum system requirements for the FireLight Console.

FireLight Console Recommended Minimum Configuration

Requirement Type	Item Name	Quantity/Type/Specifics	
Hardware	Processor	1.5 GHz or faster	
	Memory (RAM)	2 GB or greater	
	Hard Drive Free Space	300 MB	
	Screen Resolution	1024 x 768 or higher	
Software	Operating System	Windows 7 Home Premium	
	Microsoft .NET Framework (installed)	Version 4.5	
	High Speed Internet Connection	2.0 Mbit/s or greater	

Supported Operating Systems

Supported Operating Systems

Operating System*	Supported Editions	Additional Information
Windows 10	32-bit and 64-bit	Includes the .NET Framework 4.6 (you do not have to install it separately)
Windows 8.1	32-bit and 64-bit	Includes the .NET Framework 4.5.1 (you do not have to install it separately)
Windows 8	32-bit and 64-bit	Includes the .NET Framework 4.5 1 (you do not have to install it separately)
Windows 7 SP1	32-bit and 64-bit	
Windows Vista SP2	32-bit and 64-bit	

^{*}Recommend upgrading to the latest Windows Service Pack and critical updates available.



Password Requirements

- The Console prevents the re-use of any passwords created in the past (3 times Password Expiration) days. For example, if the Console is set to expire a password in 60 days, you cannot use any passwords created in the last 180 days.
- Each FireLight client organization configures their password requirements for the Console. The login page contains the specific requirements.

NOTE: Your organization may also require a login Username entry.

Install the Console

You download the Console program from FireLight web to your device (tablet, laptop, etc.). A user-defined Password is required to log on to the Console. Refer to the "My Preferences" section in the *FireLight Platform User Guide* for more information.

- 1. Connect to the Internet.
- 2. Log on to FireLight.
- 3. On the Home page navigation bar, click **Preferences**.
- 4. Under **Mobile Access**, click the **Add New Device** button.
- 5. Under **New Device**, do the following:
 - a. Click the **Send PIN** button, enter your **Name** and **Email** in the dialog box and click **OK**.
 - b. Click the **Windows Install** button to begin the Console installation.
- 6. In the notification bar at the bottom of the FireLight page, click Run.
- 7. If applicable, on the Security Warning dialog box, click the **Install** button.
- 8. Enter the **Access PIN** (sent to your email in step 5a) and a **Device Name** and click **Continue**.
- 9. Log in to the Console:
 - a. If your organization requires a username, enter your designated username in the **Username** text box.
 - b. Enter a Password in the **Password** text box, re-enter the Password in the **Re- Enter Password** text box, and click the **Login** button. Remember this Password for future logins to the Console. (See "Password Requirements" above.)

The Console starts and displays your active applications on the My Applications window.

Typical Console Work Flow

1. Log on to the Internet.



- 2. Log on to the Console using the Password that was set during the Console installation.
- 3. Select and check out applications from the FireLight web server to the Console.
- 4. Update the applications on the Console, which does not require an Internet connection.
- 5. Log on to the Internet.
- 6. Before application updates expire on the Console, check in the updated applications on the Console to the FireLight web server.

Start and Log On to the Console

After the initial installation startup, do the following to start and log on to the Console.

1. On the Windows **Start** menu, go to **Insurance Technologies** and click **FireLight Console.x.x.xxx** (version number) to start the Console.

TIP: For a more simplified future startup, right-click the Console icon on the taskbar along the bottom of the screen and click **Pin this program to taskbar**. Click the icon to start the Console in future sessions. You need to re-pin the Console to the taskbar whenever the Console updates to a newer version.



2. Enter the Password that you set up when you installed the Console and click **Login**. **NOTE:** If you have multiple device profiles, select a device profile and then enter the Password (see page 33).





If your organization requires a Username, enter a **Username** and **Password** in the text boxes.



When you initiate a Reset Password from the FireLight web program, a Password Reset message appears.

a. Click the **OK** button.

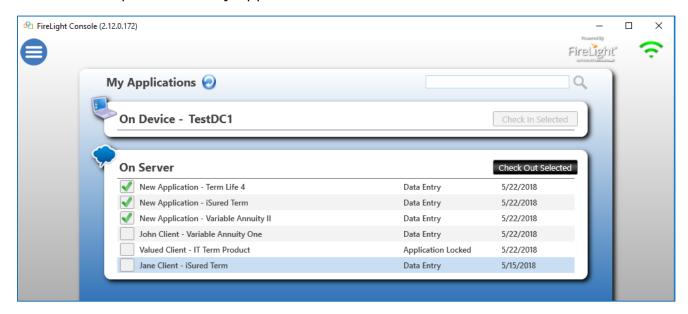


 Enter the new password in the **Password** text box, re-enter the password in the **Re-Enter Password** text box and click the **Login** button. (See "Password Requirements" on page 7.)





The Console opens to the My Applications home window.



Internet Connection Icon

Connect to the Internet to check out and check in applications to the FireLight web server.

The icon on the upper right of the Console turns green when successfully logged on to the Internet and synchronized to the FireLight web server. Point to the icon to display the online message.

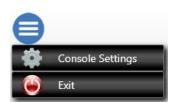


Action Menus

Click the menu button on the upper left of the Console screen to access commands for the current window. The menu commands are different for each window depending on the application status. Use the menus to view and change Console settings and to navigate and exit the Console. The Home command navigates to the My Applications window.

The following examples display available menu commands for the My Applications (Home) window and for applications in Data Entry status and Pending Review status.









My Applications – Home

Application in Data Entry

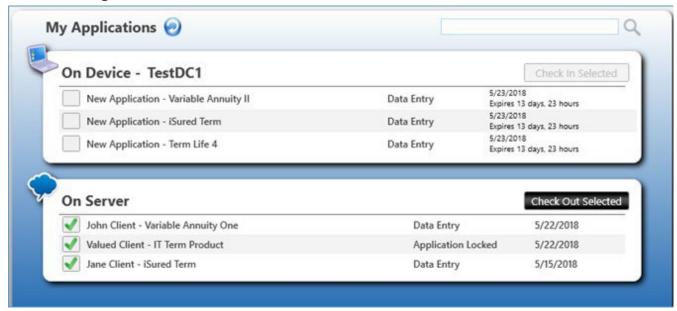
Application in Pending Review



My Applications

Upon successful logon, the Console opens to the My Applications home window. Use the grids in the My Applications window to do the following while connected (online) or disconnected (offline) from the Internet:

- While connected to the Internet (online), select applications in the **On Server** grid to check out from the FireLight web server to the Console for working offline.
- Use the **On Device** grid to open applications on the Console (offline or online), undo check out for applications on the Console (online), or check in applications to the FireLight web server (online).



At the top of the My Applications window, click the **Reload List** button to refresh (update) the On Server and On Device grids after checking in applications to FireLight or checking out applications from FireLight.



On Server

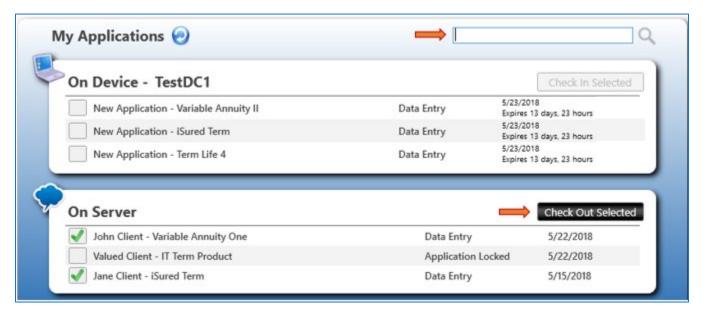
The On Server grid on the My Applications window contains a list of your active illustrations that are on the FireLight web server.

Check Out Applications from the FireLight Web Server

- 1. Log on to the Internet to synchronize with the FireLight web server.
- 2. In the **On Server** grid, select the check box for each application name to check out. A green check mark appears in the check box of the applications that you selected for check out.

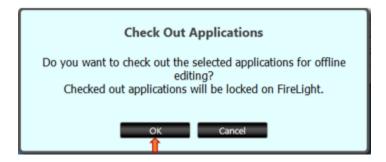


TIP: Use the search box on the upper right of the My Applications window to enter text and click the button to search for application names that contain the search text. Clear the search text to display the full list of your active applications.



- Click the Check Out Selected button.
- 4. Click the **OK** button on the **Check Out Applications** dialog box to check out the files from the FireLight web server to the Console. Or, click **Cancel** to cancel the check out and close the dialog box.





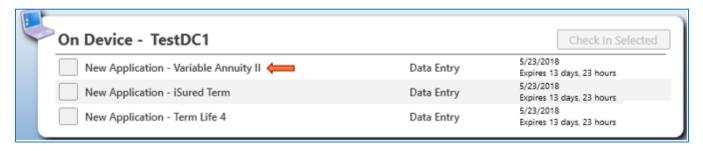
On Device

The On Device grid on the My Applications window contains a list of your active illustrations in FireLight that you checked out to the Console. You do not need to connect to the Internet to open files in this grid.

IMPORTANT! The length of time before the application expires on the Console is on the right of each application row in the grid. Be sure to check in your updates before the application expires, or your changes will be lost.

Open an Application on the Console

In the **On Device** grid, click an application name to open the application.

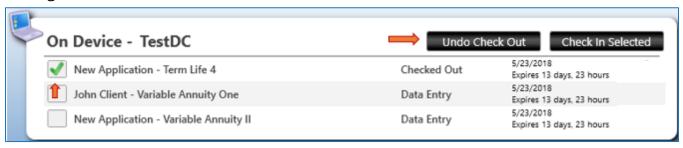




Undo Check-Out for Applications on the Console

IMPORTANT! When you undo check out for an application, all changes made to the application from the Console are lost. To enable the Undo Checkout feature, see page 36.

- Log on to the Internet to synchronize with the FireLight web server. The
 icon on
 the upper right of the Console turns green when you successfully log on to the
 Internet.
- 2. On the left of the grid row in the **On Device** grid, select the check box for the application. A green check mark appears in the check box to indicate you selected the application.
- 3. Click the **Undo Check Out** button (if Allow Undo Checkout is enabled in Console Settings).



4. Click **OK** on the Undo Check-Out dialog box to undo the application check out from the FireLight web server.

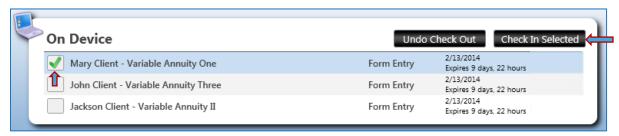




Check in Applications to the FireLight Web Server

When you finish updating an application, check in the application to the FireLight web server before expiration. If the application expires on the Console, all changes made on the Console are lost.

- 1. Log on to the Internet to synchronize with the FireLight web server. The icon on the upper right of the Console turns green when you successfully logged on to the Internet.
- 2. Select the check box next to an application name in the **On Device** grid. A green check mark appears in the check box to indicate the selected application.
- 3. Click **Check In Selected** to check in the selected application to the FireLight web server.



4. Click **OK** on the Check-In Success dialog box.





Update Applications on the Console

Update applications with the FireLight Console in a similar manner as with the FireLight web program.

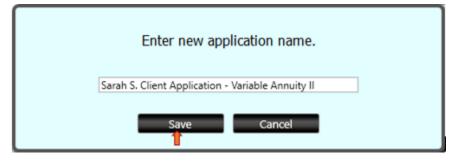
- 1. On the My Applications window under **On Device**, click the application name to open the application.
- 2. Work through the application form pages using the right arrow and left arrow on the form pages to go to the next and previous pages.
- 3. Click the **Continue** button to capture required signatures for the application.
- 4. When finished updating the application, you can log on to the Internet and check in the application using the **Check In Application** menu command or you can check in the application from the My Applications window.

Change an Application Name

- 1. On the My Applications window under **On Device**, click the application name to open the application.
- 2. At the top of the DATA ENTRY window, click 🔎 on the right of the application name.



3. In the Change Application Name dialog box, enter the new name of the application and click the **Save** button.



The new application name displays at the top of the application.

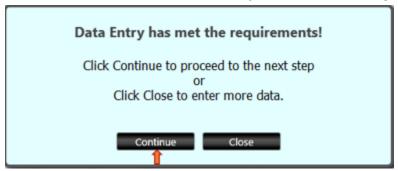




Sign an Application

The application is ready for signing when you enter enough information in the Data Entry phase. The following dialog box appears when you complete Data Entry requirements.

1. Click Continue on the Data Entry has met the requirements dialog box.

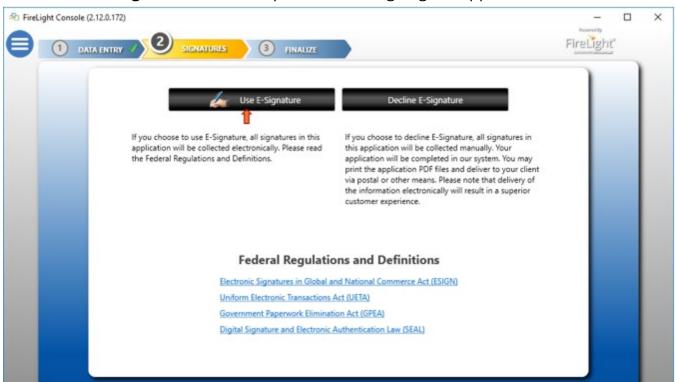


Click **Close** to return to the application pages and enter more information. When ready to go to the signature process, click the menu button and click **Signatures** to begin capturing electronic signatures.





2. Click the **Use E-Signature** button to proceed with signing the application.

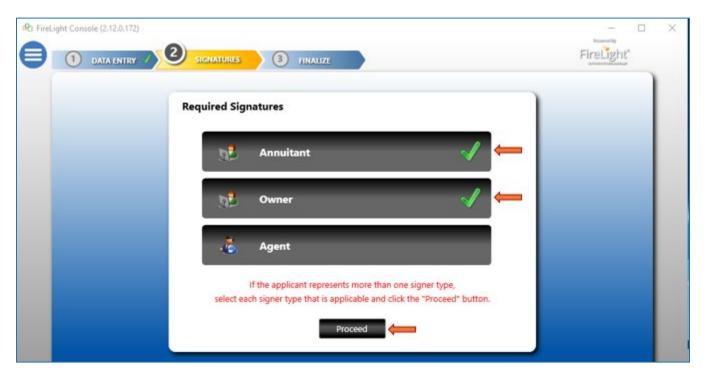


3. Click the button for the first signer.

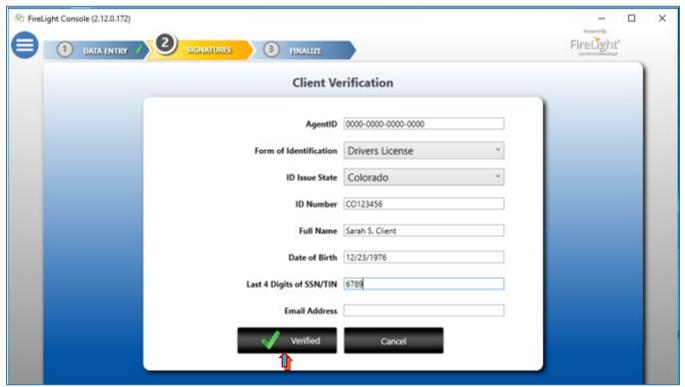




If a single signer can sign for multiple signature roles (for example, when the Owner is also the Annuitant), click each signature role that is applicable for the signer and then click the **Proceed** button.

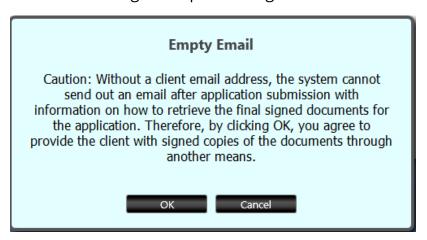


4. Enter your Agent ID and client identification information and click the **Verified** button.

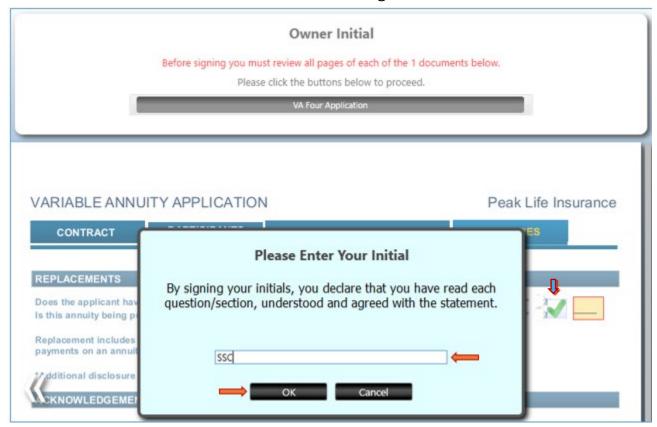




If the Email Address is empty, the following dialog box appears. Click **Cancel** to return to the Client Verification page and enter an Email Address. Click **OK** to agree to provide the client with signed copies through another means.

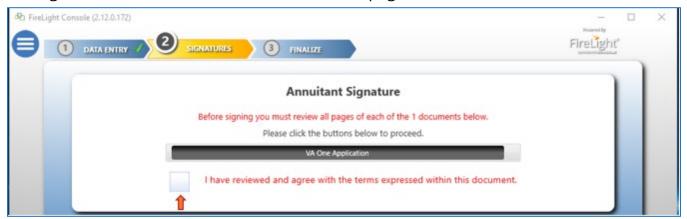


- 5. The signer reviews all the application pages.
- 6. Optional: If signer initials are required, the signer clicks the initials check box, types their initials in the **Please Enter Your Initial** dialog box and clicks the **OK** button.

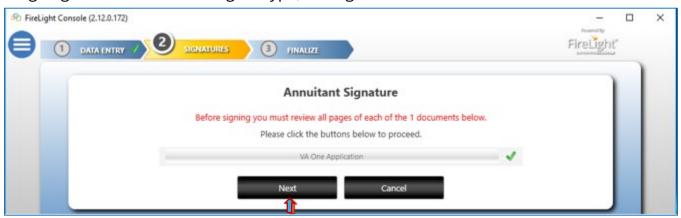




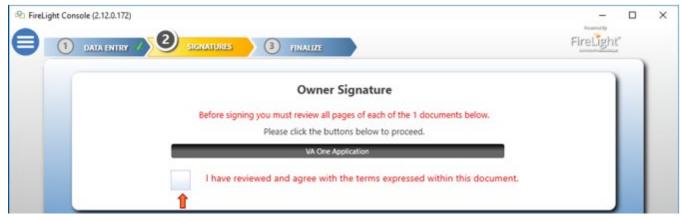
7. The signer selects the check box above the form page.



8. If signing for more than one signer type, the signer clicks the **Next** button.

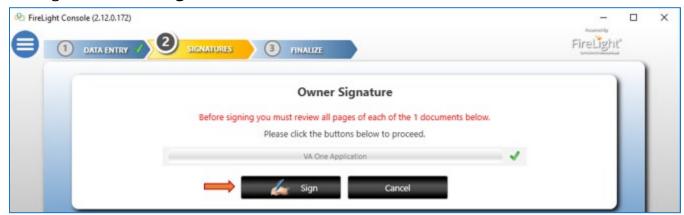


The signer selects the check box above the form page for the next signer type.





9. The signer clicks the **Sign** button.



- 10. The signer enters their Full Name and City and other information as applicable.
 - If enabled for your organization, the signer can select a Font Style.
 - If your organization allows the text script generated on the signature pad in FireLight, click the **I Consent** button.



• If your organization requires a signature on a signature pad, the **I Consent** button does not acknowledge the text script.



• Sign using a touch screen or the built-in signature pad as shown below and click the **I Consent** button.



• Sign the application using a Topaz external signature pad as shown below and click the **I Consent** button.







11. Work through the same steps for each signer. When signatures are complete, click the **OK** button on the following dialog box.



12. The application is now complete and ready to check in to the FireLight web server. See Check in an Application.

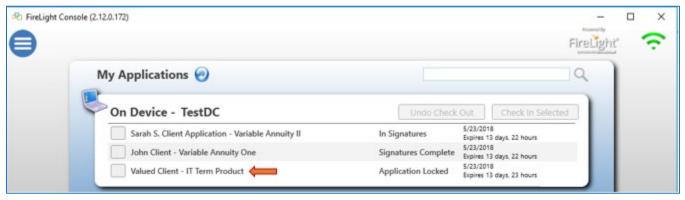


Unlock an Application

CAUTION: Unlocking the application will revoke all previously captured signatures and reviews for the application.

Use the **Unlock Application** command on the menu to unlock and allow revisions to the application.

1. If the application is not open, on the My Applications window under **On Device**, click the application name.



The application opens.

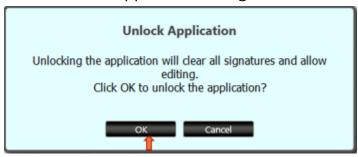


2. On the upper left of the Console, click the menu button and click **Unlock Application**.





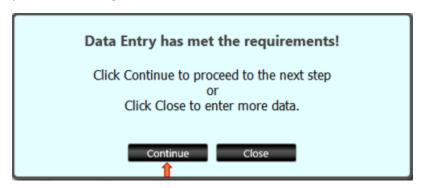
3. On the Unlock Application dialog box, click the **OK** button.



FireLight revokes all previously captured signatures and returns the application to the Data Entry phase.



- 4. If Data Entry has met the requirements, the following dialog box appears. Click the **Continue** button to proceed to Signatures.
 - Click the **Close** button to close the dialog box and remain in Data Entry. When finished with Data Entry, click the menu button and click **Signatures** on the menu to proceed to Signatures.



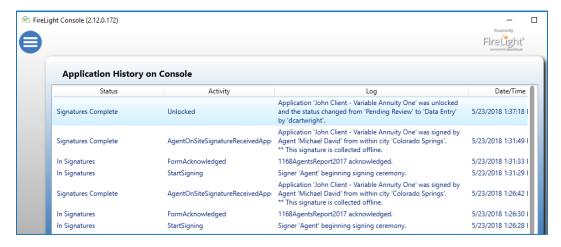
View Application History

View application changes made with the Console.

- 1. On the My Applications window under **On Device**, click the application name to open the application.
- 2. On the upper left of the Console, click the menu button and click **Application History**.



The Application History on Console window displays the application history.



3. On the upper left, click the menu button and click **Back to Application** to return to the application. Click **Home** to close the application and return to the My Applications window.

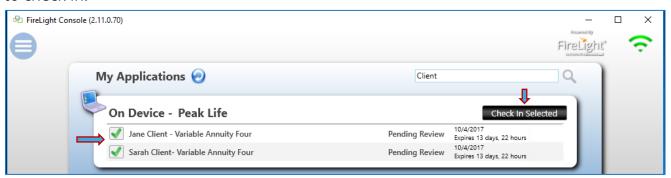




Check In Applications

When finished updating the application forms, you can log on to the Internet and check in the application using a menu command as follows.

- 1. Log on to the Internet.
- 2. Ensure the synchronize icon is green on the upper right of the Console.
- 3. In the **On Device** section of My Applications, select the check box for each application to check in.



- 4. On the right of the On Device section, click Check in Selected.
- 5. Click **OK** on the Check-In Success dialog box to close the dialog box and return to the My Applications window.





Console Settings

Use the Console Settings window to view device information and manage the Console settings.

View Device Information

- 1. Click the menu button on the upper left of the Console screen and click **Console Settings** to view the device name, date, and time of the last heartbeat check with the FireLight web server, and the Password expiration date and time for the Console.
- 2. Click **Close** to return to the My Applications window.





Enable and Add Multiple Device Profiles (Optional)

If you are an agent who sells for multiple carriers, you can segregate your applications in the Console by carrier by using multiple device profiles (one for each carrier). First, add a new device using the FireLight web program and then activate the new device profile using the Console. Add a device profile for each FireLight logon as needed. Do the following to add additional device profiles.

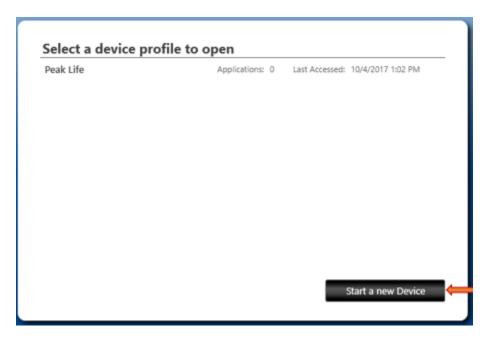
FireLight Web:

- 1. Log on to the carrier's FireLight web program.
- 2. On the right of the Home page or on the top navigation bar, click **My Preferences**.
- 3. In the Mobile Access section, click Add New Device to get an Access PIN.
- 4. Click **Send PIN**, enter a **Name**, enter your **Email** address, and click the **OK** button to send the Access PIN for the new device to your email address.

FireLight Console:

- 5. Start and log on to the Console.
- 6. Click the menu button on the upper left of the Console screen and click **Console Settings**.
- 7. Select the **Enable multiple device profiles** check box to enable multiple device profiles in the Console. (Clear the check box to continue using one device profile.)
- 8. Click the **Close** button to return to the My Applications window.
- 9. Click the menu button on the upper left of the Console screen, and click **Exit**.
- 10. Restart the Console to activate the multiple device profiles feature.
- 11. When you enable this feature, the Console startup screen displays the activated device profiles. Initially, you have only one device profile at the top of the startup screen. Click **Start a new Device**.





12. Enter the **Access PIN** that you received via email, enter the **Device Name**, and click **Continue**.



13. Enter the Password for the new device profile in the upper text box, re-enter the Password in the lower text box and click the **Login** button. (See "Password Requirements" on page 7.)

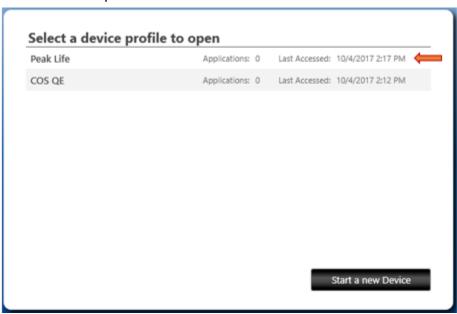




- 14. The Console opens to the My Applications window for the device profile that you just activated.
- 15. Use the FireLight web program and Console to add a device and device profile in the Console for each carrier.

Start the Console and Log On to a Device

- 1. On the Windows **Start** menu, click **All Programs**, click the **Insurance Technologies** folder and click **FireLight Console.x.x.x.xxx** (version number) to start the Console.
- 2. Click a device profile in the list.



3. Enter the login Password for the device profile and click **OK** to log in to the selected device in the Console.





Change Devices

The device profile list is not available after you log into a device. To change devices, exit and restart the Console and then log in with a different device.

- 1. Click the menu button on the upper left of the Console screen, and click **Exit**.
- 2. On the Windows **Start** menu, click the **Insurance Technologies** folder and click **FireLight Console.x.x.x.xxx** (version number) to start the Console. If the Console is pinned to the taskbar, click on the taskbar to start the Console.
- 3. Click a device profile in the list.
- 4. Enter the Password for the device profile and click **Login** to log on to the selected device in the Console.

Deactivate a Device

IMPORTANT! Be sure to connect to the Internet and check in applications from the Console device to the FireLight web server before deactivating the device.

Deactivating a device does the following:

- Performs an undo checkout on the applications in the Console device. Any application updates that remain on the device are lost.
- Removes the device from the device profiles on the Console and deletes device data.

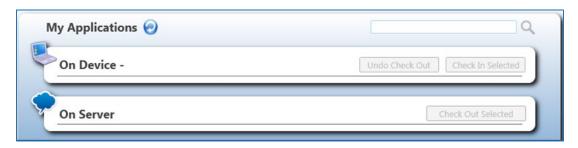
Deactivate a device:

- 1. Start the Console and select a device profile to deactivate.
- 2. Enter the **Password** for the selected device profile and click the **Login** button.
- 3. Click the menu button on the upper left of the Console screen and click **Console Settings**.
- 4. On the Console Settings window, click the **Deactivate Device** button.
- 5. On the Deactivate Device dialog box, click the **OK** button to deactivate the device and remove it from your device profiles. Click **Cancel** if you need to check in updated applications from the device to the FireLight web server before deactivating the device.





Deactivation removes all applications and data from the device profile. It does not uninstall the Console.



6. Click the menu button on the upper left of the Console screen, and click **Exit**.

Disable Multiple Device Profiles

- 1. Deactivate all but one device using the instructions in "Deactivate a Device" on page 34. **CAUTION!** Be sure to retain one device or you will need to add a new device in the FireLight web program to activate and use the Console.
- 2. Click the menu button on the upper left of the Console screen and click **Console Settings**.
- 3. Clear the **Enable multiple device profiles** check box and click the **Close** button.



Allow Undo Checkout

Enable the Allow Undo Checkout feature to activate the Undo Check Out button in My Applications so you can undo the checkout of applications from the FireLight web server. See page 15.

- 1. Click the menu button on the upper left of the Console screen and click **Console Settings**.
- 2. Select the **Allow Undo Checkout** check box and click the **Close** button.

Locale

Console supports localization of the User Interface.

- 1. Click the menu button on the upper left of the Console screen and click **Console Settings**.
- 2. In **Locale**, select a language in the list of available languages. The default is English.
- 3. On the Console Settings window, click Close.

Reset the Login Password

- 1. Click the menu button on the upper left of the Console screen and click **Console Settings**.
- 2. On the Console Settings window, click the **Reset Password** button.
- 3. Enter your current **Old Password** in the top text box.
- 4. In the middle text box, enter your new **Password**. (See "Password Requirements" on page 7.)
- 5. Re-enter your new Password in the bottom text box.





6. Click **Login** to save your new Password and return to the My Applications window. **NOTE:** If you initiate Reset Password from the FireLight web program, see step 2a on

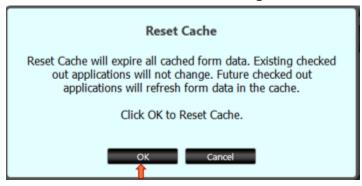
Reset the Cache

page 9 for Console login instructions.

To minimize downloading the same information multiple times, as well as avoid duplicating data for each application, the console caches most of the form data (images, form definitions, etc.). Resetting the Cache essentially expires the form data. The next time you check out an application, everything downloads from the server instead of pulling from the cache on the Console.

NOTE: This does not affect applications that you already checked out to the Console. You should only use this feature when the Form data might be corrupt or incorrect.

- 1. Click the menu button on the upper left of the Console screen and click **Console Settings**.
- 2. On the Console Settings window, click **Reset Cache**.
- 3. Click **OK** on the Reset Cache dialog box.



4. On the Console Settings window, click **Close**.

View Error Logs

- 1. Click the menu button on the upper left of the Console screen and click **Console Settings**.
- 2. On the Console Settings window, click View Error Logs.
- 3. File Explorer opens and displays Console audit logs. Click the **X** on the upper right of the screen to close File Explorer.



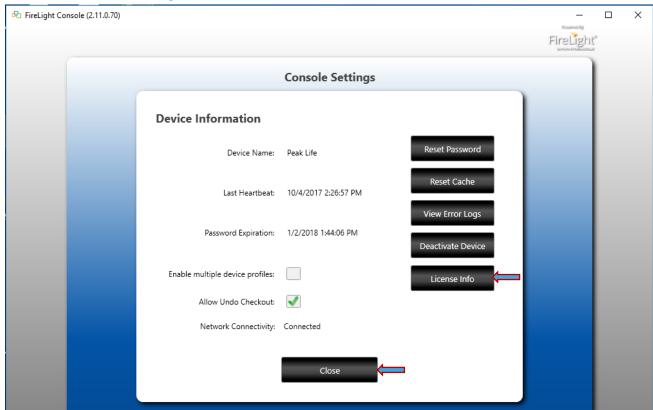
« Data » 37aaecb1-e1c3-4718-b47a-b3ccfc171d94 » ConsoleLogs						
Name	Date modified	Туре	Size			
Audit_Application_201710041710.xml	10/4/2017 11:10 AM	XML Document	3 KB			
Audit_Application_201710041726.xml	10/4/2017 11:26 AM	XML Document	2 KB			
Audit_Application_201710041728.xml	10/4/2017 11:28 AM	XML Document	2 KB			
Audit_Application_201710041739.xml	10/4/2017 12:53 PM	XML Document	18 KB			
Audit_Application_201710041902.xml	10/4/2017 1:02 PM	XML Document	2 KB			
Audit_Application_201710041954.xml	10/4/2017 1:54 PM	XML Document	2 KB			
Audit_Application_201710042018.xml	10/4/2017 2:18 PM	XML Document	2 KB			
Audit_Application_201710042029.xml	10/4/2017 2:44 PM	XML Document	9 KB			
Audit_Business_201710041746.xml	10/4/2017 11:46 AM	XML Document	3 KB			
Timings_Business_201710041710.xml	10/4/2017 11:10 AM	XML Document	2 KB			
Timings_Business_201710041725.xml	10/4/2017 11:25 AM	XML Document	2 KB			
Timings_Business_201710041728.xml	10/4/2017 11:28 AM	XML Document	2 KB			
Timings_Business_201710041737.xml	10/4/2017 12:53 PM	XML Document	9 KB			
Timings_Business_201710041902.xml	10/4/2017 1:02 PM	XML Document	2 KB			
Timings_Business_201710041954.xml	10/4/2017 1:54 PM	XML Document	2 KB			
Timings_Business_201710042017.xml	10/4/2017 2:17 PM	XML Document	2 KB			
Timings_Business_201710042018.xml	10/4/2017 2:18 PM	XML Document	2 KB			
Timings_Business_201710042026.xml	10/4/2017 2:26 PM	XML Document	2 KB			
Trace_Application_201710041747.xml	10/4/2017 12:39 PM	XML Document	81 KB			

4. On the Console Settings window, click **Close** to return to My Applications.



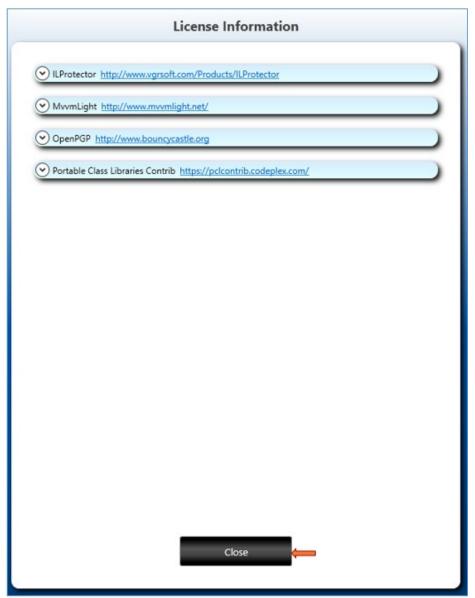
View License Info

- 1. Click the menu button on the upper left of the Console screen and click **Console** Settings.
- 2. On the Console Settings window, click **License Info**.





3. View license information by clicking the applicable button. When finished viewing, click Close.



4. On the Console Settings window, click **Close** to return to My Applications.

Exit the Console

Click the menu button on the upper left of the Console screen and click **Exit**.

