eApp™ for iPad Guide

FireLight

firelight

EAPP™ FOR IPAD GUIDE

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Table of Contents

FireLight eApp™ 5
Overview 5
System Requirements 6
Password Requirements 7
Install FireLight eApp 7
Typical FireLight eApp Work Flow 8
Start and Log On to FireLight eApp 9
Action Menus 12
My Applications 13
On Server 14
Check Out Applications from the FireLight Web Server 14
On Device 16
Open an Application in FireLight eApp 16
Check in Applications to the FireLight Web Server 17
Undo Check-Out for Applications on FireLight eApp 19
Update Applications in FireLight eApp 20
Change an Application Name 23
Sign an Application 24
Unlock an Application 28
View Application History 30
Check In an Application from the Menu 31
FireLight eApp Settings 32
View Device Information 32
Show Undo Checkout 33
License Information 34
Locale 36
Reset PIN 37
Reset Cache 39
Send Error Logs 41
Deactivate Device 43
Exit the FireLight eApp 44
Exit the FireLight eApp 44

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Close and Shut Down the FireLight eApp 45
Use TestFlight to Test the “Beta” eApp for iPad 46

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FireLight eApp™

Overview

FireLight eApp™ is a streamlined desktop FireLight® program that resides on your iPad tablet. With FireLight eApp installed, you can download (check out) applications from the FireLight web server platform (FireLight) to FireLight eApp 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 FireLight eApp to the FireLight web server, where the applications are stored.

Important! FireLight eApp supports iPad only for forms. It does not support iPad for wizards. If wizards and forms are in the package, users can view and modify only the

Following are some considerations when using FireLight eApp:

- The FireLight web server stores the applications that you can check out and access by FireLight eApp for working offline. Install FireLight eApp from the My Preferences page in the FireLight web server program. In FireLight My Preferences, you can also wipe data (all application changes) and then uninstall FireLight eApp from the iPad tablet.
- An application can be active in either FireLight or FireLight eApp —not both. When you check out an application from FireLight to FireLight eApp, the system locks the application in FireLight.
- You can check out applications on FireLight eApp for a limited length of time. If FireLight eApp check out time expires and you have not checked in the applications to FireLight, the system discards changes to the applications you made on FireLight eApp.
- When disconnected from the Internet, FireLight eApp may not support all features. Some products use external web service calls for CRM integration, Custom actions and Can Sell checks that require an Internet connection, so FireLight eApp does not support these features.
- FireLight eApp stores all data securely on the device. The system encrypts the application information and does not back up the data to iTunes, which provides the most security for the data that is collected.

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System Requirements

Following are the recommended minimum system requirements for FireLight eApp.

FireLight eApp Recommended Minimum Configuration

Requirement Type	Item Name	Quantity/Type/Specifics
Devices	iPad Pro 9.7-inch	
	iPad Air 2	
	iPad Mini 4	
Software	Operating System	iPadOS 14
	High Speed Internet Connection	2.0 Mbit/s or greater

FireLight eApp Supported Configurations

Requirement Type	Item Name	Quantity/Type/Specifics
Devices	iPad Pro 12.9-inch (5th generation)	
	iPad Pro 12.9-inch (4th generation)	
	iPad Pro 12.9-inch (3rd generation)	
	iPad Pro 12.9-inch (2nd generation)	
	iPad Pro 12.9-inch (1st generation)	
	iPad Pro 11-inch (3rd generation)	
	iPad Pro 11-inch (2nd generation)	
	iPad Pro 11-inch (1st generation)	
	iPad Pro 10.5-inch	

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	iPad Pro 9.7-inch	
	iPad (8th generation)	
	iPad (7th generation)	
	iPad (6th generation)	
	iPad (5th generation)	
	iPad Air (4rd generation)	
	iPad Air (3rd generation)	
	iPad Air 2	
	iPad Mini (5th generation)	
	iPad Mini 4	
Software	Operating Systems	iPadOS 14
	High Speed Internet Connection	2.0 Mbit/s or greater

Password Requirements

- FireLight eApp prevents the re-use of any passwords created in the past (3 times Password Expiration) days. For example, if FireLight eApp is set to expire a password in 60 days, you cannot use passwords created in the last 180 days.
- Passwords requirements for FireLight e-App are configured by each FireLight client. The login page contains the specific requirements.

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

Install FireLight eApp

You can download FireLight eApp program from the FireLight web to your iPad tablet. A user-defined Password is required to log on to FireLight eApp. Refer to the "Preferences" section in the *FireLight Platform User Guide* for more information.

1. Log on to FireLight web, either on the desktop or on the iPad.
2. On the right of the **Home** page, click or tap the **Preferences** button.
3. Under **Mobile Access**, click or tap the **Add New Device** button to get an Access PIN. Jot down the Access PIN or under **New Device**, click or tap the **Send PIN** button, enter your **Name** and **Email** and click or tap the **OK** button to have the Access PIN sent to your email address.

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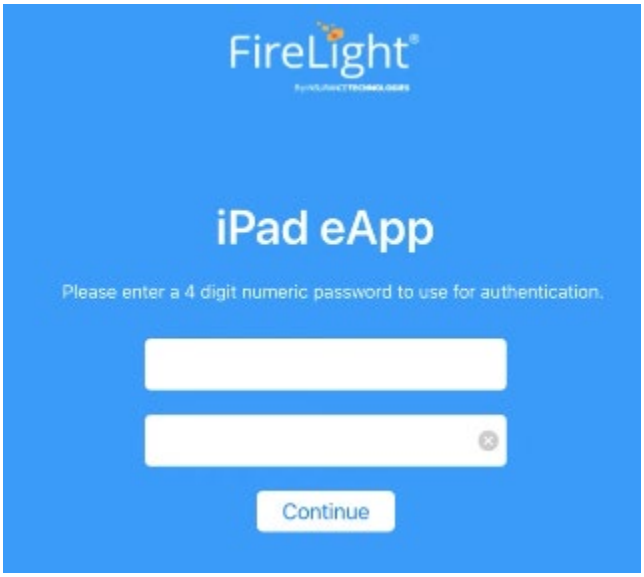
4. If using the iPad for steps 1 through 3, tap the **Download on the App Store** button to go to the FireLight eApp page in the iOS App Store and then install the FireLight eApp from there.

   NOTE: Download on the App Store button is only available in the Production environment. It is not available in the testing environments (UAT/Staging).

   If using the desktop for steps 1 through 3, log on to your iPad, open the web browser and go to https://itunes.apple.com/us/app/id1082132976 to install FireLight eApp.

5. Enter the **Access PIN** (see step 3) and a **Device Name** (e.g., **MDavid2**) and tap **Continue**.



6. Log on to FireLight eApp:
   a. If your organization requires a username, enter your designated username in the **Enter User Name** box.
   b. Enter a password in the **Enter Password** box, re-enter the Password in the **Re-Enter Password** box, and tap **Continue**. Remember this password for future logins to FireLight eApp. (See "Password Requirements" above.)

   FireLight eApp starts and displays your active applications on the My Applications window.

Typical FireLight eApp Work Flow

1. Log on to the Internet.
2. Log on to FireLight eApp using the password that was set during the FireLight eApp installation.
3. Select and check out applications from the FireLight web server to FireLight eApp.

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4. Log off the Internet if needed.
5. Update the applications and capture signatures on FireLight eApp, which does not require an Internet connection.
6. Log on to the Internet.
7. Before application updates expire on FireLight eApp, check in the updated applications on FireLight eApp to the FireLight web server.

Start and Log On to FireLight eApp

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

1. Log on to the Internet.
2. On the iPad, tap the FireLight eApp icon to start FireLight eApp.
3. Enter the Password that you set when you installed FireLight eApp and tap **Continue**.

If your organization requires a username, enter a **Username** and **Password** and tap **Continue**.

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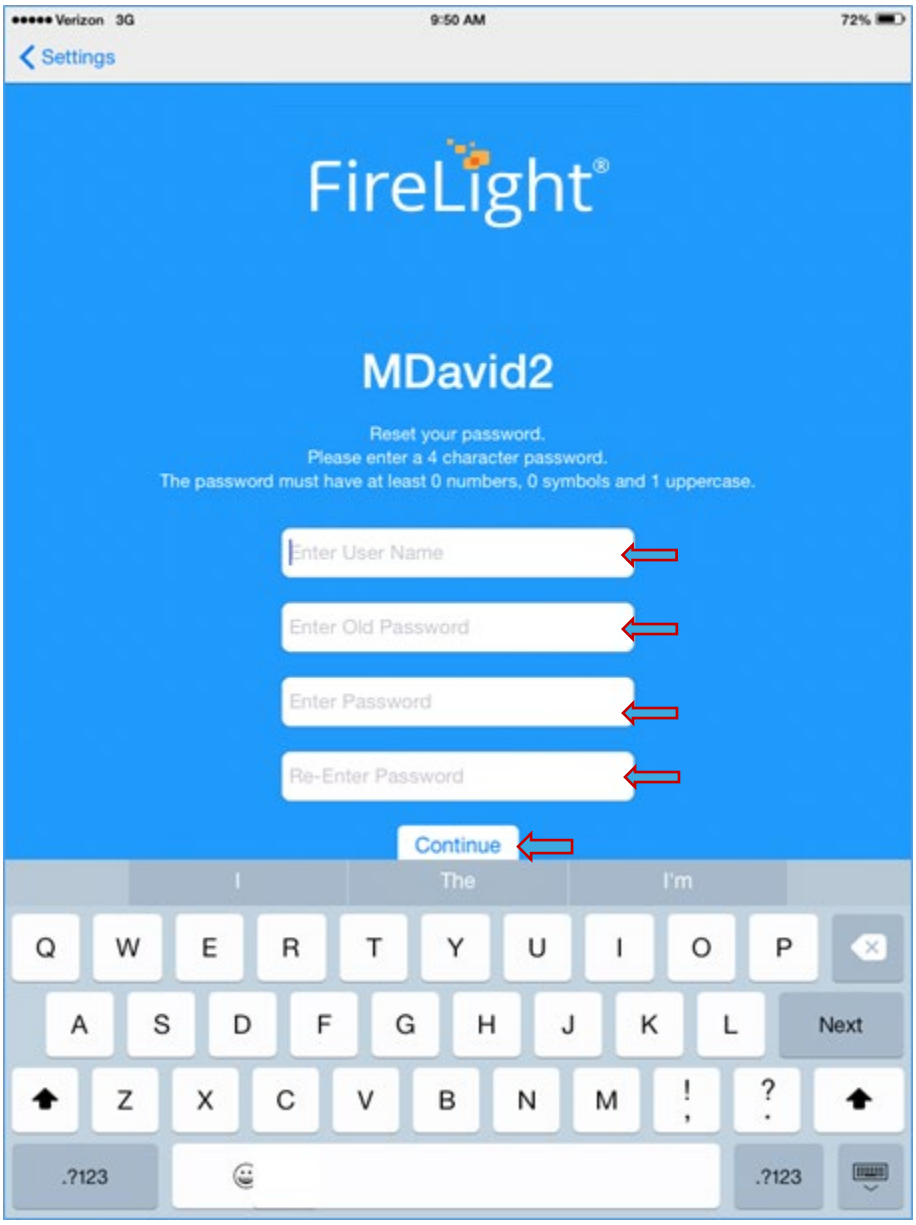
When you initiate a Reset Password from the FireLight web program, a “Reset your password” message appears.



a. If required by your organization, enter your user name in the **Enter User Name** box.

b. Enter your existing password in the **Enter Old Password** box, enter your new password in the **Enter Password** box, re-enter the new password in the **Re-Enter Password** box and tap **Continue**. (See “Password Requirements” on page 7.)

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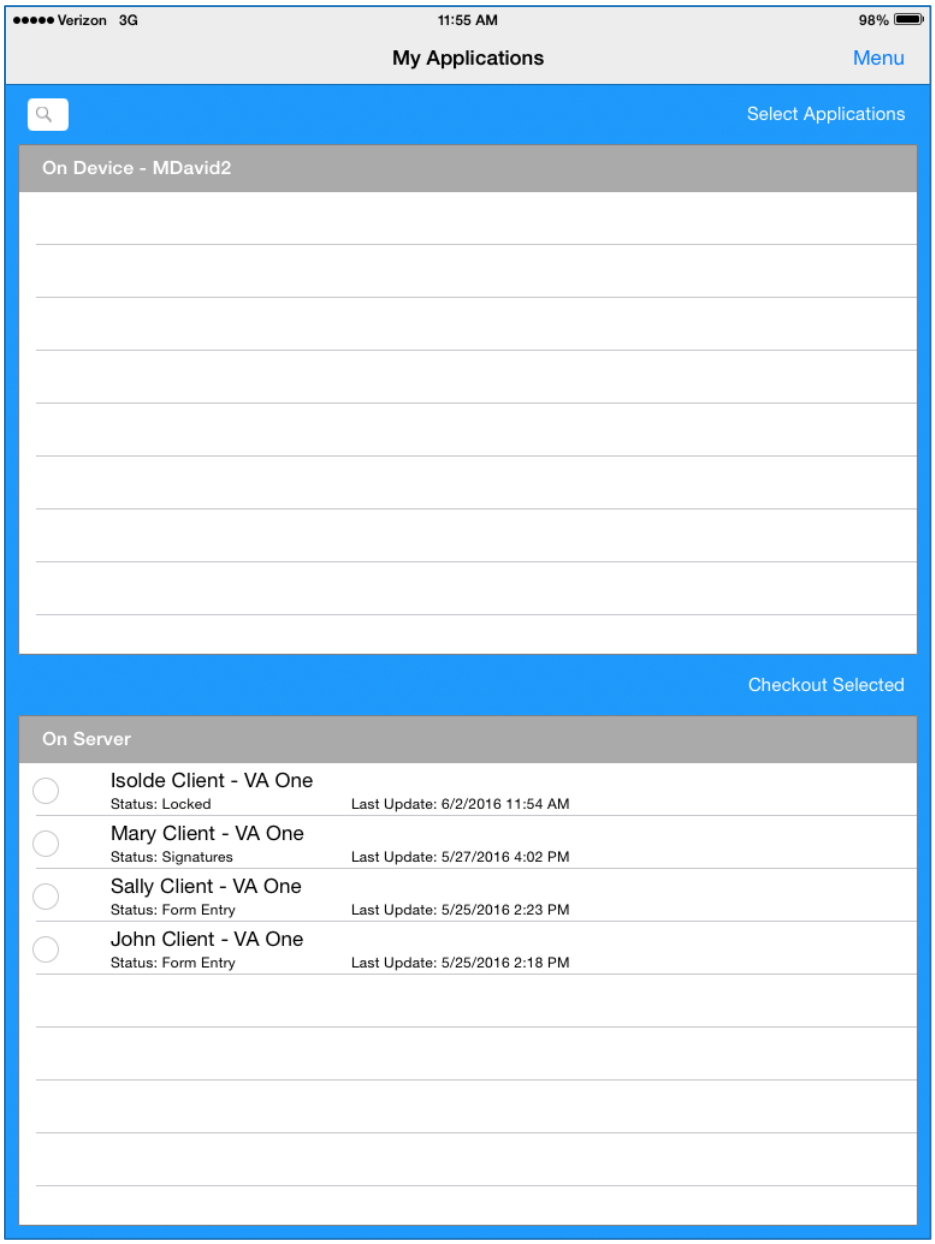
FireLight eApp opens to the My Applications home page.



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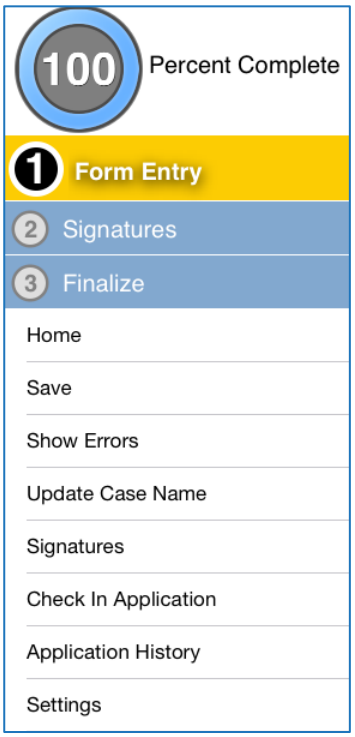
Action Menus

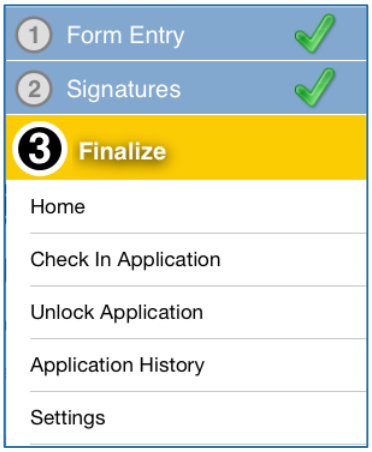
Tap the **Menu** link on the upper right of the FireLight eApp screen to access additional commands for the current window. The menu commands are different for each window depending on the application status. Use the menus to view and change FireLight eApp settings and to navigate FireLight eApp. The 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 Form Entry status and Pending Review status.

My Applications – Home



Application in Form Entry



Application in Pending Review

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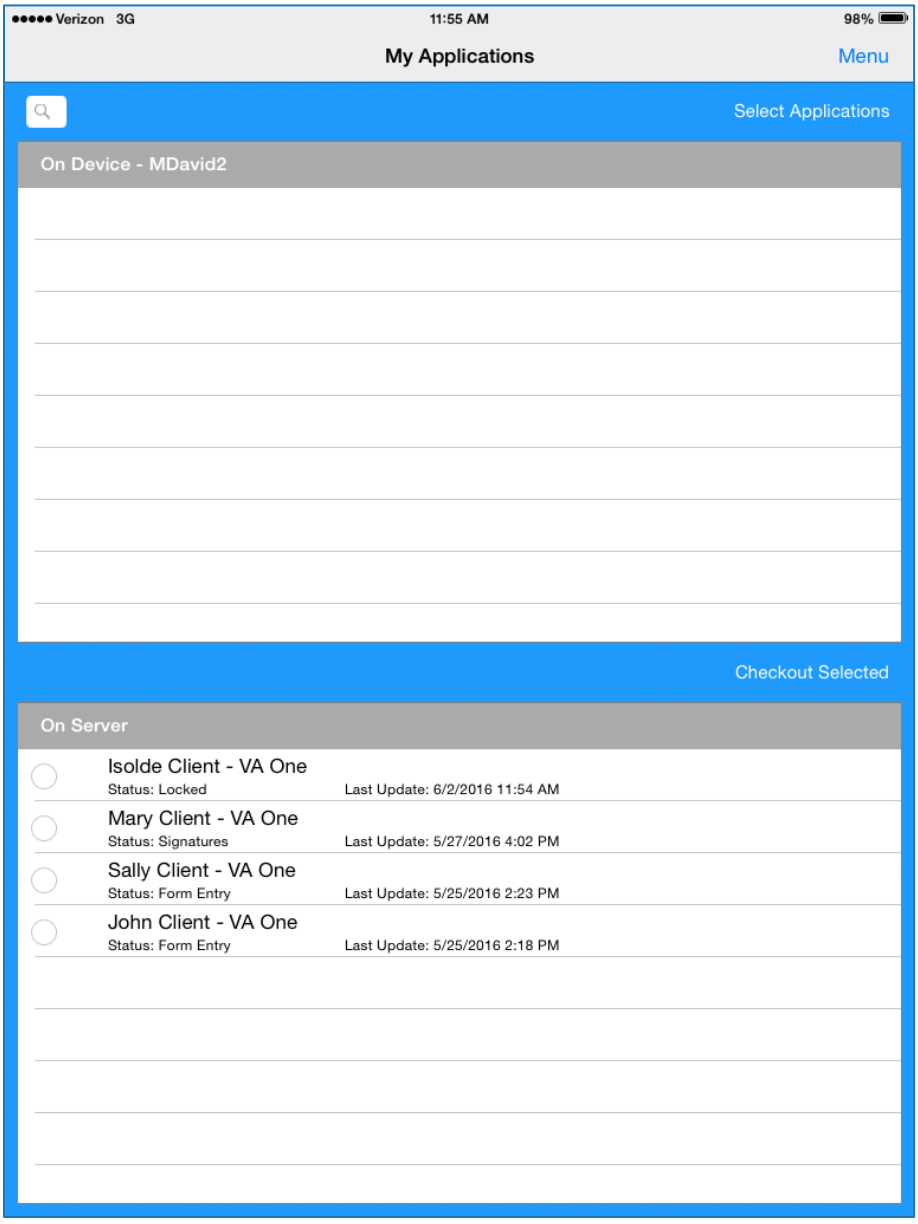
My Applications

Upon successful logon, FireLight eApp opens to the My Applications 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 FireLight eApp for working offline.
- Use the **On Device** grid to open and copy applications on FireLight eApp (offline or online), undo check-out for applications on FireLight eApp (online), or check in applications to the FireLight web server (online).



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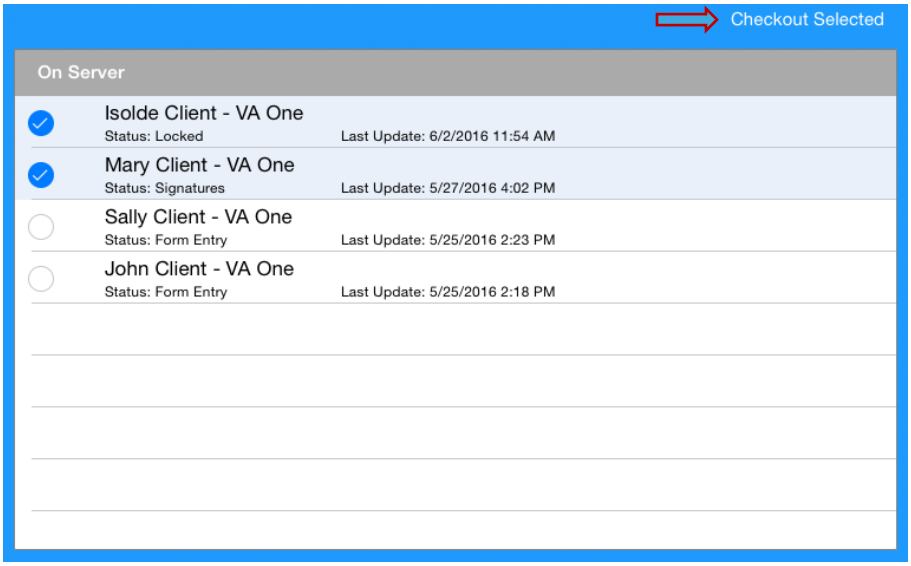
On Server

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

Check Out Applications from the FireLight Web Server

1. Log on to the Internet and log on to FireLight eApp to synchronize with the FireLight web server.
2. In the **On Server** grid, tap each application name to check out. A check mark appears next to the applications that you selected for check out.



TIP: Use the search box on the upper left of the My Applications page to enter search text for the application name. FireLight eApp searches for application names that contain the search text. Clear the search text to display the full list of your active applications.

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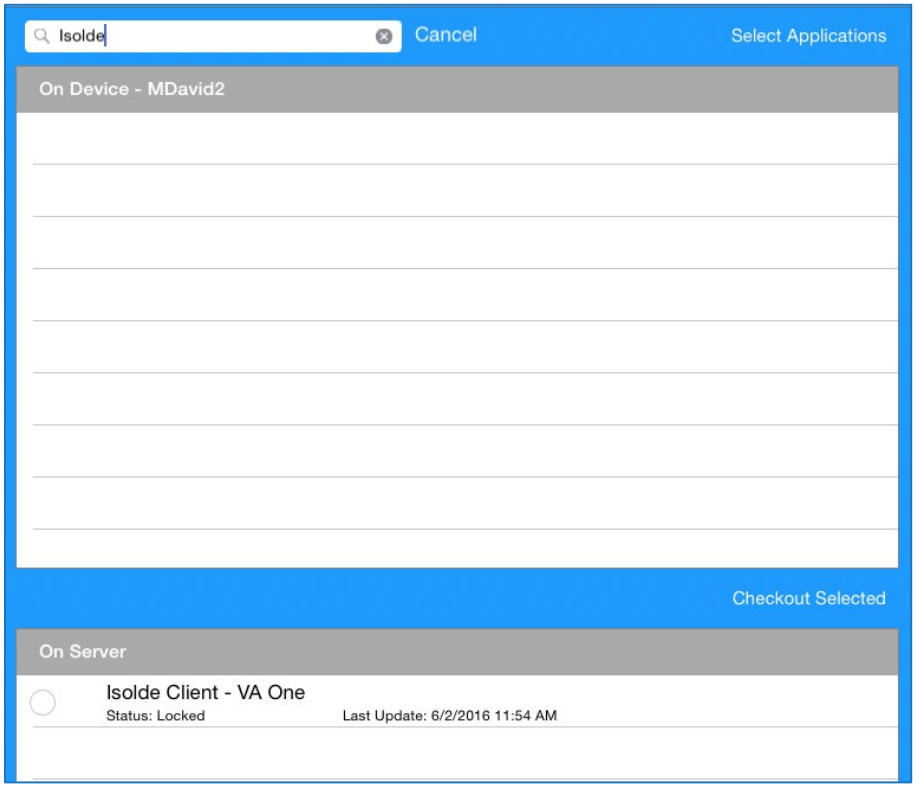
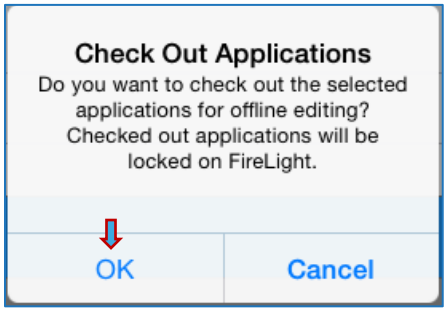


3. Tap an application name and tap **Checkout Selected**.
4. Tap **OK** on the **Check Out Applications** dialog box to check out the application(s) from the FireLight web server to FireLight eApp. Or, tap **Cancel** to cancel the check out and close the dialog box.



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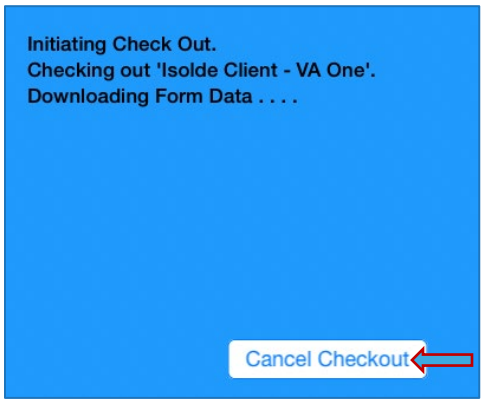
An “Initiating Check Out” message appears for each application. Tap **Cancel Checkout** to cancel checking out the application.



NOTE: When completed, the system changes the status of the checked out application to “Checked Out” on FireLight web server and you cannot edit the application in FireLight web server until you check in the application from FireLight eApp.

On Device

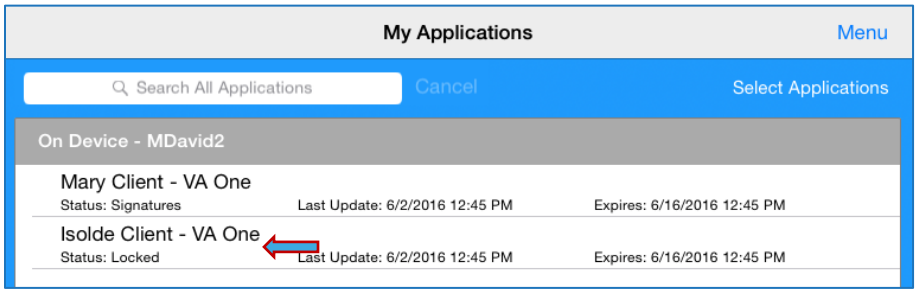
The On Device grid on the My Applications window contains a list of your active applications in FireLight that you checked out to FireLight eApp. You do not need to connect to the Internet to open or copy files in this grid.

IMPORTANT! The length of time before the application expires on FireLight eApp is on the right of each application row in the grid. Be sure to check in your updates before the application expires, or the system will discard the changes you made in FireLight eApp.

At the top of the **My Applications** window, tap **Select Applications** to access additional commands for the checked out applications.

Open an Application in FireLight eApp

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



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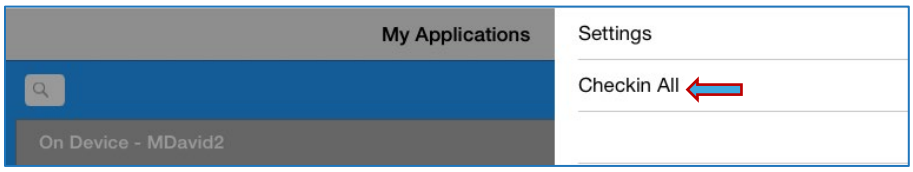
Check in Applications to the FireLight Web Server

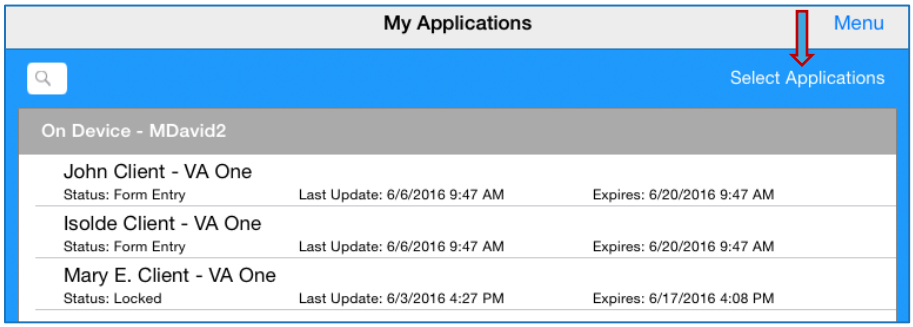
NOTE: If the application expires while checked out to FireLight eApp, the system discards all changes made in FireLight eApp and unlocks the application and makes it accessible on the FireLight web server.

When you finish updating an application, check in the application to the FireLight web server before expiration. **NOTE:** Also check in copies of applications created in FireLight eApp to the FireLight web server.

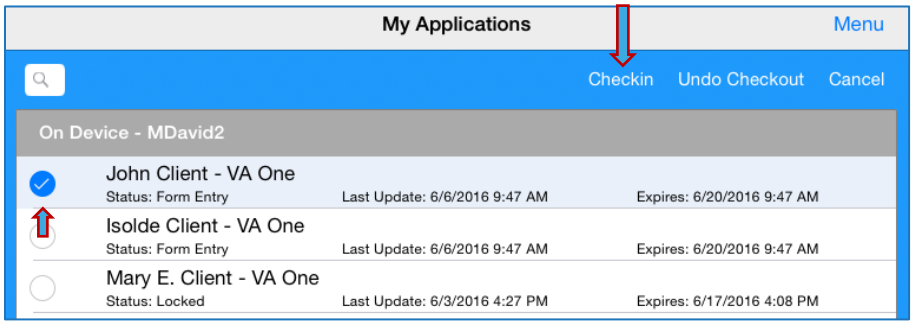
1. Log on to the Internet to synchronize with the FireLight web server.
2. To check in all of the applications, tap **Menu** on the upper right and then tap **Checkin All**.



3. To check in some of the applications do the following:
   Above the **On Device** grid, tap **Select Applications**.



4. Tap to select each application to check in. Tap **Checkin**. Or, tap **Cancel** to cancel the check in.



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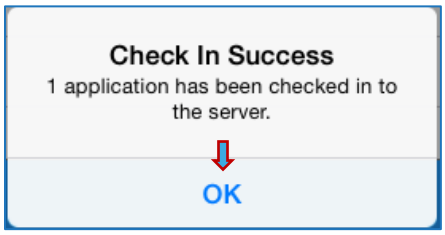
5. Tap **OK** on the Check In Success dialog box.



Optionally you can check in a single application with the slide menu option.
NOTE: You can now access the application on FireLight web server.

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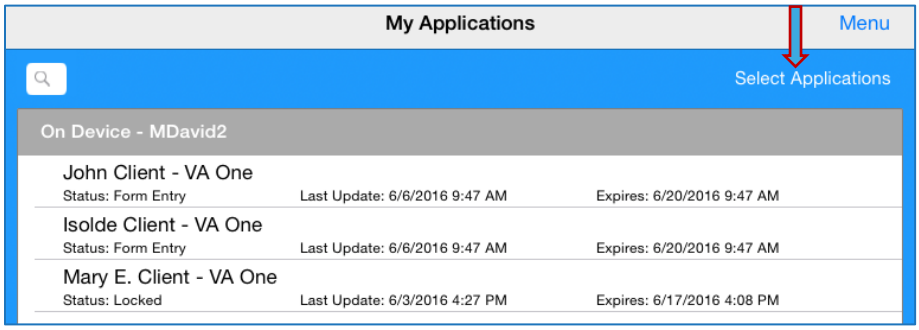
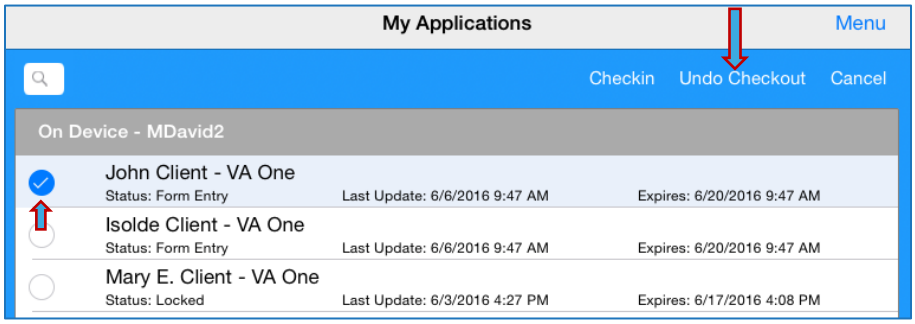
Undo Check-Out for Applications on FireLight eApp

IMPORTANT! When you undo checkout for an application, the system removes the application from the iPad tablet and discards all changes made to the application in FireLight eApp. To enable the Undo Checkout feature, see page 33.

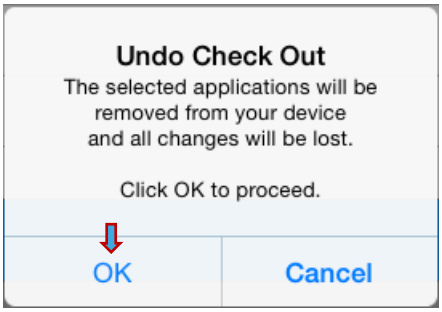
1. Log on to the Internet to synchronize with the FireLight web server.
2. Above the **On Device** grid, tap **Select Applications**.



3. Tap to select each application to undo check out and tap **Undo Check Out**. Or, tap **Cancel** to cancel the undo check out.



4. Tap **OK** on the Undo Check Out dialog box to undo the application checkout from the FireLight web server. Tap **Cancel** to cancel the undo check out.



NOTE: You can now access the application on the FireLight web server.

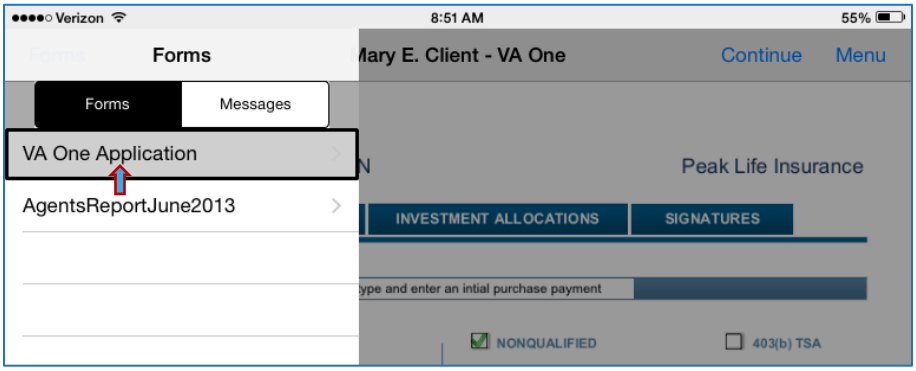
Update Applications in FireLight eApp

Update applications in FireLight eApp in a similar manner as in the FireLight web server program.

1. On the My Applications window under **On Device**, tap the application name to open the application.
2. Work through the application form pages by swiping left and right on the form pages to go to the next and previous pages.

   Tap **Forms** on the upper left to navigate form pages and view form field messages.

   a. Under **Forms**, tap the form name to open the form.



NOTE: A form name appears in red font when the form has errors.

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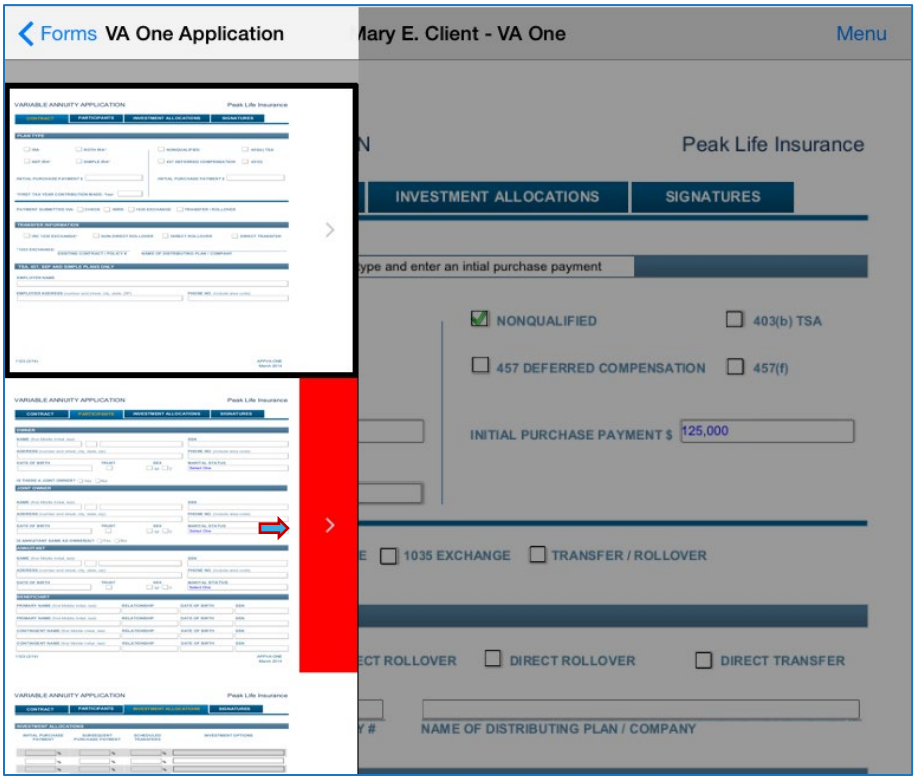
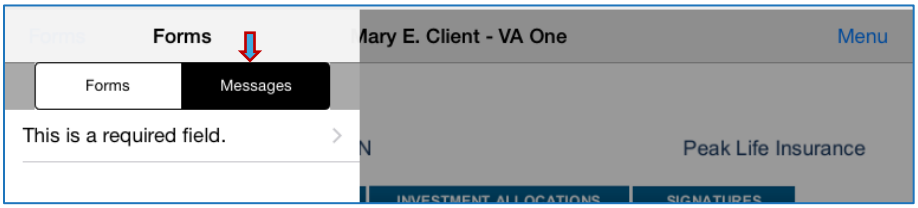
b. Slide up or down and tap a form page to open the page.
Pages with errors display a red bar on the right of the page.

Tap the form page to open the page.



c. To show form field messages, tap **Forms** on the upper left and tap **Messages**.



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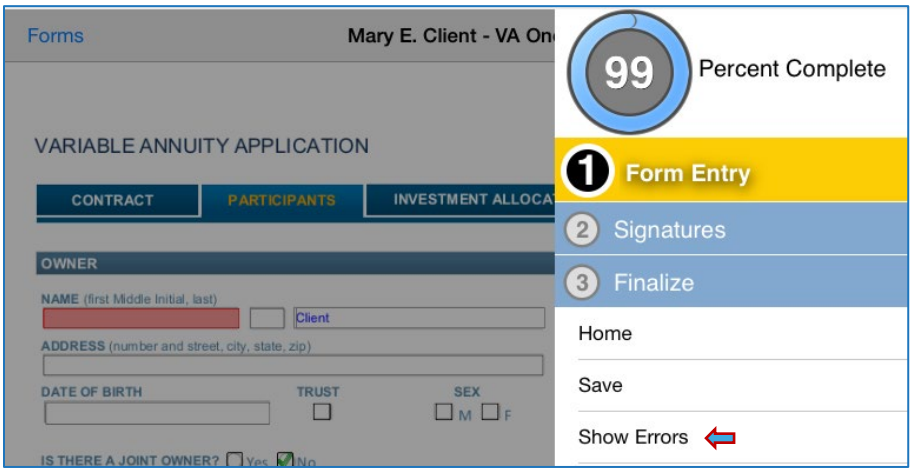
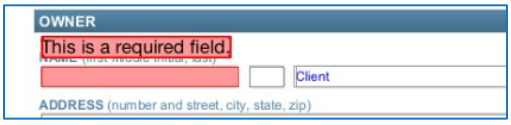
Tap **Menu** on the upper right and tap **Show Errors**.



Form field messages appear above the fields.



NOTE: Messages can overlap if many fields have errors. If the overlap occurs, tap **Menu** on the upper right and tap **Hide Errors** to turn off showing errors.

3. When form entry is completed, tap **Continue** 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.

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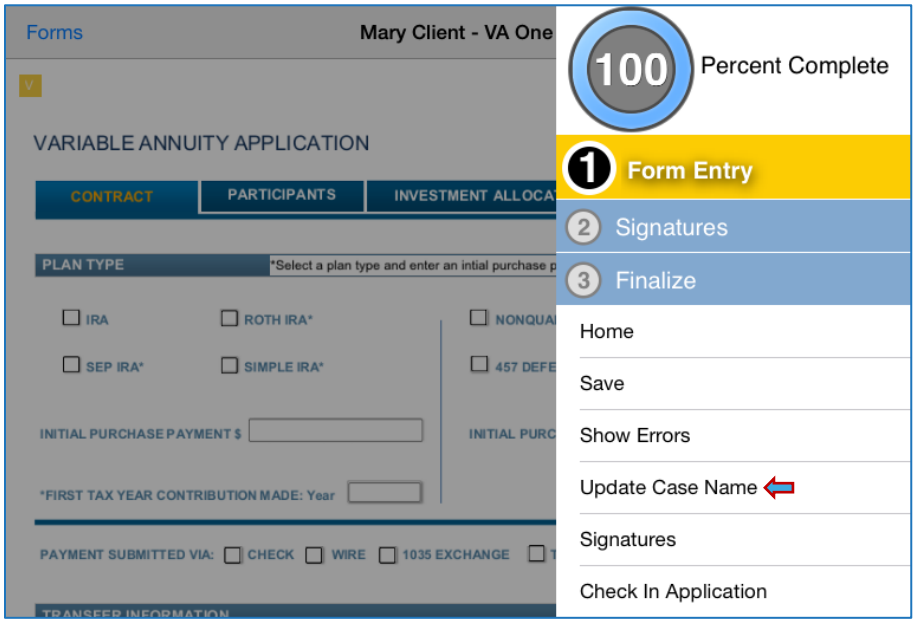
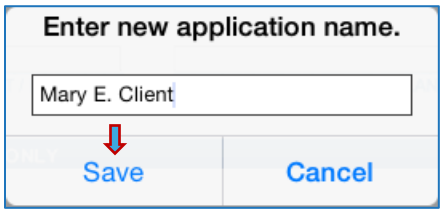
Change an Application Name

1. On the My Applications window under **On Device**, tap the application name to open the application.
2. On the upper right, tap **Menu** and then tap **Update Case Name**.



3. In the **Enter new application name** dialog box, enter the new name of the application and tap **Save**. Or, tap **Cancel** to cancel updating the case name.



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

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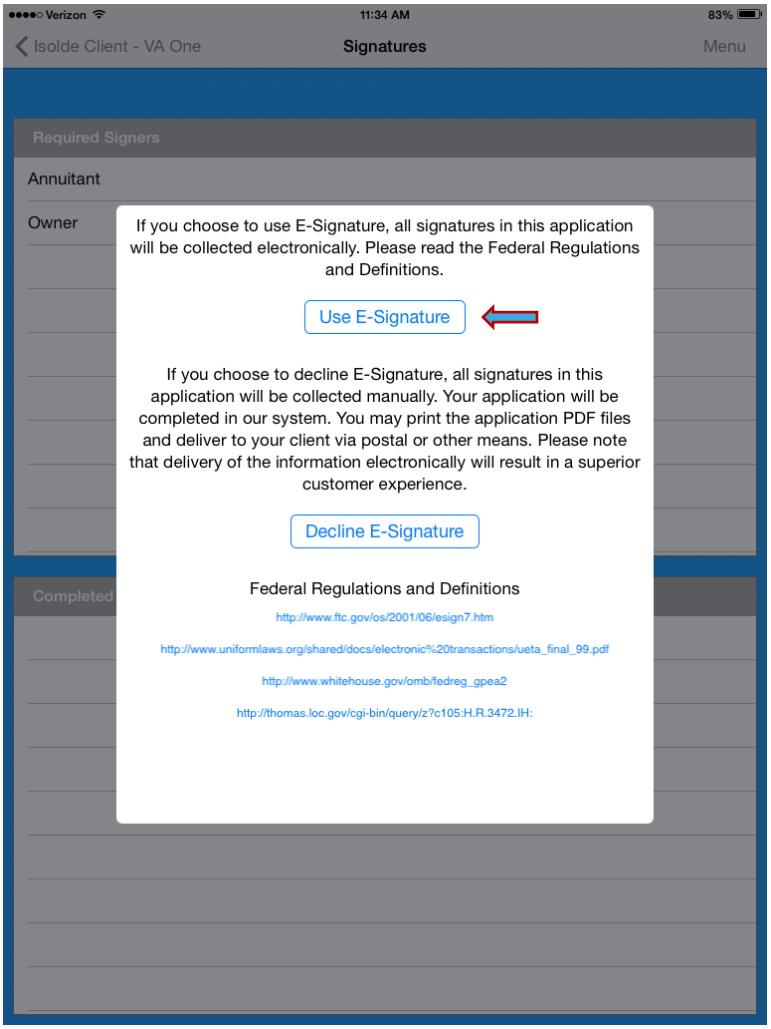
Sign an Application

The application is ready for signing when all the required "in-good-order" information is entered in the Form Entry phase. The following dialog box appears when Form Entry requirements are met.

1. Tap **Continue** on the **Form Entry has met the requirements** dialog box. Or, tap **Close** to return to the application and enter more data.

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



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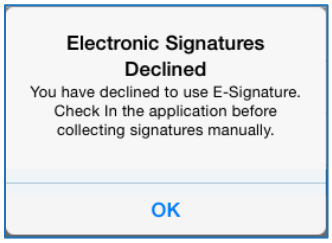
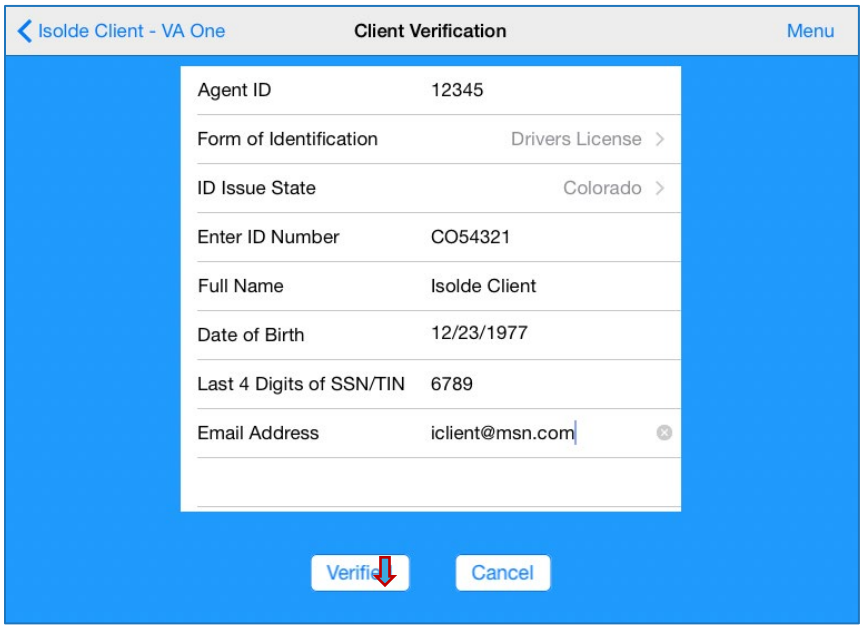
Tap **Decline E-Signature** to not use e-signature and then tap **OK** on the Electronic Signatures Declined dialog box. You need to check in the application to the FireLight web server before collecting signatures manually. See "Check in Applications to the FireLight Web Server" on page 17.



3. Under **Required Signers**, tap the role for the first signer.

4. Enter your Agent ID and the Client Verification information and tap **Verified**. Or, tap **Cancel** to cancel the signature process.

   TIP: Enter dates by tapping the Date of Birth box and scrolling the month, day and year.



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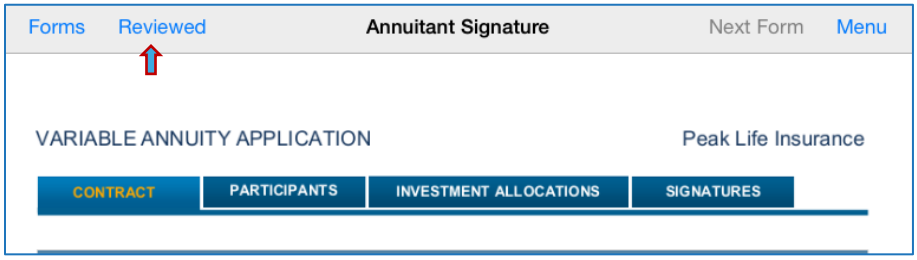
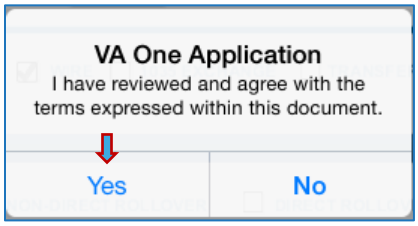
5. The signer reviews all of the application pages.

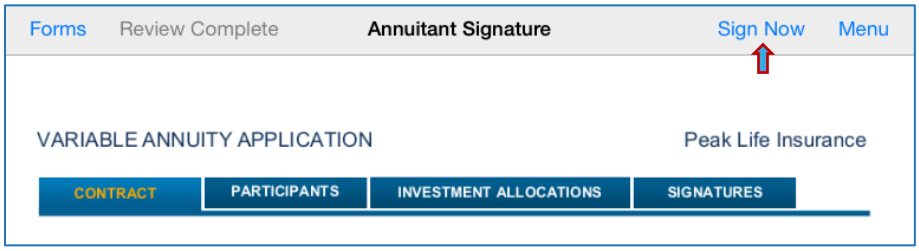
   The signer taps **Reviewed** above the form page.



6. On the review confirmation dialog box, the signer taps **Yes** to proceed. Or, the signer taps **No** to return to the application for further review.

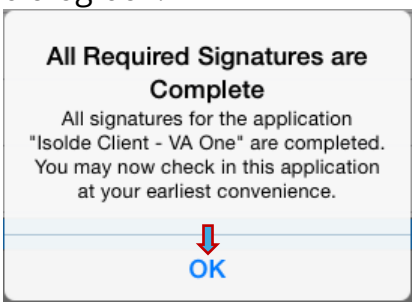


7. When all forms have been reviewed, the signer taps **Sign Now**.



8. The signer enters their Full Name and City, signs using the signature pad, and taps **I Consent**.

9. Repeat the same steps for each signer.
10. When signatures are complete, tap **OK** on the **All Required Signatures are Complete** dialog box.



On the My Applications window, the application status is set to Pending Review.

11. The application is now complete and ready for check in to the FireLight web server. See “Check in an Application from the Menu” on page 31.

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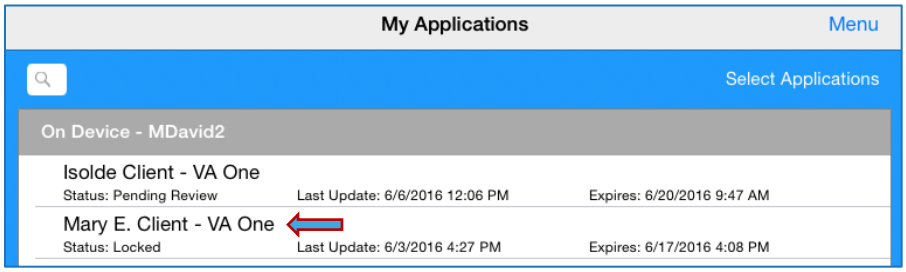
Unlock an Application

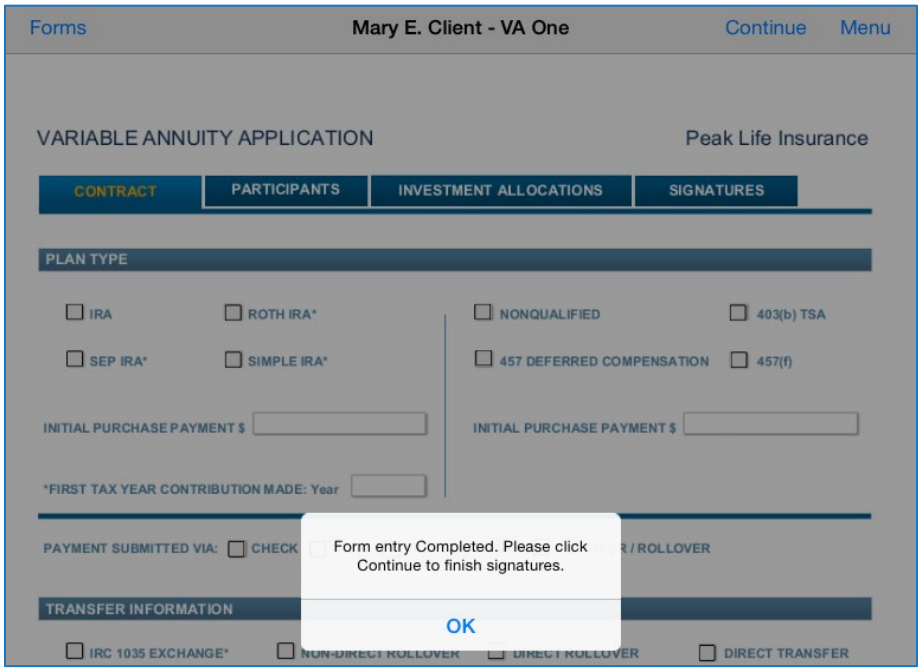
CAUTION: Unlocking an application will revoke all previously captured signatures and reviews for the application.

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 in the **On Device** grid, tap the application name.



   The application opens. In the following example, the application has some signatures already captured.



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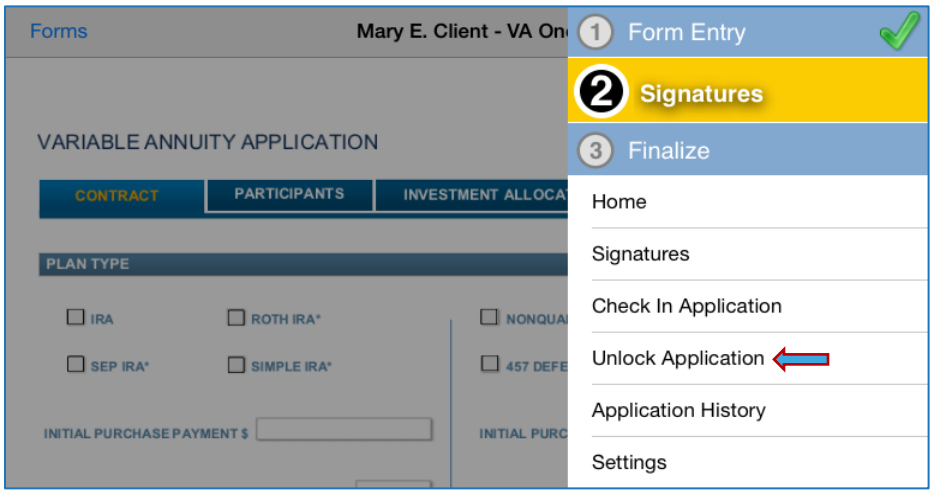
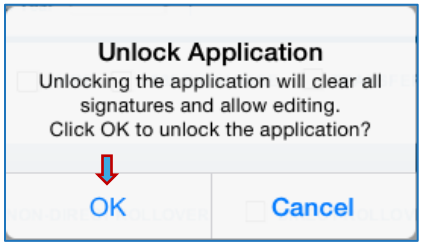
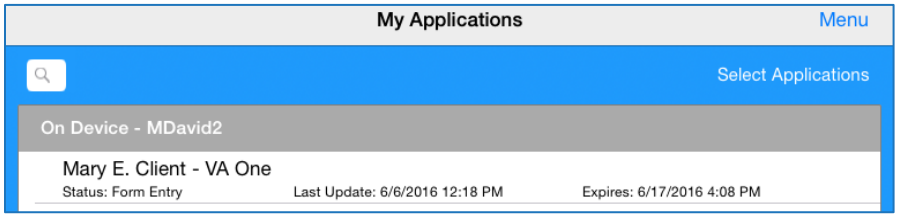
2. On the upper right, tap **Menu** and tap **Unlock Application**.



3. On the Unlock Application dialog box, tap **OK**.



The system revokes previously captured signatures and returns the application to the Form Entry phase.



4. On the **My Applications** window, tap the application name to open the application and update form data.

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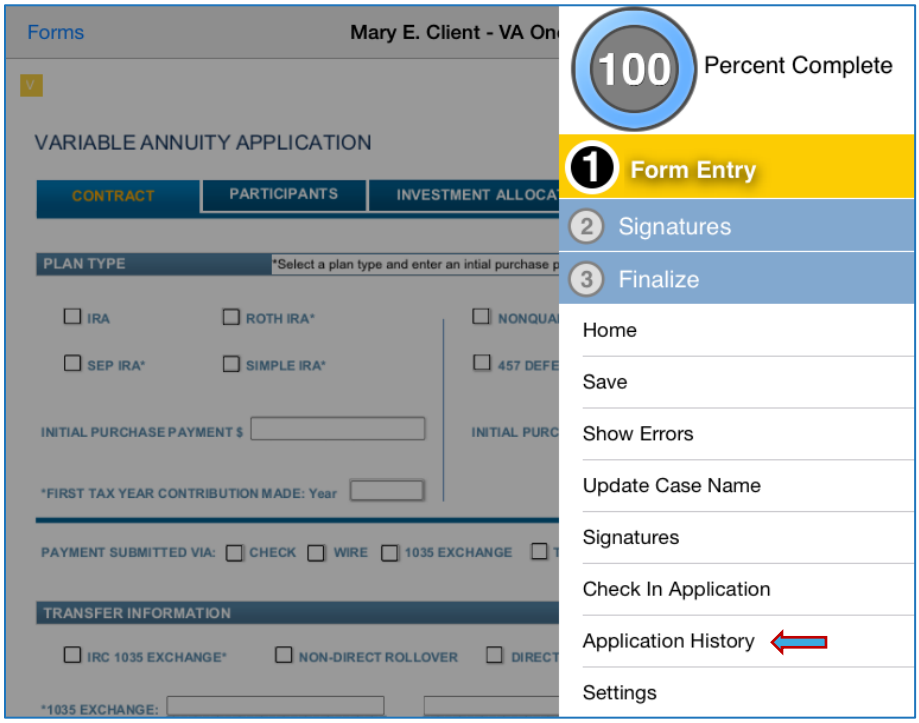
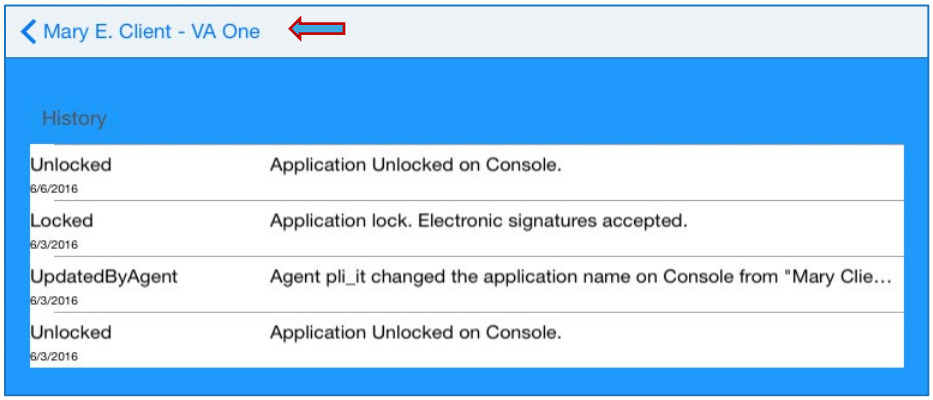
View Application History

1. On the My Applications window under **On Device**, tap an application name to open the application.
2. On the upper right tap **Menu** and tap **Application History**.



The History window displays the actions taken while the application was checked out to FireLight eApp. These will be included in the full application history when the application is checked in to the FireLight web server.



3. On the upper left, tap the application name to return to the application.

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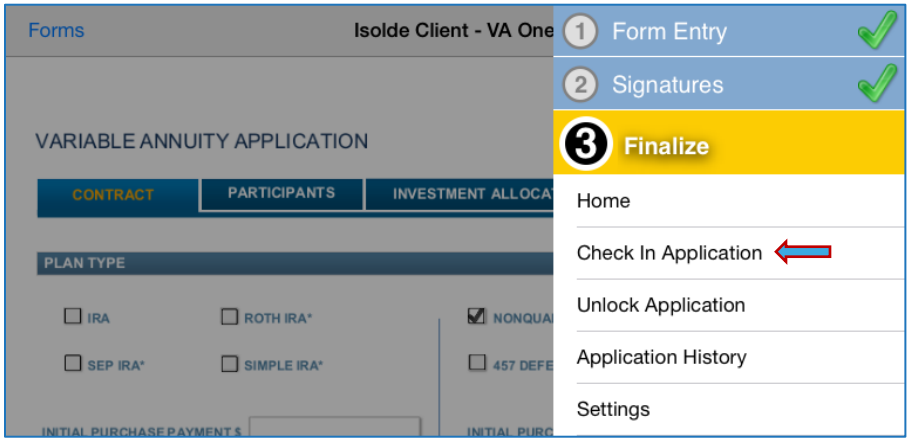
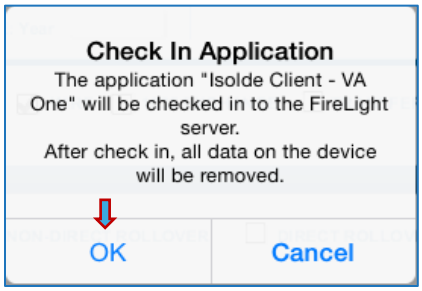
Check In an Application from the Menu

When finished updating the application forms, you can log on to the Internet and check in the application using a menu command as follows. (You can check in the application from the My Applications window. See page 17 for details.)

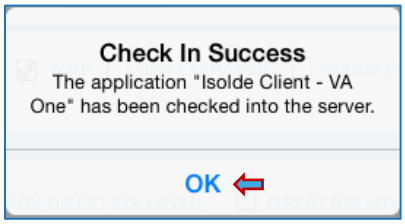
1. Log on to the Internet.
2. Tap the application name to open the application.
3. On the upper right, tap **Menu** and tap **Check-In Application**



4. Tap **OK** on the Check-In Application dialog box. Tap **Cancel** to leave the application checked out on FireLight eApp.



5. Tap **OK** on the Check-In Success dialog box to close the dialog box and return to the My Applications window.



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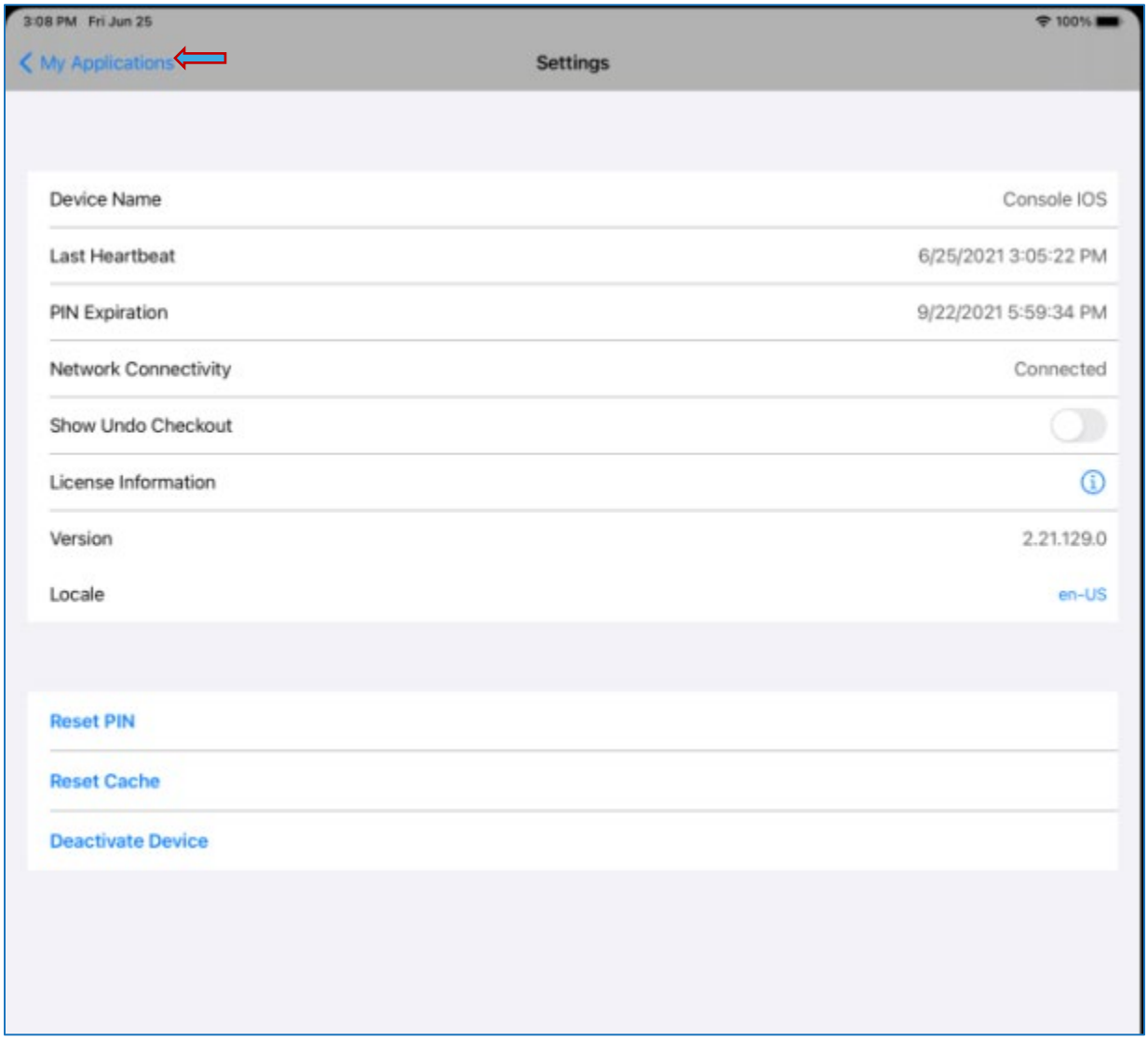
FireLight eApp Settings

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

View Device Information

1. Tap the **Menu** link on the upper right of the My Applications window and tap **Settings**. On the **Settings** window, view the device name, date and time of the last heartbeat check with the FireLight web server, the PIN (password) expiration date and time for FireLight eApp, the FireLight eApp version, and the Locale.



2. On the **Settings** window, tap **My Applications** on the upper left to return to the My Applications window.

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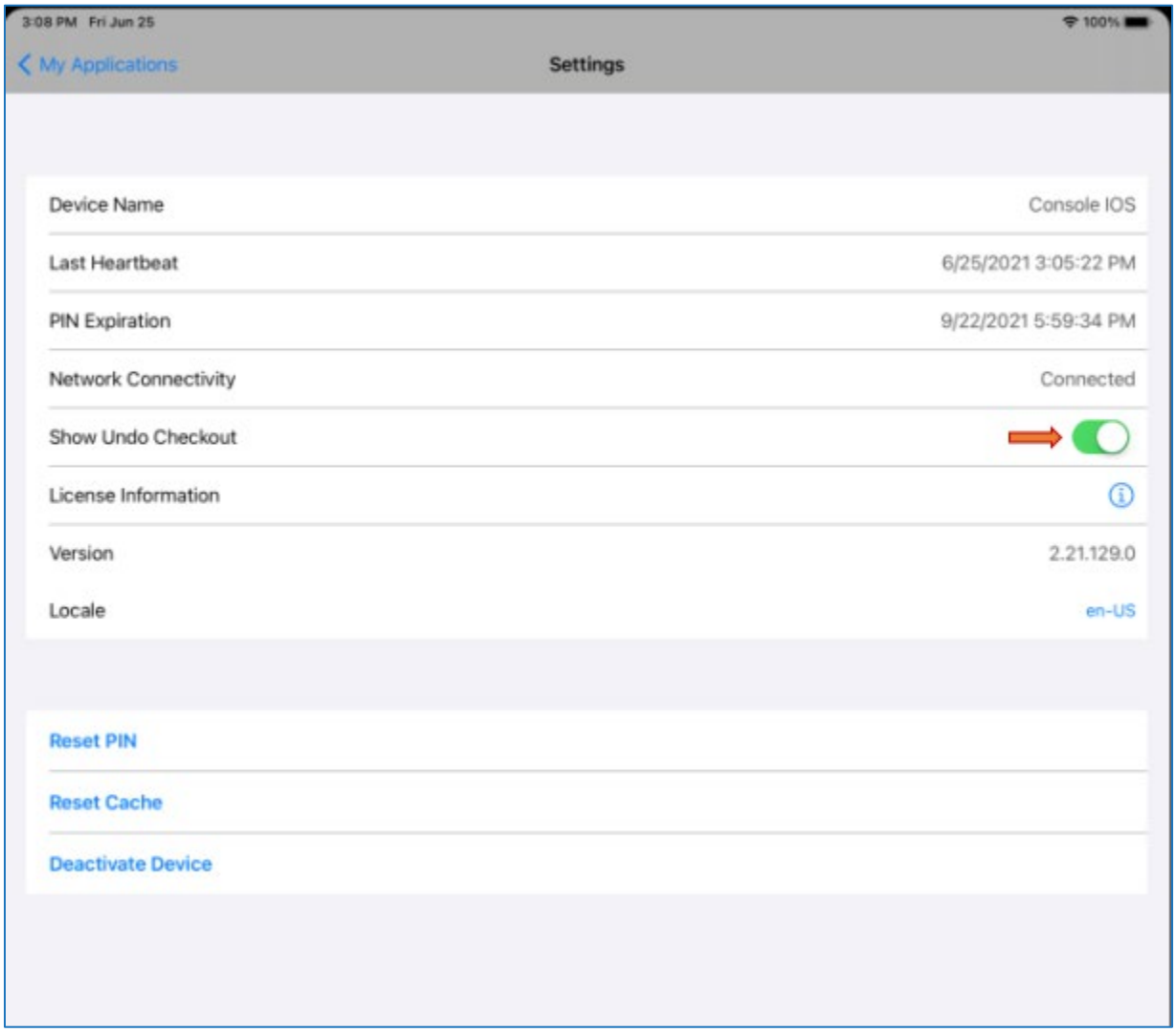
Show Undo Checkout

Enable the Show Undo Checkout feature to activate Undo Check Out in My Applications so you can undo check out of applications from the FireLight web server. See page 19 for details.

1. Tap the **Menu** link on the upper right of the My Applications window and tap **Settings**.
2. On the Settings window, slide the **Show Undo Checkout** button to the right. When activated, it will show with a green background.



3. On the Settings window, tap **My Applications** on the upper left to return to the My Applications window.

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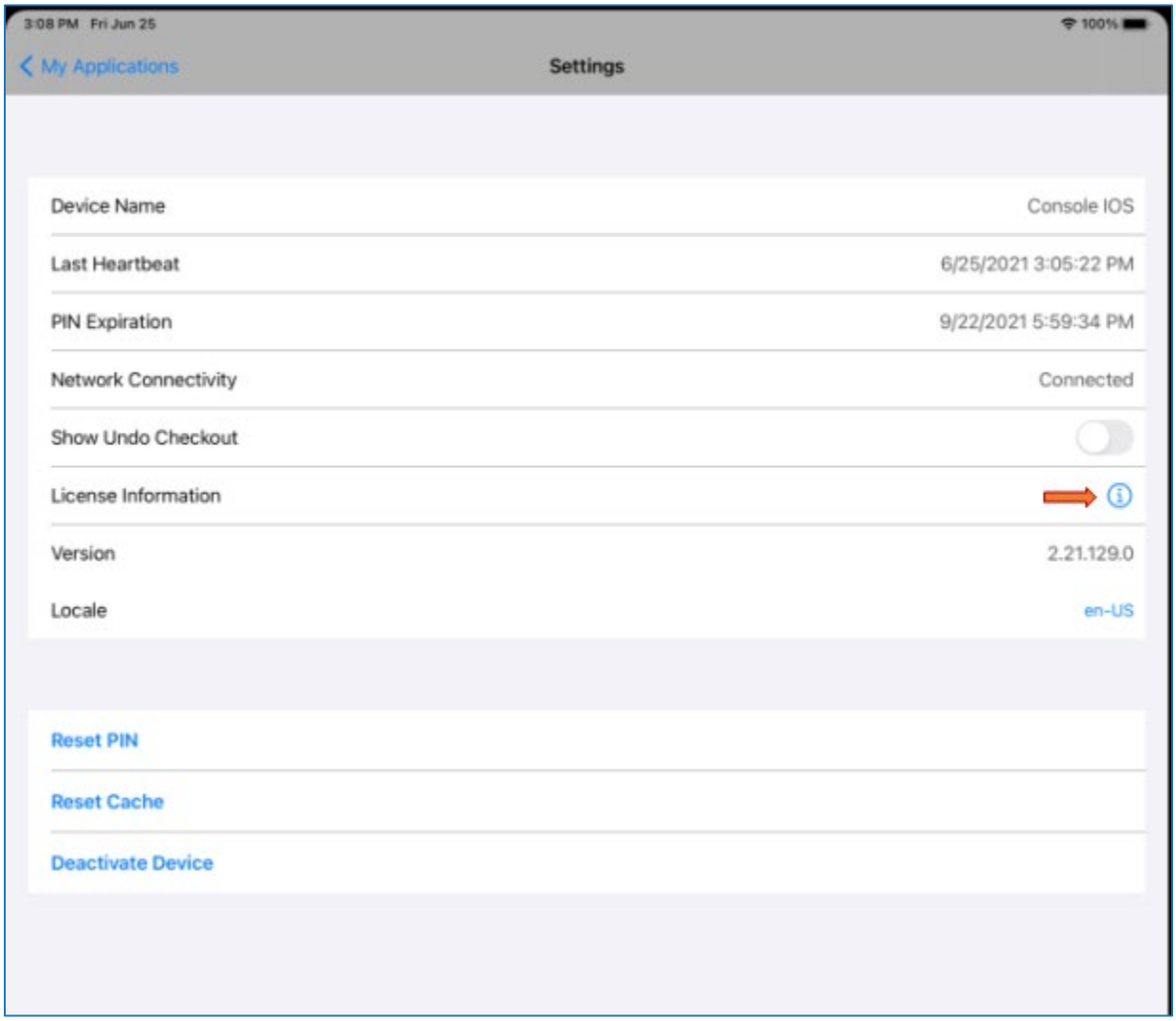
License Information

1. Tap the **Menu** link on the upper right of the My Applications window and tap **Settings**.
2. On the Settings window, tap the **License Information** icon ⓘ.



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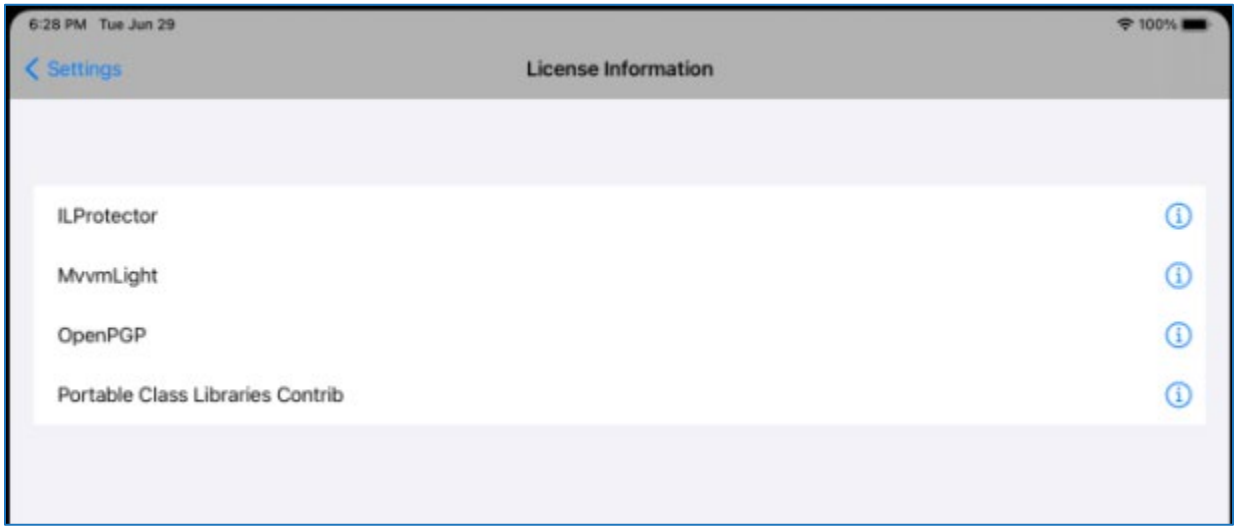
3. View license information by tapping the applicable icon ⓘ. When finished viewing, tap **Settings** on the upper left.



4. On the **Settings** window, tap **My Applications** on the upper left to return to the My Applications window.

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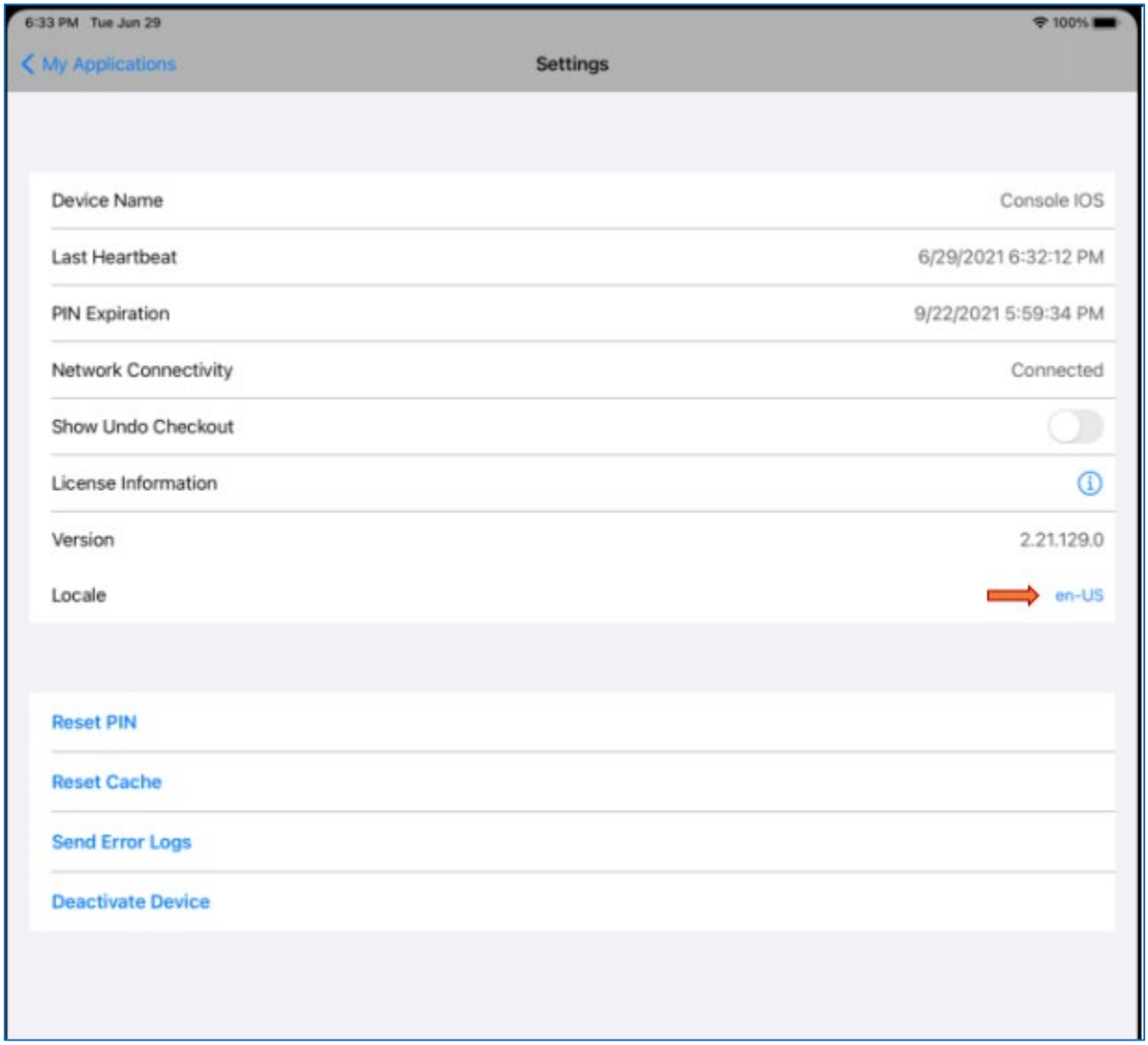
Locale

1. Tap the **Menu** link on the upper right of the My Applications window and tap **Settings**.
2. On the Settings window, tap the **Locale** link on the right.



3. Tap a Locale language. When finished, tap **Settings** on the upper left.

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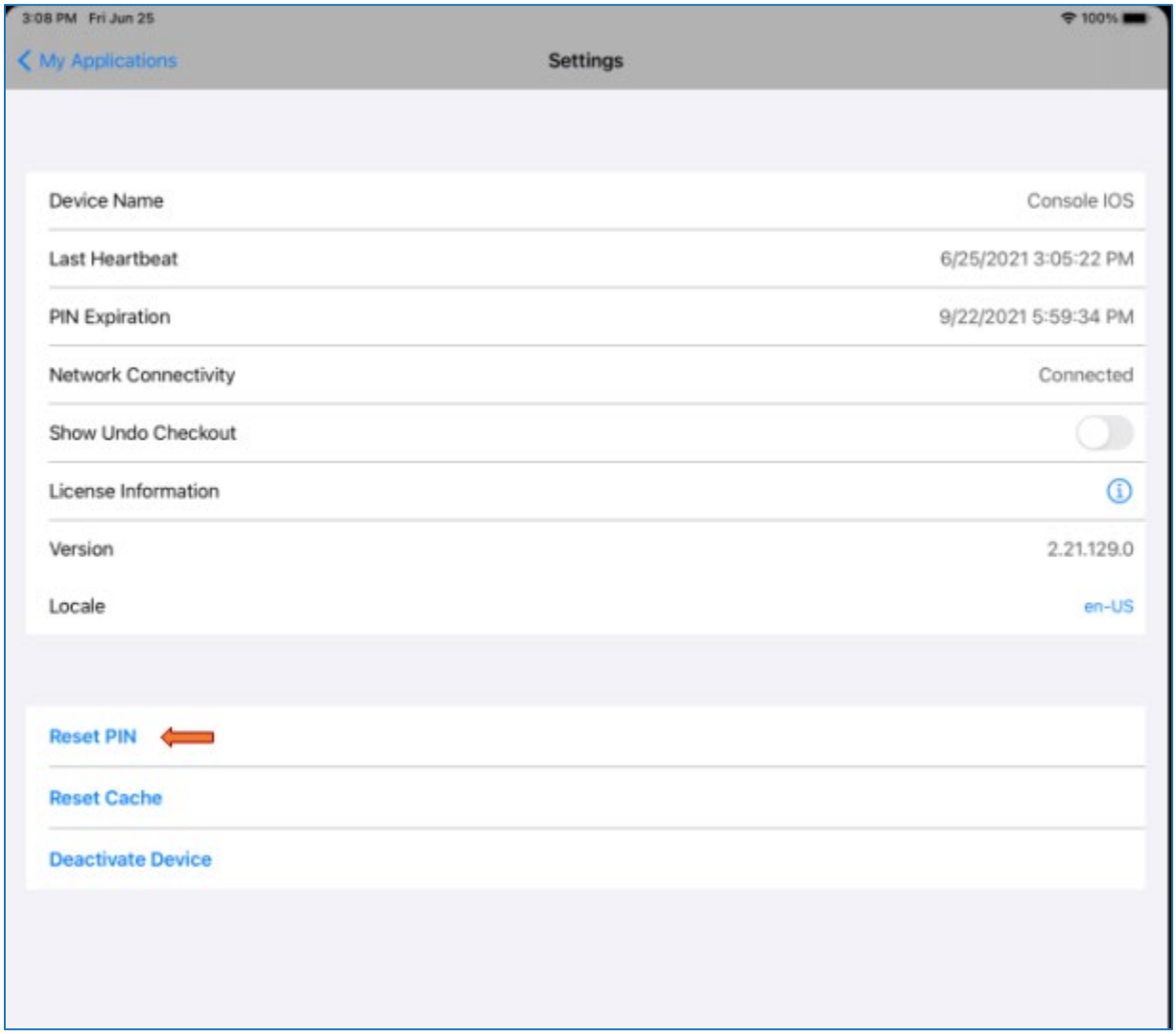
4. On the **Settings** window, tap **My Applications** on the upper left to return to the My Applications window.

Reset PIN

NOTE: If you initiate Reset Password from the FireLight web program, see Start and Log On to FireLight eApp for FireLight eApp login instructions.

1. Tap the **Menu** link on the upper right of the My Applications window and tap **Settings**.
2. On the Settings window, tap **Reset PIN**.



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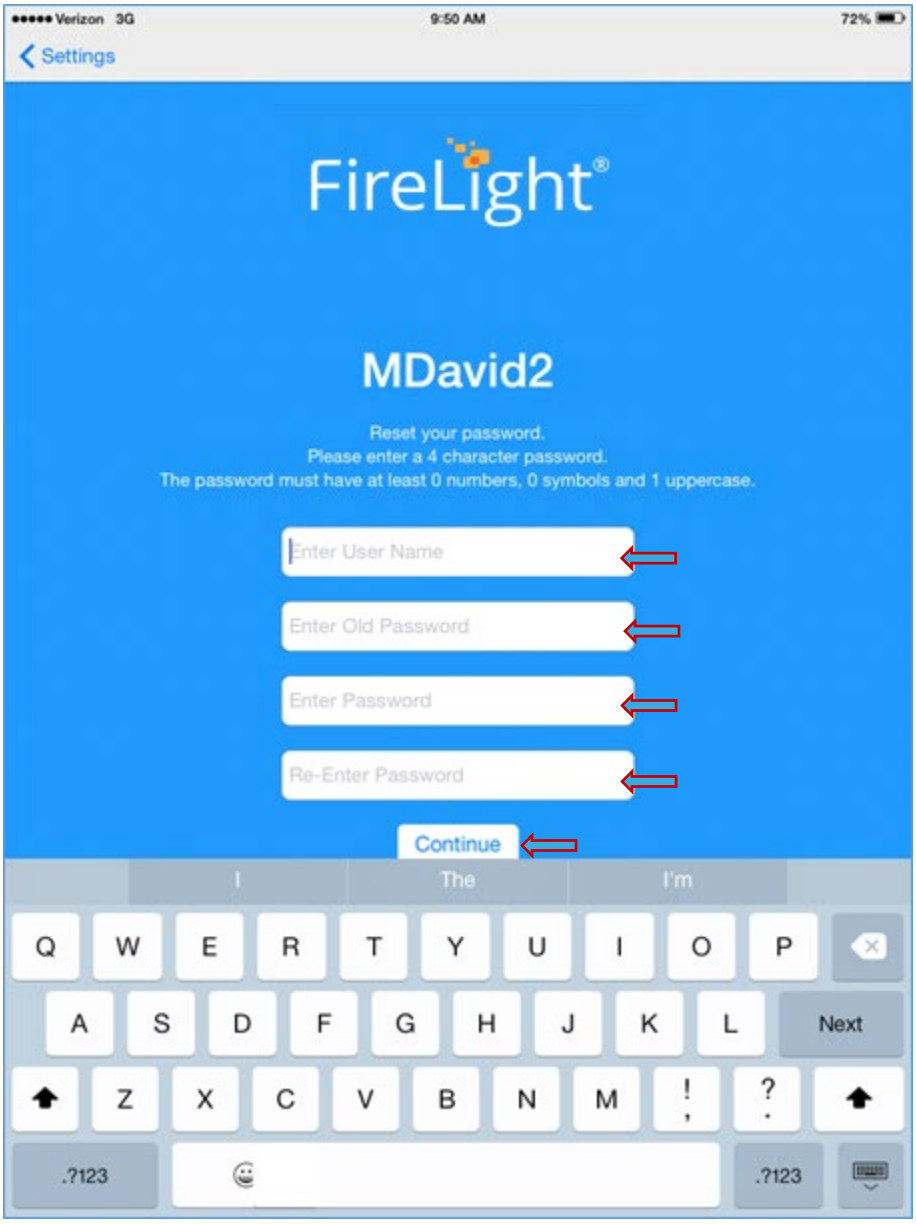
3. Enter your user name (if required for your organization) and old and new password information as shown below.



4. Tap **Continue** to save your new PIN. Or, tap **Settings** on the upper left of the window to cancel resetting the PIN and return to the Settings window.
5. On the Settings window, tap **My Applications** on the upper left to return to the My Applications window.

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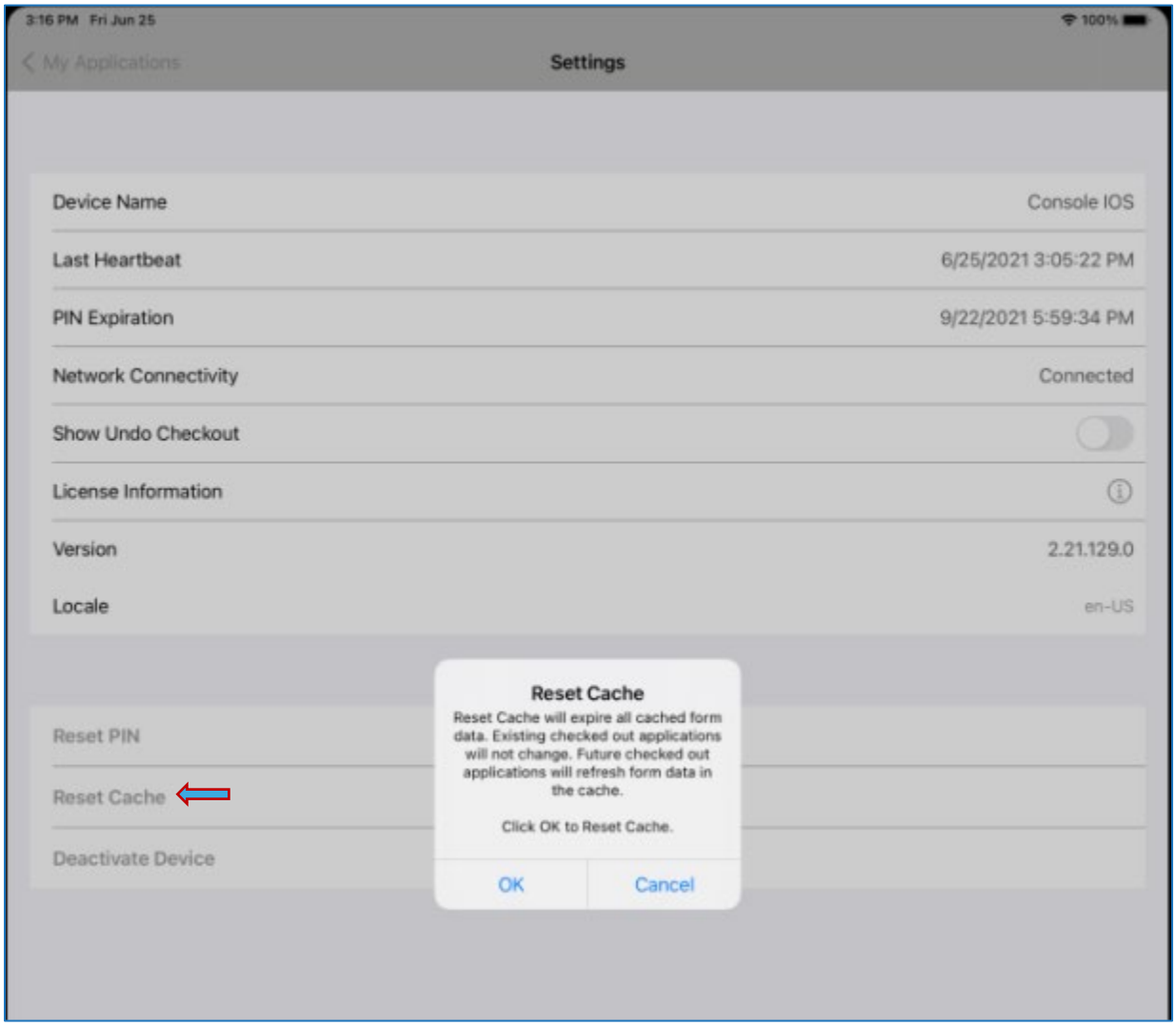
Reset Cache

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

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

1. Tap the **Menu** link on the upper right of the My Applications window and tap **Settings**.
2. On the Settings window, tap **Reset Cache**.



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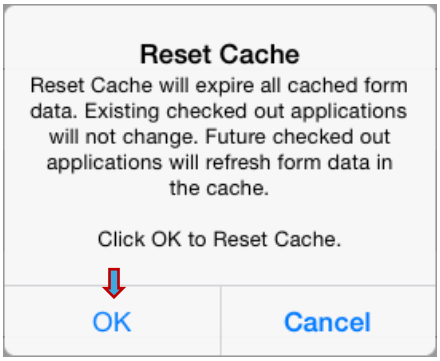
3. Tap **OK** on the Reset Cache dialog box to reset the cache. Or, tap **Cancel** to cancel resetting the cache.



4. On the Settings window, tap **My Applications** on the upper left to return to the My Applications window.

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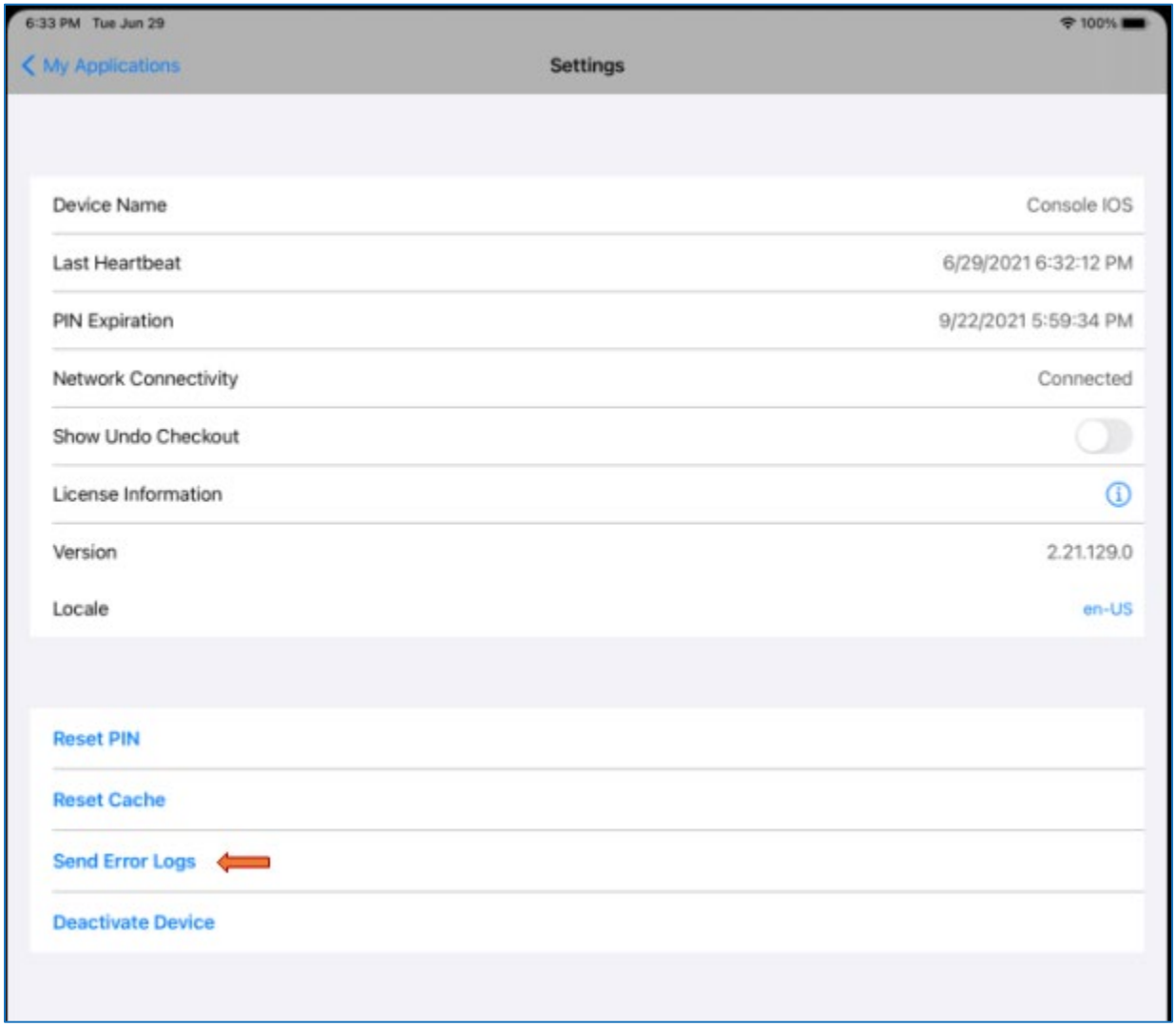
Send Error Logs

1. Tap the **Menu** link on the upper right of the My Applications window and tap **Settings**.
2. On the Settings window, tap **Send Error Logs**.



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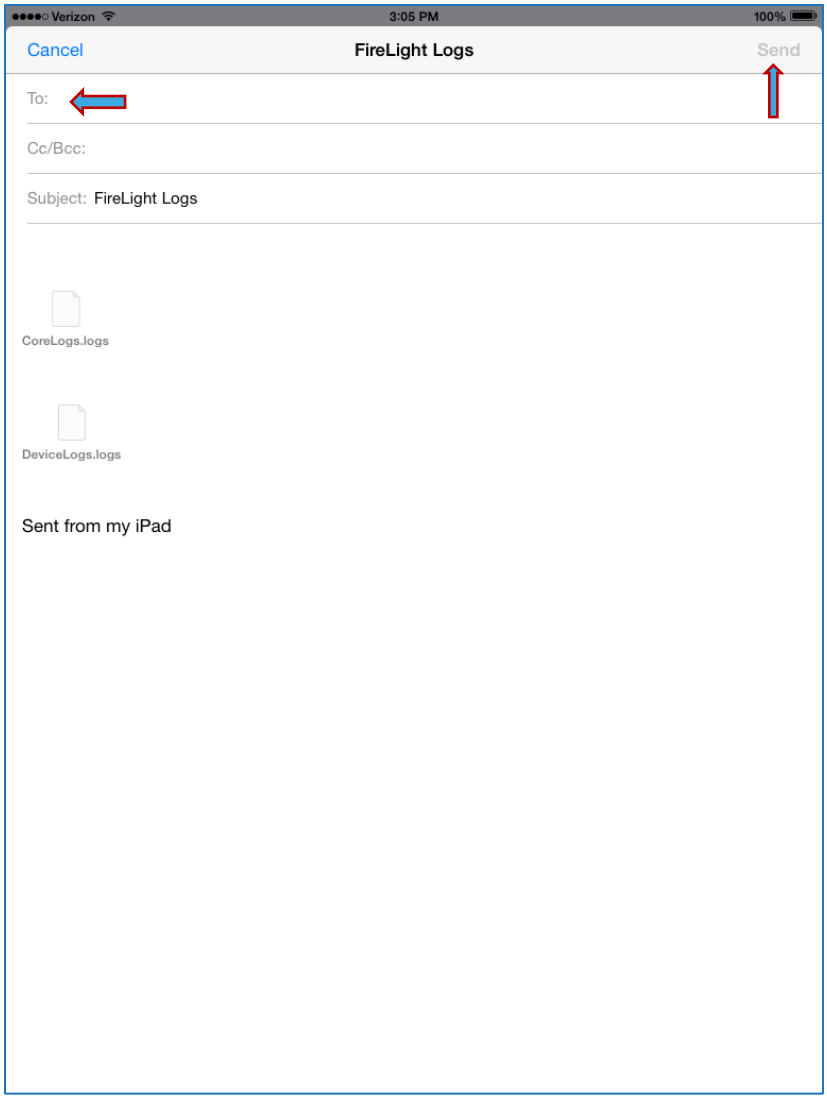
3. Enter the email address of the recipient in the **To** box. On the upper right, tap **Send**. Or on the upper left, tap **Cancel** to cancel sending the error logs.



4. On the Settings window, tap **My Applications** on the upper left to return to the My Applications window.

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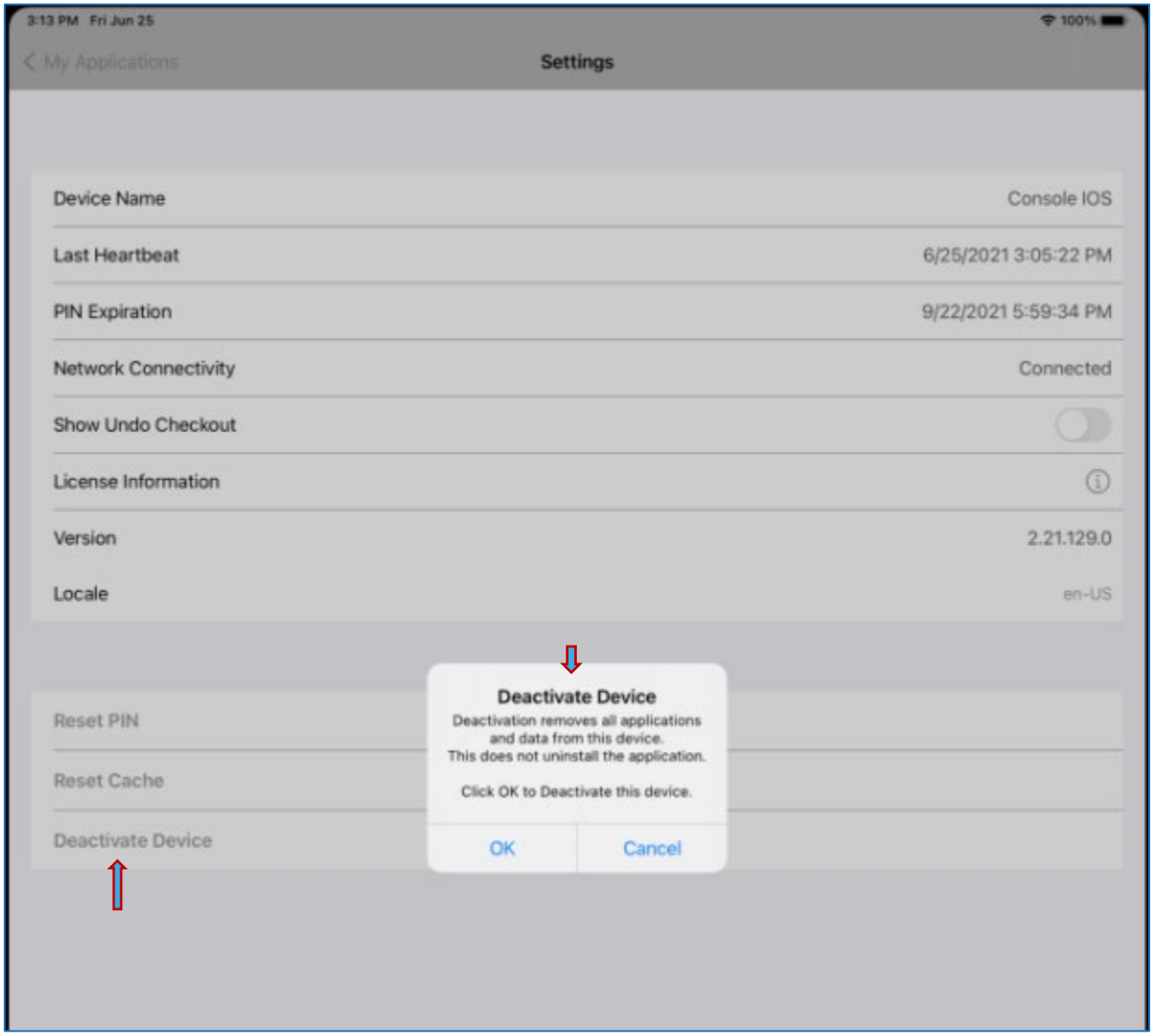
Deactivate Device

1. Tap the **Menu** link on the upper right of the My Applications window and tap **Settings**.
2. On the Settings window, tap **Deactivate Device**.



3. Tap **OK** on the **Deactivate Device** dialog box to deactivate the device in FireLight eApp. Or, tap **Cancel** to cancel deactivating the device.

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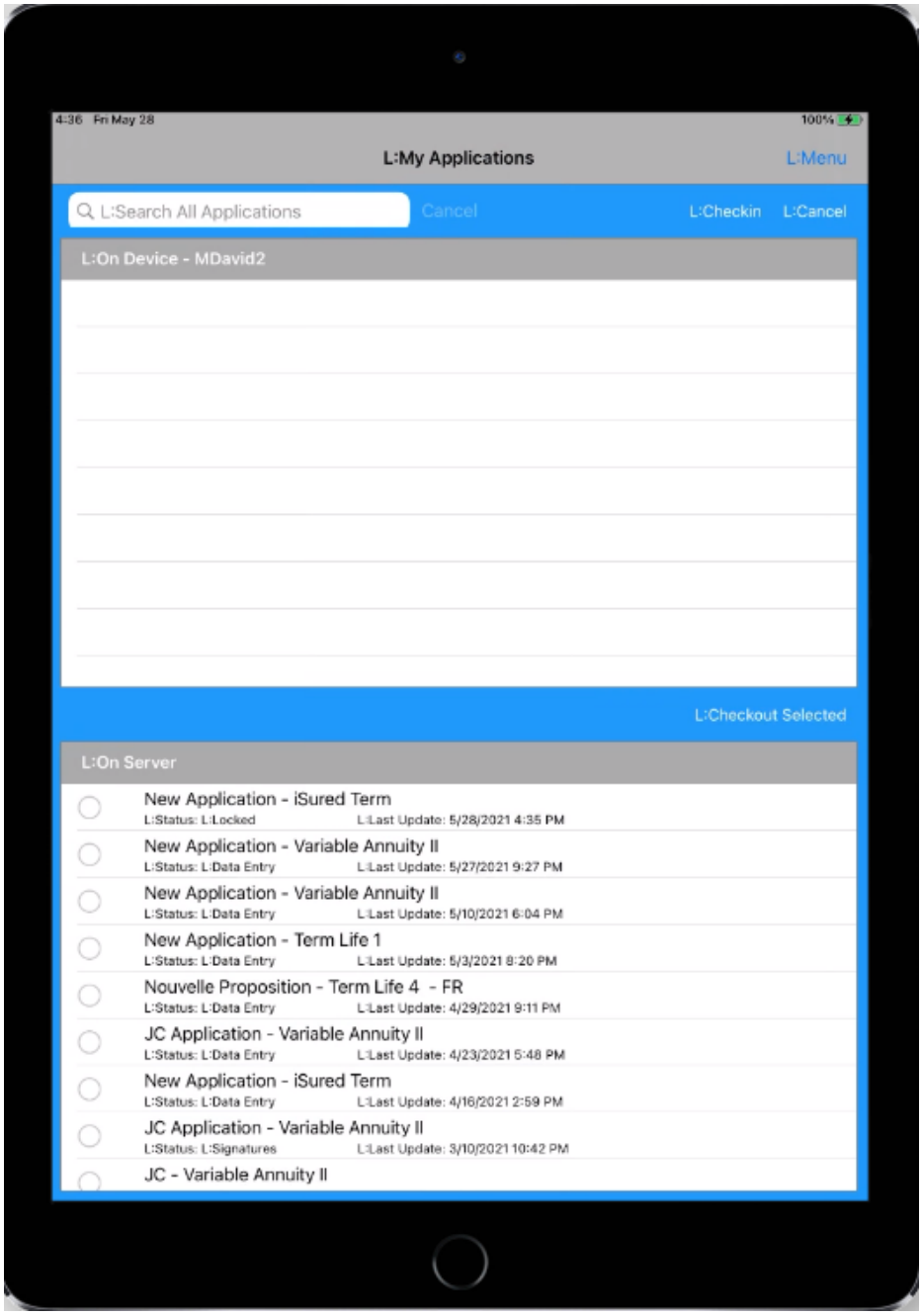
Exit the FireLight eApp

Exit the FireLight eApp

Tap the round home button at the bottom of the iPad. This places the FireLight e-App in sleep mode, but does not fully close it down.



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Close and Shut Down the FireLight eApp

To completely close down FireLight e-App, tap the round home button at the bottom of the iPad to open a preview window of the apps you have recently used. Swipe left or right to locate FireLight eApp. Swipe the FireLight e-App preview window to the top and off the screen to completely close down and exit FireLight eApp.

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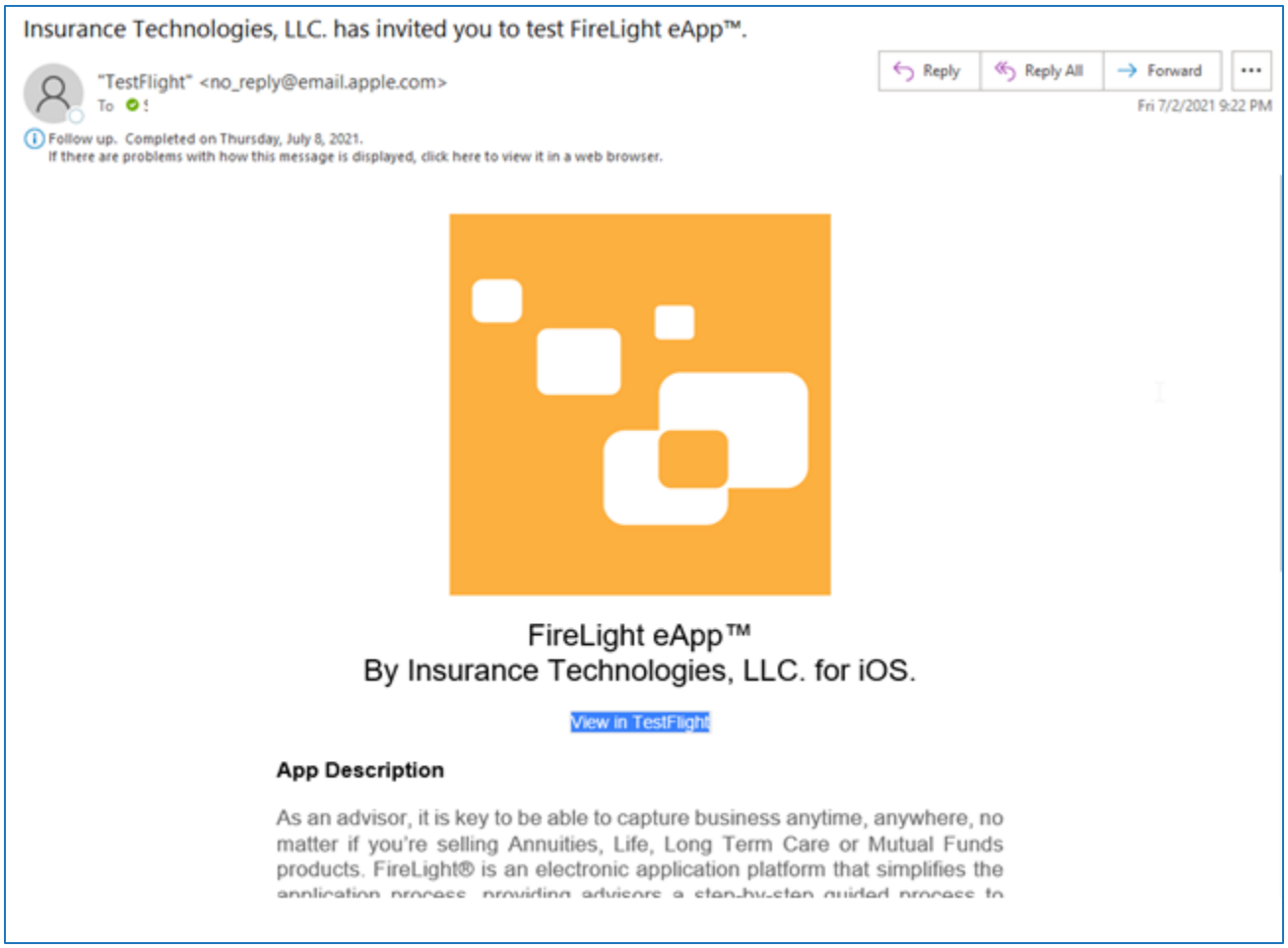
Use TestFlight to Test the “Beta” eApp for iPad

NOTE: Using TestFlight allows users to test eApp for iPad in the UAT environment before it is released to the App Store. Only invited users with an Apple ID can use the “Beta” App. Contact your FireLight PM or SRM to request access.

1. Download the TestFlight app from the App Store.
2. Login to TestFlight using an Apple ID. If an Apple ID needs to be created see: https://appleid.apple.com/
3. Accept the email invitation by clicking the **View in TestFlight** link. It will display a code needed to use in TestFlight.



4. Open TestFlight and click the **Redeem** link at the top right corner. It will ask you for the code. Enter the code received in step 3.
5. After entering the code, the FireLight app appears. Install the FireLight app on the device.

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6. Once installation is completed (App icon should display on Device), log in to the FireLight application on the web. Go to **Preferences**. In the **Mobile Access** section, click or tap the **Add New Device** button to get an Access PIN.
7. Go back to the iPad device. Open the FireLight eApp. Enter the **Access PIN** and a **Device Name** and click **Continue**. Set up the eApp for iPad password and the app is available for use.

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