23 August 2011

To: Users of The Broker's Workstation and/or The Underwriter's Workstation

Dear Valued Client:

Re: The Broker's Workstation and The Underwriter's Workstation – Important Releases and Changes – Help Feature Update

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancement to **The Broker's Workstation (TBW)** and **the Underwriter's Workstation (TUW)**:
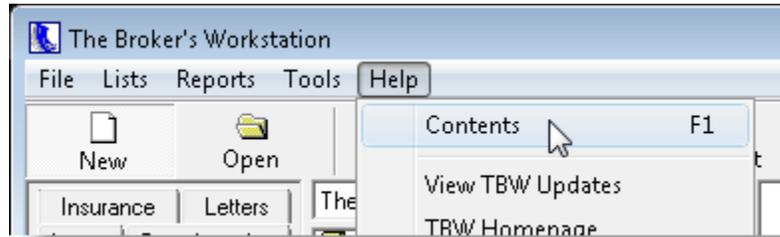
Contents

1. Ongoing Update of Help Feature

The inbuilt Help feature in TBW/TUW is in the process of being updated. While certain topics are not updated or available yet, many topics have been updated with current information about and instructions for working with the program.

To access the updated Help feature, simply click **Help**, **Contents** in the TBW/TUW window (see Figure 1.1). When the TBW/TUW window is open and active, clicking the **F1 key** on your computer keyboard will also launch the Help feature.
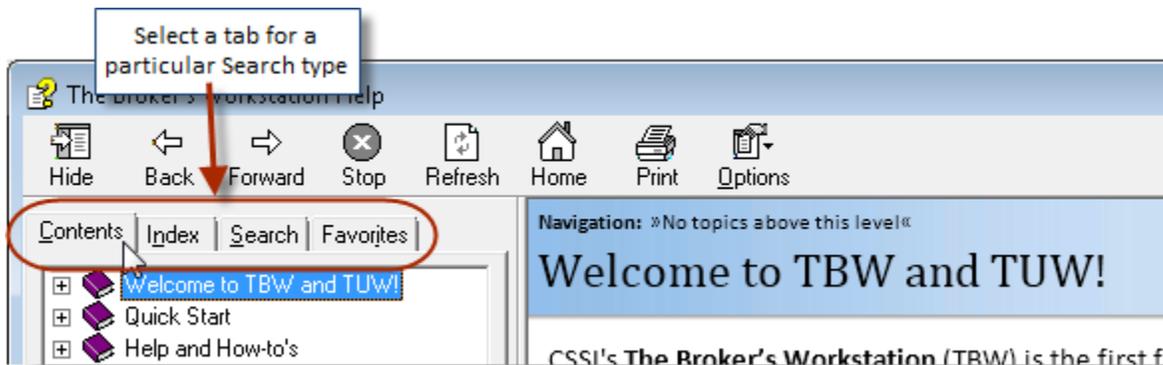
(Figure 1.1)

The Help feature will open in its own window, which can be moved, resized, etc., as with any window. Once opened, the Help window can be minimized or moved to the side as necessary while you complete various TBW/TUW or other tasks.
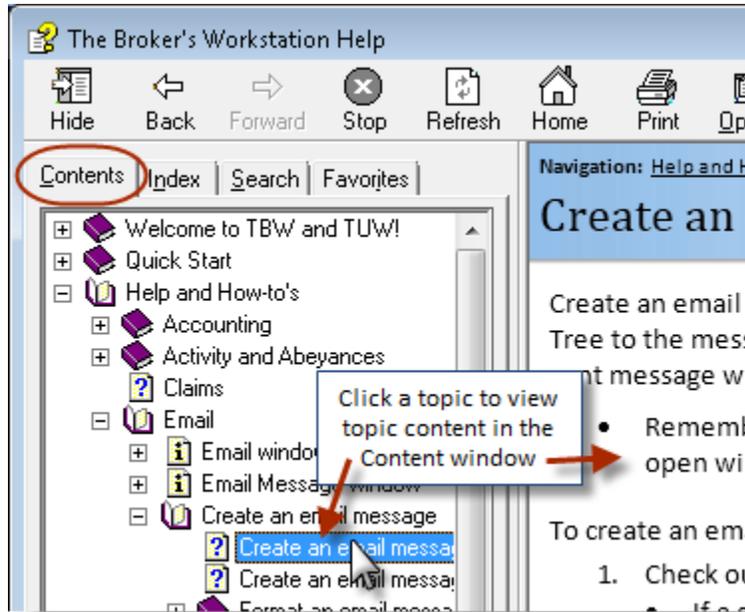
Four tabs are provided in the Help window to assist you with accessing Help content – the **Contents**, **Index**, **Search**, and **Favorites** tabs (see Figure 1.2).

(Figure 1.2)

The **Contents tab** contains a menu of informational and help topics. Click the **plus (+) sign** beside a category heading to display topics within that category, and click any topic to view that content in the Content window (see Figure 1.3).
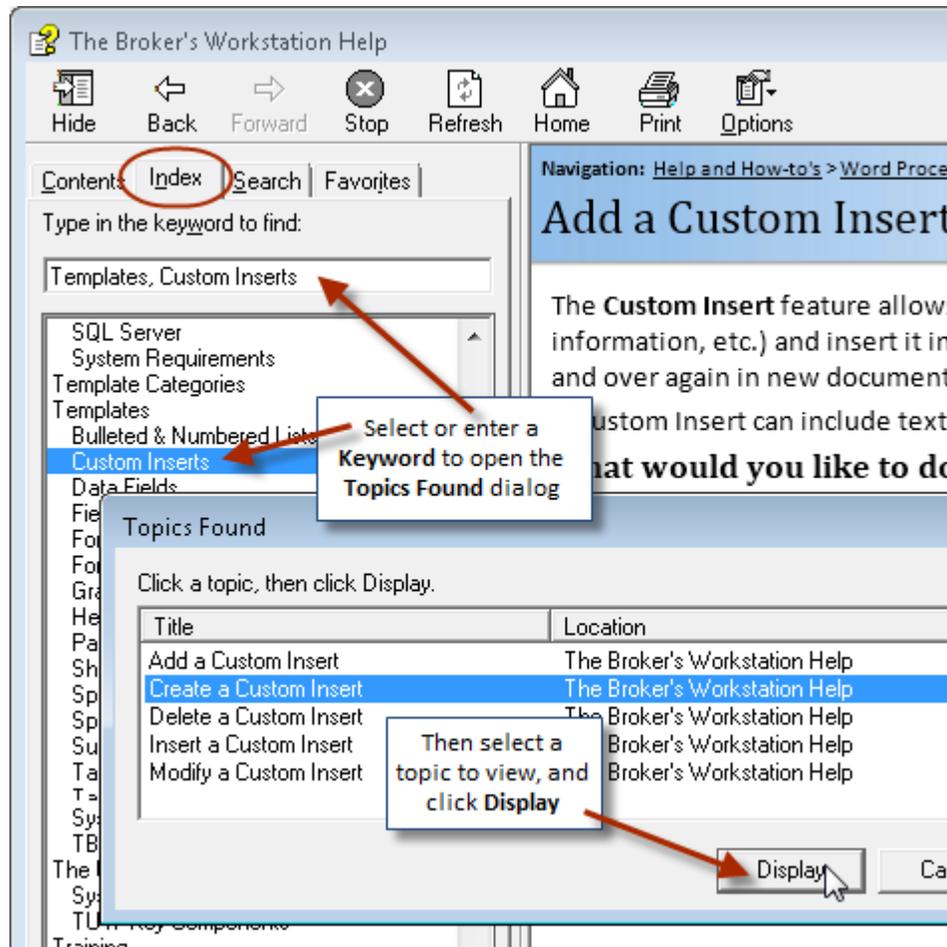
(Figure 1.3)

The **Index tab** provides a list of Help keywords. Either select a keyword in the list *or* enter a word or phrase in the Keyword box, and then click the **Display** button to view topics related to the keyword.
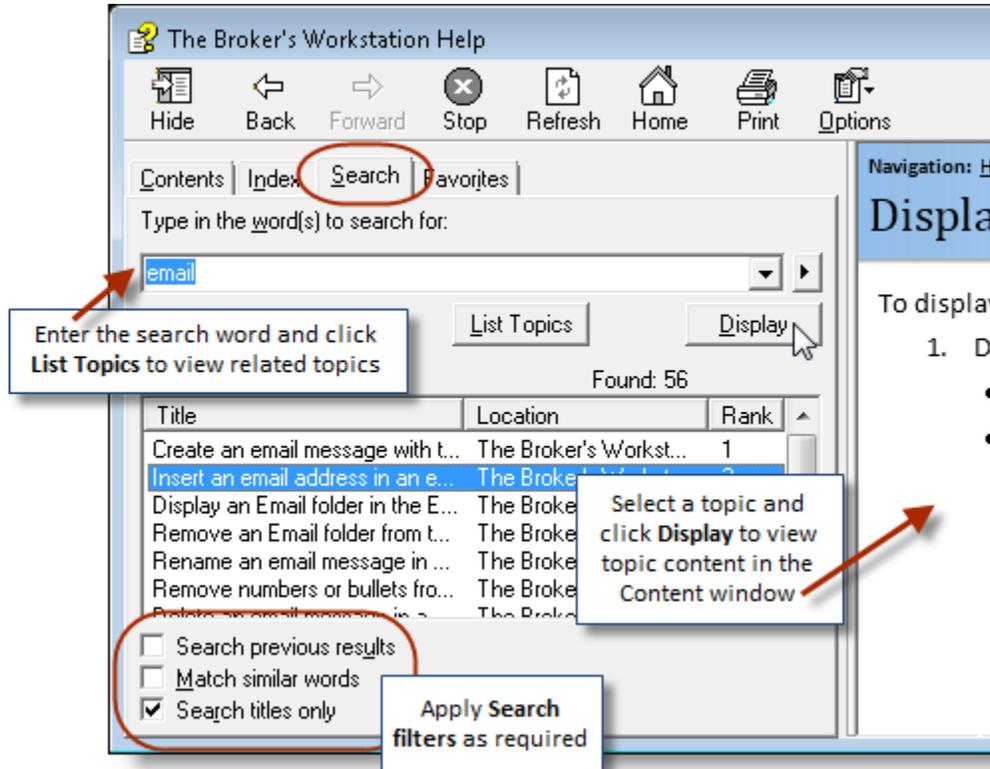
- If only one relevant topic is found, it will display immediately in the Content window.
- If multiple relevant topics are found, the **Topics Found** dialog will open, displaying a list of all content related to the keyword. Select a topic in the **Topics Found** dialog and click the **Display** button to view that content in the Content window (see Figure 1.4).

(Figure 1.4)

On the **Search tab**, enter a word or phrase to search for in the Help file, apply search filters as desired, and then click the **List Topics** button to view a list of relevant topics. Select a topic and click the **Display** button to view that topic in the Content window (see Figure 1.5).
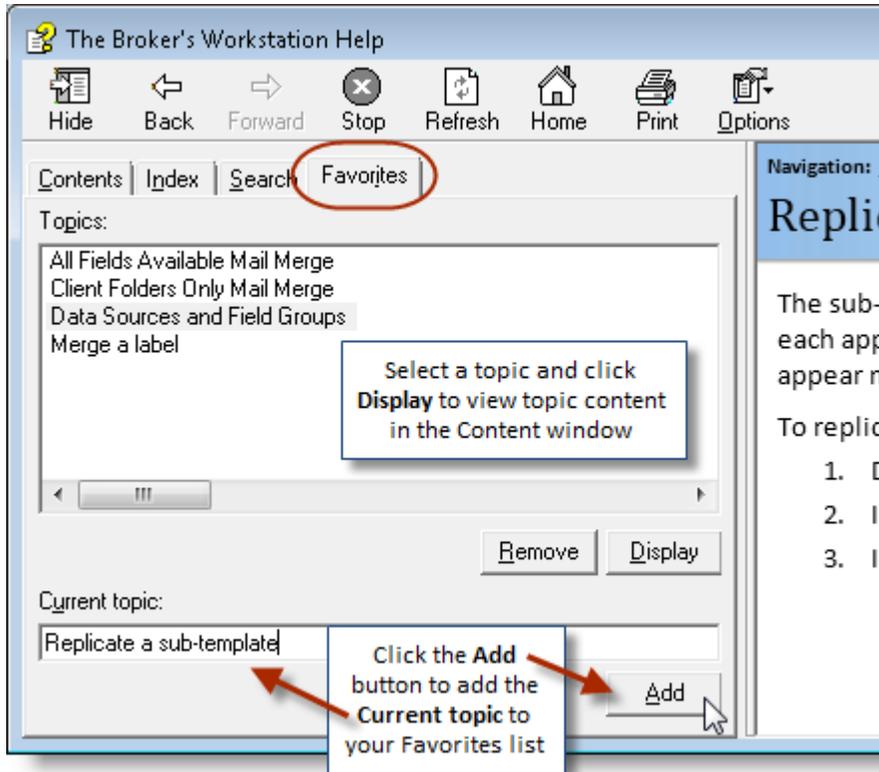
(Figure 1.5)

The **Favorites tab** will contain Help topics that you access regularly and have added to your Favorites list. To add a topic to your Favorites list, be sure it is displayed in the Content window (use one of the other tabs – Content, Index, or Search – to find the topic). Then, click the **Favorites** tab, and confirm the topic title is visible in the **Current topic** box. Click the **Add** button, and the topic will be added to the list of Favorites (see Figure 1.6). To view a topic in the Favorites list, simply select the topic and click the **Display** button, and the topic will appear in the Content window.

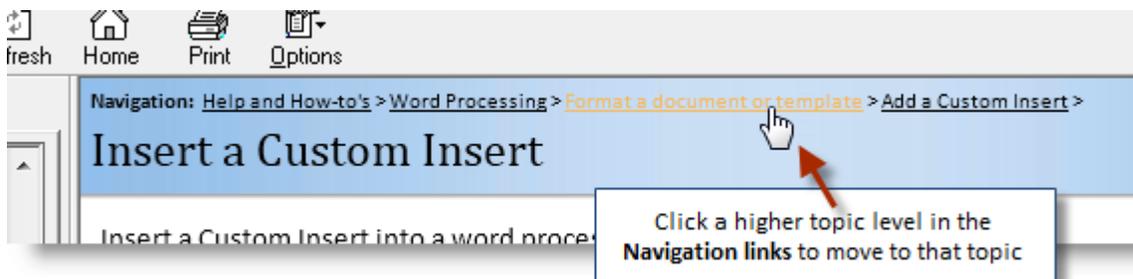- To remove a topic from the list, select the topic and click the **Remove** button.

(Figure 1.6)

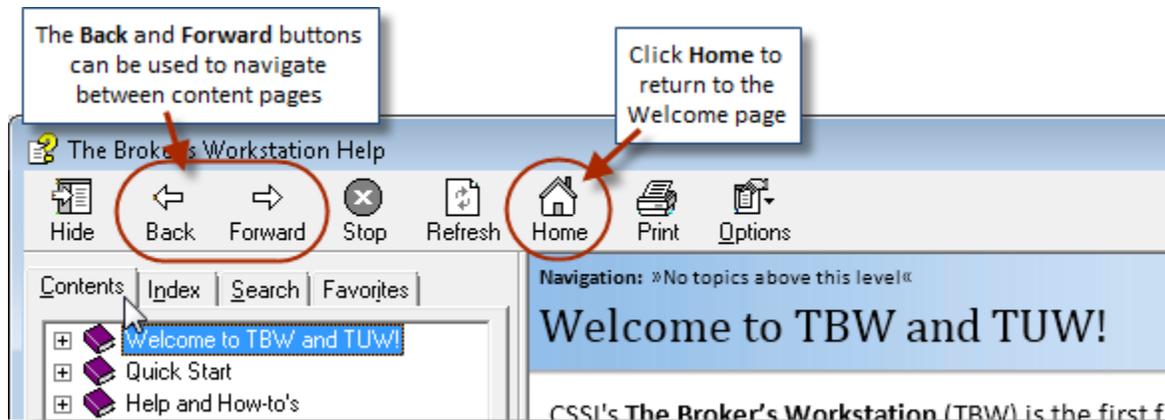Please note the following when working in the Help window:

- In addition to using the Tabs pane, you can also navigate through Help topics with the **Navigation links** at the top of the Content window. Click a higher topic level to move to that topic (see Figure 1.7).
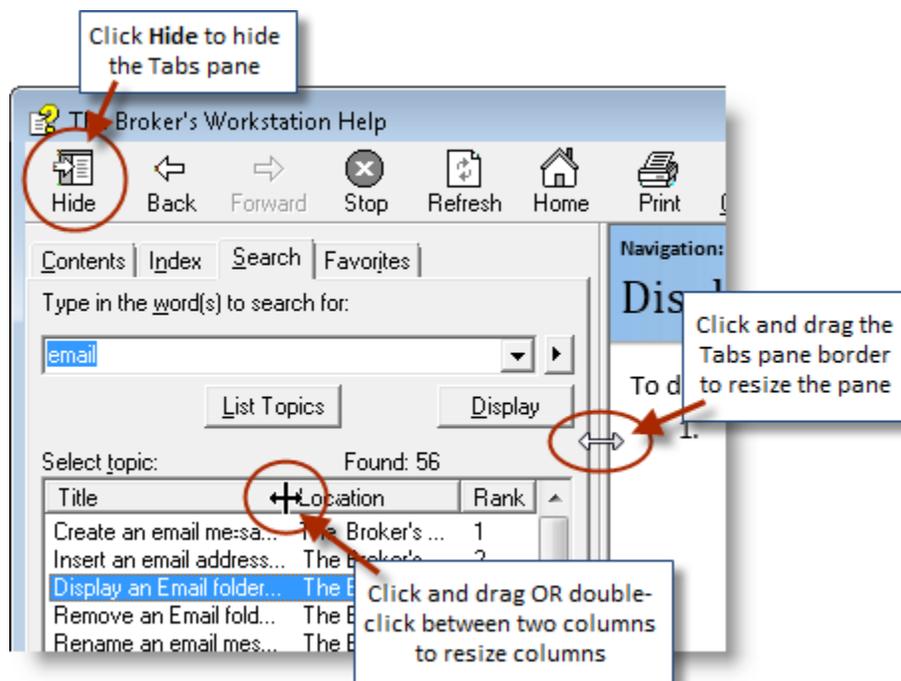
(Figure 1.7)

- The **Help toolbar buttons** can also be used to move between content pages (see Figure 1.8).

(Figure 1.8)

- The Tabs pane can be hidden from view, if necessary, using the **Hide** button on the Help toolbar (click the **Show** button to display the Tabs pane again). The Tabs pane can be resized as required, and the width of the columns in the Tabs pane can also be adjusted (see Figure 1.9).

(Figure 1.9)

To access the updated Help feature, please run the Update Utility. Please note that development of the Help feature is ongoing, and additional topics will be added/updated on a regular basis.

Please share this information with the appropriate TBW and TUW users in your office(s). Once you have reviewed this document, if you have any questions regarding this feature or need further assistance in its usage, please contact our Client Services Team at 1-888-291-3588 (toll-free telephone) or **clientservices@cssionline.com** (email).

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.

Microsoft
C E R T I F I E D
Partner