insite20twenty^{SM} looks different from the old platform, so we created this guide to help you minimize the learning curve.

CREATE A WORK-UP

1. To create a work-up, select the company using the left-hand menu.
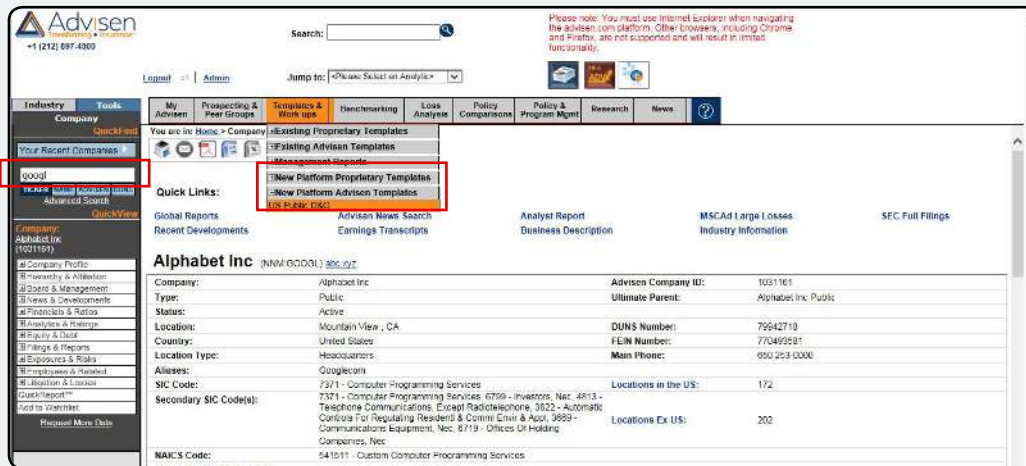
2. Go to the **Templates & Work-ups** tab and click **New Platform Proprietary Templates** or **New Platform Advisen Templates**.
3. Click the Underwriting Framework you'd like to use.
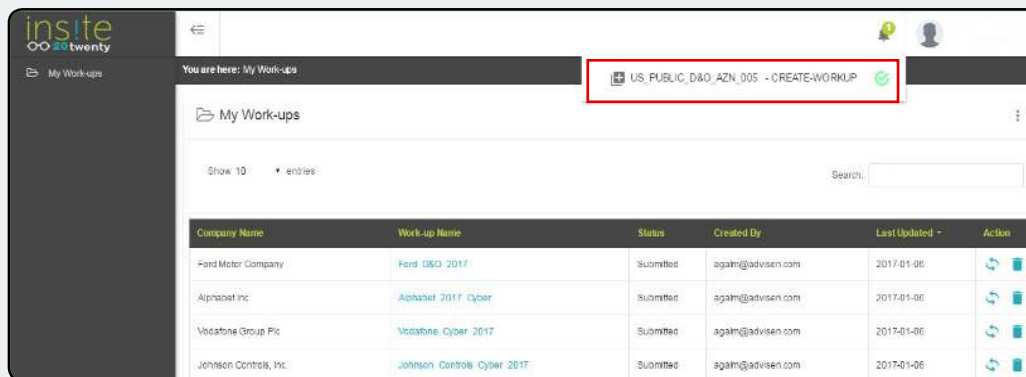
4. The work-up will load in the new Underwriting Framework system, which will appear in a new window.
5. Track the work-up creation progress in the notification area.
6. When the work-up is complete, click on the work-up name within the notification window.
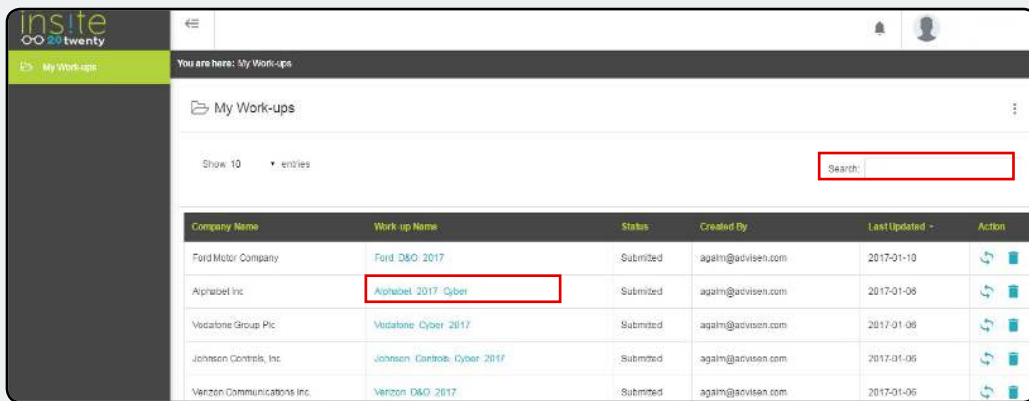
EDIT WORK-UP

1. To edit an existing work-up, go to the **Templates & Work-ups** tab and click **My Work-ups**. This will open a new window.
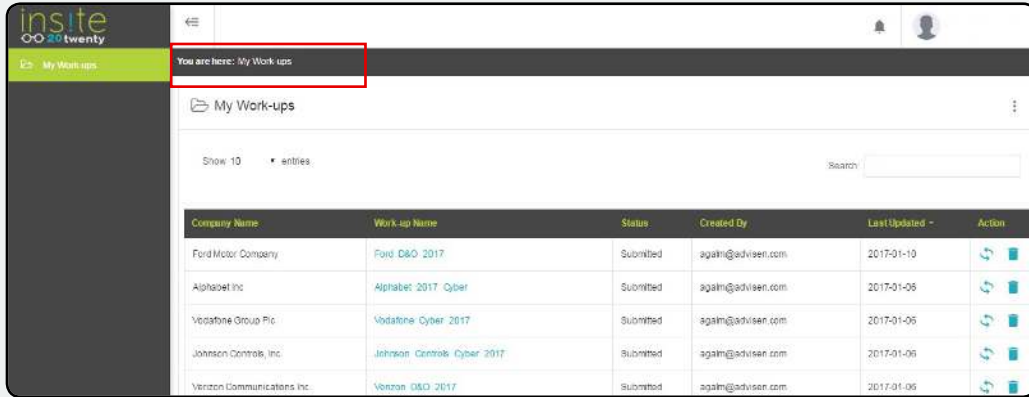
2. The work-ups listed are those that you are permissioned to view. Click **Reload** from the action menu to refresh this list of work-ups.


3. Click the work-up you'd like to edit. (If the work-up is highlighted in yellow, it is currently being edited and cannot be opened for further editing.)

4. If you don't see the work-up on the list, use the **Search** field (highlighted in red above) to search on any of the available columns.
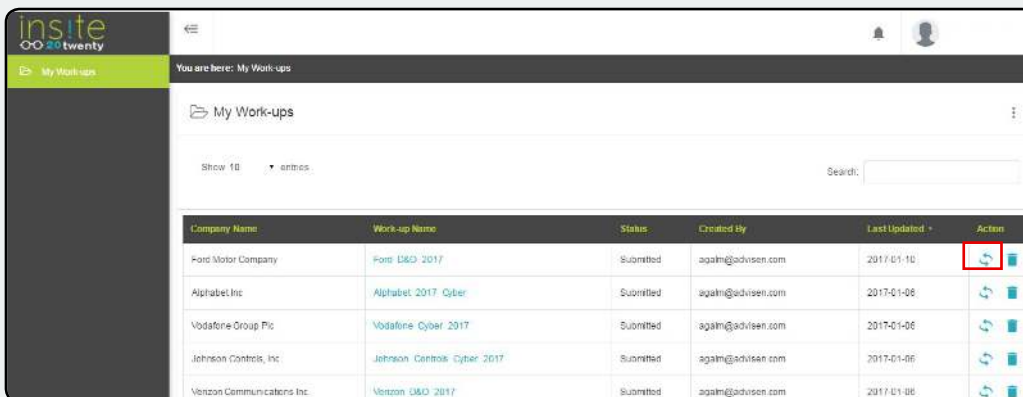
DOWNLOAD TO PDF

1. Select a work-up from **My Work-ups** list.
2. Go to **Work-up Overview**.
3. Click on **PDF Download** button from the action menu.
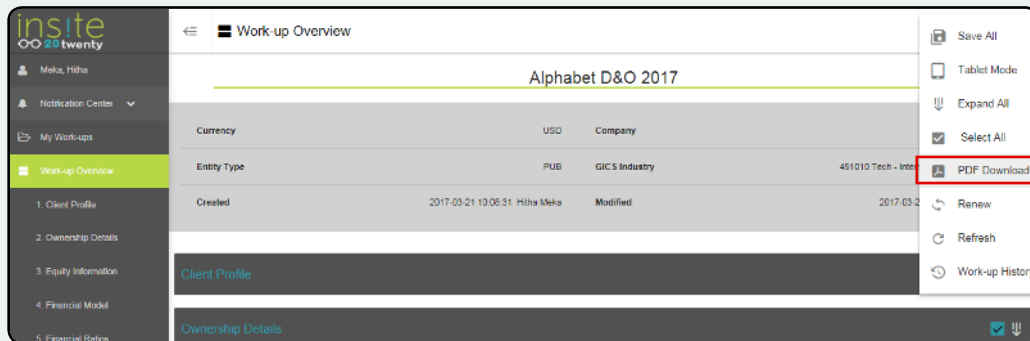
4. Track the PDF creation process in the notification box.
5. When the PDF is complete, click on the work-up name within the notification window.

RENEW A WORK-UP

1. From the insite20twenty window, go to **My Work-ups.**
2. Use the search field to find the work-up to be renewed.
3. Click on **Renew** (↻) to the right of the work-up name.
4. Track the work-up renewal progress in the notification area.
5. When the renewal is complete, click on the work-up name within the notification window.

REFRESH A WORK-UP

1. Select a work-up from **My Work-ups** list.
2. Go to **Work-up Overview**.
3. Click on **Refresh** button from the action menu.
4. Track the work-up refresh progress in the notification area.
5. When the refresh is complete, click on the work-up name within the notification window.
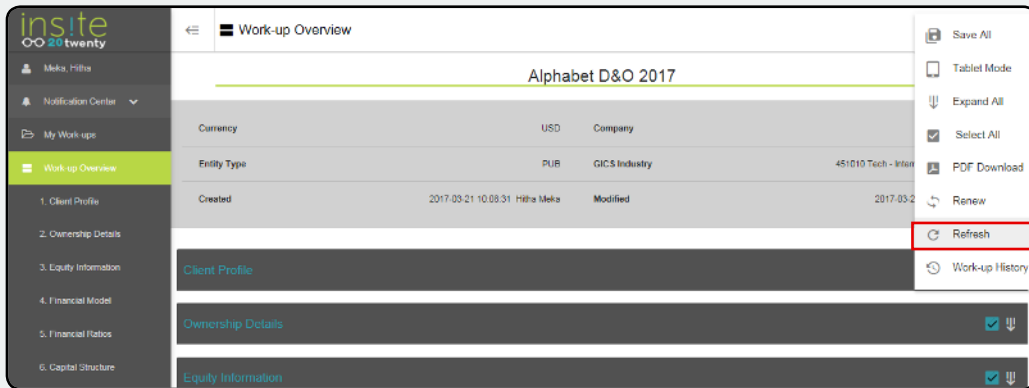
DELETE A WORK-UP

1. From the insite20twenty window, go to **My Work-ups**.
2. Click on **Delete** (   ) to the right of the work-up name.
3. Confirm you want the work-up deleted by clicking **"Yes"** in the confirmation window.
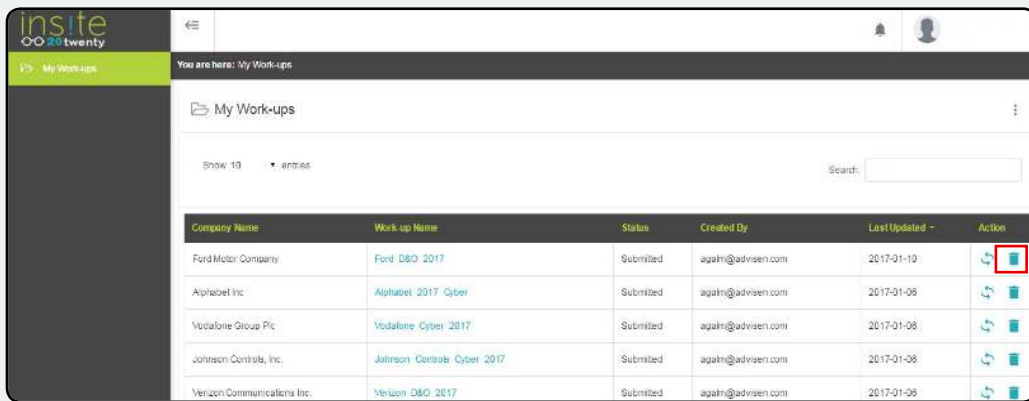
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