

ORIGAMI RISK

April 2022

Client Release Notes

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Claims/Incidents

Claims

Locations Lookup on Claim Forms

Currently, it is not possible to attach a location to a claim if the Location Inactive Date is populated regardless of what date the location was inactive. Origami will now allow this functionality.

If a Loss Date is set and the Location Lookup is clicked on a new or edited claim, then the current Loss Date will be passed (whatever is set on the screen, not what is saved in the database – i.e., change Loss Date but don't save, applies Location Lookup with Loss Date populated on the web page on Location Lookup click). The default locations displayed when opening a Location lookup on a new/edited claim will be 'Active for Claim' – meaning Locations with (Active Date <= Loss Date AND an (Inactive Date >= Loss Date || No Inactive Date)). If there is no Loss when the Location Lookup is selected, all locations will be provided by default.

CMS

Additional CMS Query Response Fields Added to CMS Reports

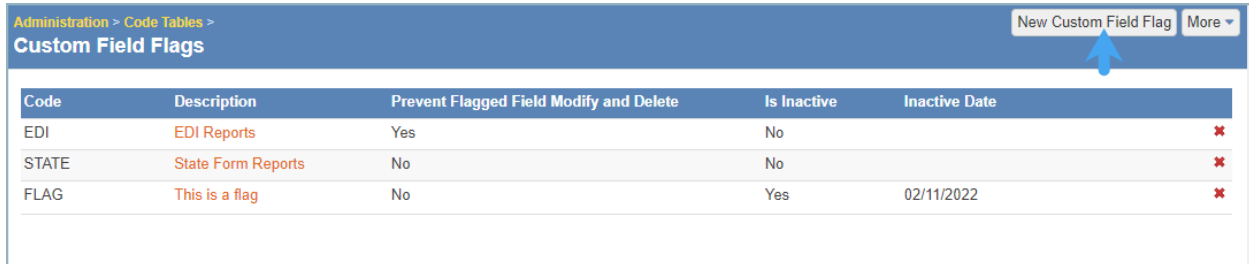
Origami has added the Part C and Part D fields from the Query Response File to the CMS Report.

EDI

Ability to Identify Fields Used for EDI/State Forms

In this release, Origami has added a Custom Field Flag Code index table to create custom flags or fields.

On the following screen, you can create custom flags to assign to fields.



Code	Description	Prevent Flagged Field Modify and Delete	Is Inactive	Inactive Date
EDI	EDI Reports	Yes	No	*
STATE	State Form Reports	No	No	*
FLAG	This is a flag	No	Yes	02/11/2022

When adding a new field, you have the option to select a flag to assign.

Add a New Field

✔ Successfully added the field Creed Hours [CustomText2]

Follow the steps below to add a custom field to the system. You will be limited to using available custom fields for the area you have chosen.

Select the Area *
 Training or Certification Type

Select the Type of Field *
 Text (28 remaining)

What type of data does this field contain?
 Default

Enter a minimum allowed field length. If empty there will be no minimum length constraint.

Enter a maximum allowed field length. If empty the database field length will be used.

Type in a name for the field: *
 Credit






Should the field be required? *
 Yes No

Add field at the account level?
 Yes No

Assign Flag?

- EDI Reports
- State Form Reports

The flag will display on the Fields index page for flagged fields and the custom field flag code's description on hover.

Type	
Training or Certification Type	Credit Hours   
	<input type="text" value="EDI Reports"/>
Check	Additional Payee  

The **Delete** button is hidden and prevented if the flag has Prevent Edit Delete is set to "true."

General/Admin

Contract Management

Support for Form Groups Added for Document Controls Domain

Origami has added support for form groups to the Document Controls domain. The form group is keyed off the Document Control Type ID which is the ID of a record in the new Document Control Types table. This field is optional on a document control record.

Document Control Types Table

Form	View Mode	Edit Mode
Document Controls		
Default for Document Controls	New Form	New Form
Document Control Type: Contracts	New Form	New Form
Document Control Type: Policies And Procedures	New Form	New Form
Published Documents		
Default for Published Documents	New Form	New Form

The following screenshot is an example where a custom edit form exists and where content will be rendered:

In addition, an intermediary document control type picker screen has been added that will display before creating a new document control if active records exist in the Document Control Types table.

Data Entry Events

Data Entry Event Enhancement

Users will now have the ability to store information from Severe Weather Alerts and Additional Alert Feeds into a new domain table and to enable data entry events off of this domain.

External Events Data Entry Event

Select Event Area

- Expense Reports
- External Events
- Failed Emails

New Data Entry Event

Data Entry Event Details

Area *

External Event

On Events *

- External Event is Added
- External Event is Edited
- External Event is Deleted

On Update of Fields

On edit, fire this event only when the selected fields are modified. Don't select any fields if event should fire on any edit.

- Alert Date UTC
- Alert Key
- Entry Content
- FIPS Codes
- Latitude
- Location
- Longitude
- Polygon
- Source

Use shift or ctrl to select multiple items

Condition

Location has a record where **Year Built** is less than **2010** [Edit Filters](#)

Triggered by User Condition

All Users [Edit Filters](#) [Test Filters](#)

- When editing, trigger this event only when the filter condition was previously not met, and after edit the filter is met.

Description *

External Event DEE

Comments

External Events Index Page

External Events			
Location	Title	Summary	Alert Date UTC
LOCA1 - Diversified Industries Inc	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB1C1 - New York	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB1C2 - Philadelphia	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB1C3 - Boston	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB1C4 - Baltimore	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB2C2 - Jacksonville	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB2C3 - Charlotte	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022
LOCB2C4 - Miami	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in	03/10/2022

Page 1 Next Results per page

NOTE: The new Service Queue Instance will be needed in order for this functionality to work.

QueueName
origami_externaleventmessages

External Event View

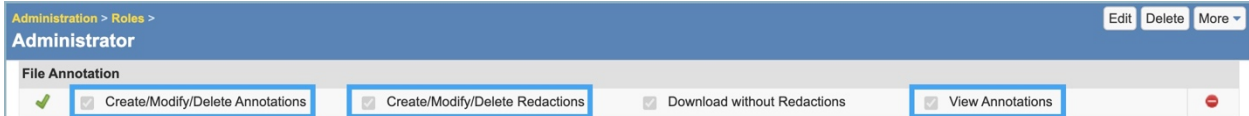
External Events > Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS	
Location	LOCA1 - Diversified Industries Inc
Title	Winter Storm Warning issued March 09 at 1:22PM AKST until March 11 at 6:00AM AKST by NWS
Summary	...WINTER STORM WARNING NOW IN EFFECT UNTIL 6 AM AKST FRIDAY... * WHAT...Heavy snow expected. Plan on difficult travel conditions. Total snow accumulations of 12 to 16 inches. * WHERE...Denali. * WHEN...Until 6 AM Friday. * ADDITIONAL DETAILS...Look for significant reductions in
Link	https://alerts.weather.gov/cap/wwacapget.php?x=AK1263E8693338.WinterStormWarning_1263E8769D80AK.AFGWSWAFG_a0eae8730cf9e8910d9534021bb3eae5
Event Type	Winter Storm Warning
Effective (Utc)	03/09/2022
Expires (Utc)	03/11/2022
Status	Actual
Category	Met
Urgency	Expected
Severity	Moderate
Certainty	Likely

File Attachments

Ability to Annotate on Files

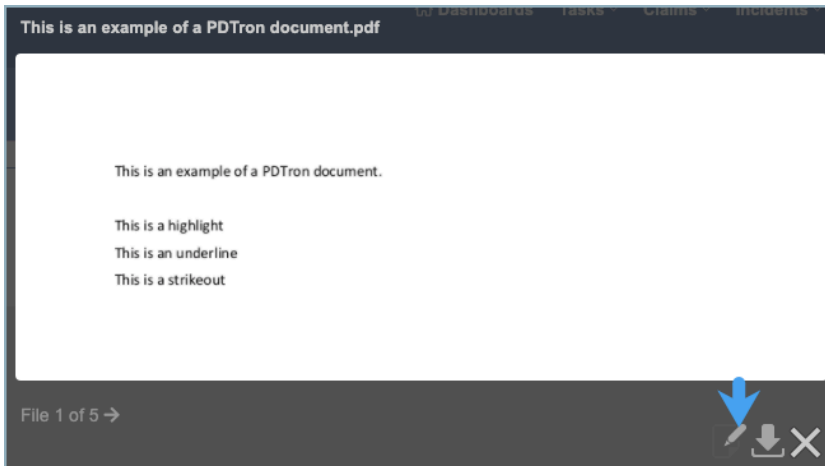
In this release, Origami has added the ability for users to add annotations and redactions to PDF files.

NOTE: This functionality must be enabled by your Service Representative and the user must have the following permissions.

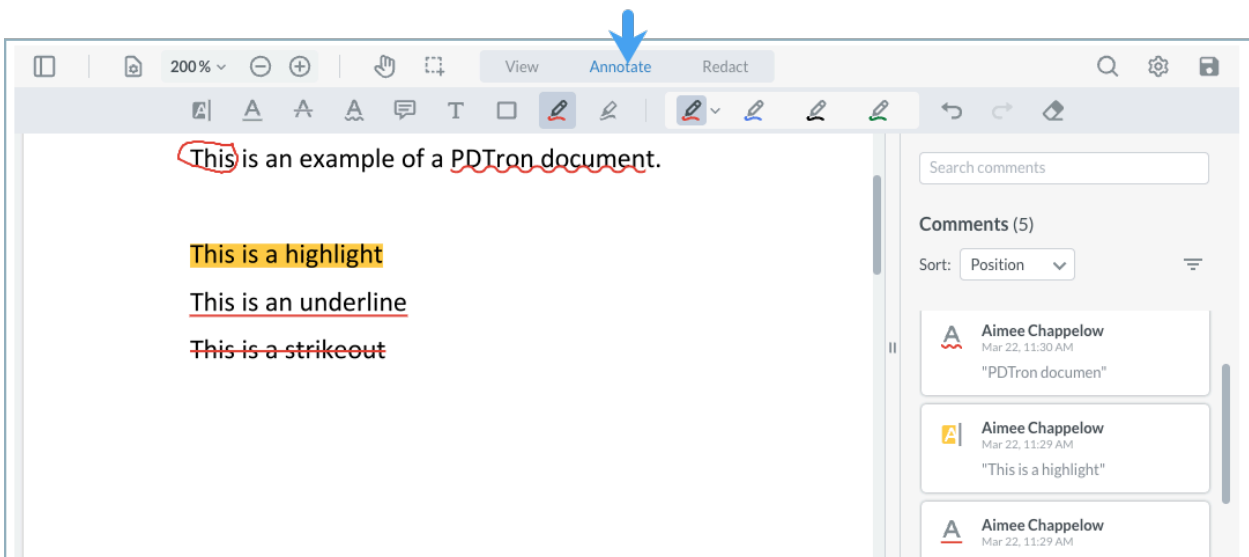


Annotations

Using the annotation feature, you can highlight, underline, strikethrough, free draw, or add free text. To use this functionality, open the file in edit mode.



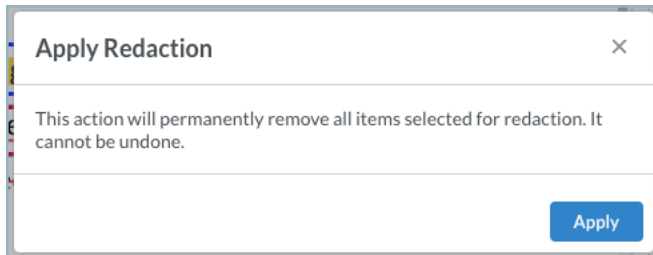
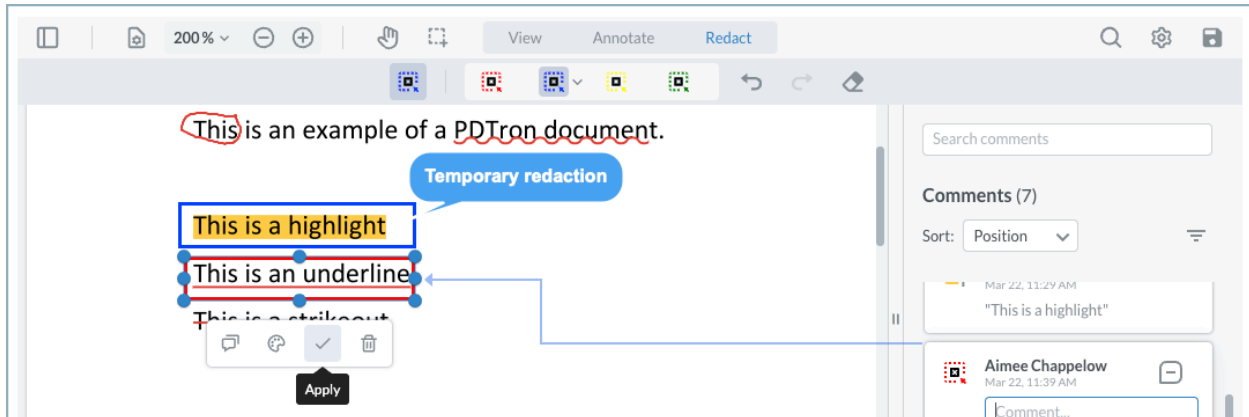
Click **Annotate**.



Redactions

Redactions function a bit differently in that there are two phases of applying redactions: temporary and permanent. When you create a redaction, it is a temporary redaction, which means you can delete it even after saving the document. Temporary redactions have a border around them.

To make a redaction permanent, click the border of the redaction and select “Apply.” Once the redaction is applied, it is permanent and cannot be deleted.



View Annotations

Only users with “View Annotations” permission can view annotations; however, they cannot modify the annotations.

If the user does not have “Create/Modify/Delete Annotations” and “View Annotations,” they will be unable to view any annotations on a pdf document. Even if the document is downloaded, the annotations will not display unless the user has the correct permissions.

Forms

Search Screen Configuration - Ability to Define Default Value on Filter By Dropdown Fields

Currently, there is no way to set a default value for a dropdown field (e.g., Policy - Status) on the Filter By. In this release, a new tag with syntax column name [Default Value = XYZ] where “XYZ” is the default to select in a dropdown filter by search field. For example, a custom-coded field may have something like “10001” for the “XYZ,” but the static could be “Active” (no quotes) for XYZ.

NOTE: This will not work on every domain because some have specifically overridden the dropdown behavior for search fields instead of using the core Origami dropdown functionality.

For help on how to use this functionality, consult the Forms/Screen Help documentation page.

← → ↻ staging.origamirisk.com/Origami/Forms/ScreenHelp

Help on Screen Configuration

Search Fields

Defines the fields that can be used to search.

Some search fields can be enhanced by adding tags to them. Here are the options available:

Label	Define the label that will be shown in the search UI for the field.	ColumnName[Label=Column Label]
DefaultValue	Choose a default value for drop-down search fields. NOTE: Some domains override the base search field behavior and a default value cannot be set.	ColumnName[DefaultValue=Active] ColumnName[DefaultValue=10003]

Global Search

Ability to Search All Domains

It is now possible to set “All” as the default on the Global Search drop-down, allowing the user to search all domains and not just the domain that they are currently viewing.

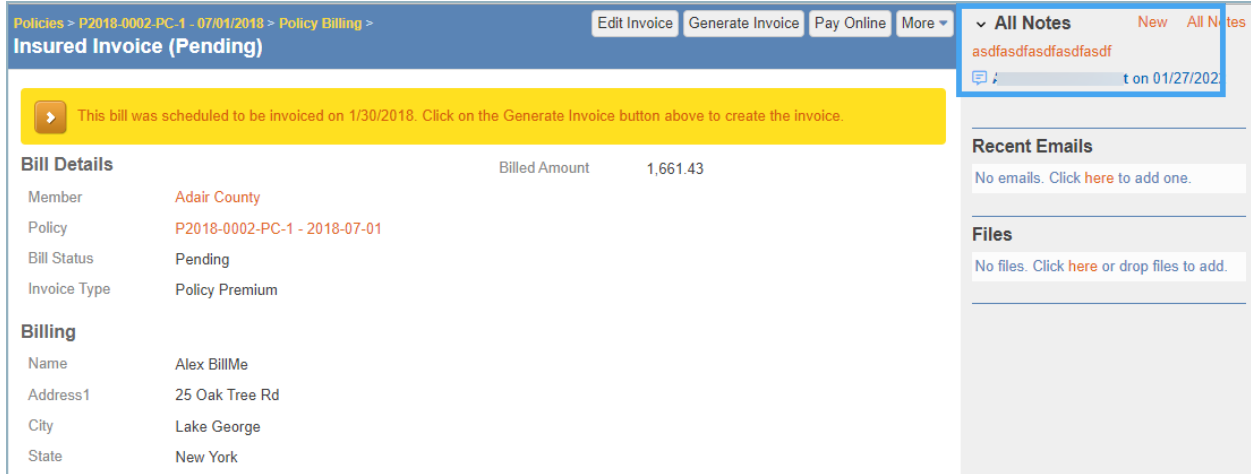
NOTE: This functionality must be enabled by your Service Representative.

The screenshot displays the Origami Risk web application interface. At the top, there is a navigation bar with various menu items like 'Dashboards', 'Claims', 'Incidents', etc. Below this, a search bar is visible with the dropdown menu set to 'All'. The main content area shows a list of emails with columns for 'From / To', 'Subject', and 'Parent'. The 'From / To' column lists various email addresses, including those from 'origamirisk.com' and 'gmail.com'. The 'Subject' column shows subjects like 'test', 'This is the initial email', and 'Property Request Acknowledgement - New Location Number 209'. The 'Parent' column shows links to specific claims or tasks. On the right side, there is a 'Quick Filters' panel with options like 'My Emails', 'Starred', and 'Has Send Failures'. Below that, there is a 'Filter By' section with dropdown menus for 'Direction', 'Status', and 'Content'. At the bottom right, there is a 'Search' button and a 'Results per page' selector.

Notes

Ability to Add Notes to Member Transactions

It is now possible to add notes to Member Transactions.



Insured Invoice (Pending)

Notification: This bill was scheduled to be invoiced on 1/30/2018. Click on the Generate Invoice button above to create the invoice.

Bill Details		Billed Amount	1,661.43
Member	Adair County		
Policy	P2018-0002-PC-1 - 2018-07-01		
Bill Status	Pending		
Invoice Type	Policy Premium		

Billing

Name	Alex BillMe
Address1	25 Oak Tree Rd
City	Lake George
State	New York

Notes: All Notes, New, All Notes, asdfasdfasdfasdfasdf, t on 01/27/202

Recent Emails: No emails. Click [here](#) to add one.

Files: No files. Click [here](#) or drop files to add.

Governance, Risk, and Compliance (GRC)

BCM

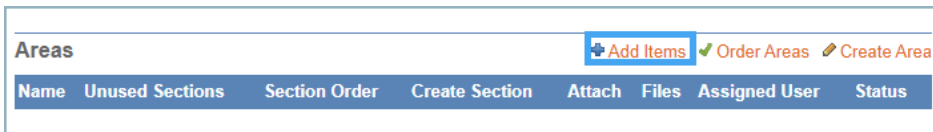
BCM Doc Template - Label Updates

The Elements grid label “Last Modified” has been changed to “Last Reviewed” and “Modified User” has been changed to “Reviewed By.”

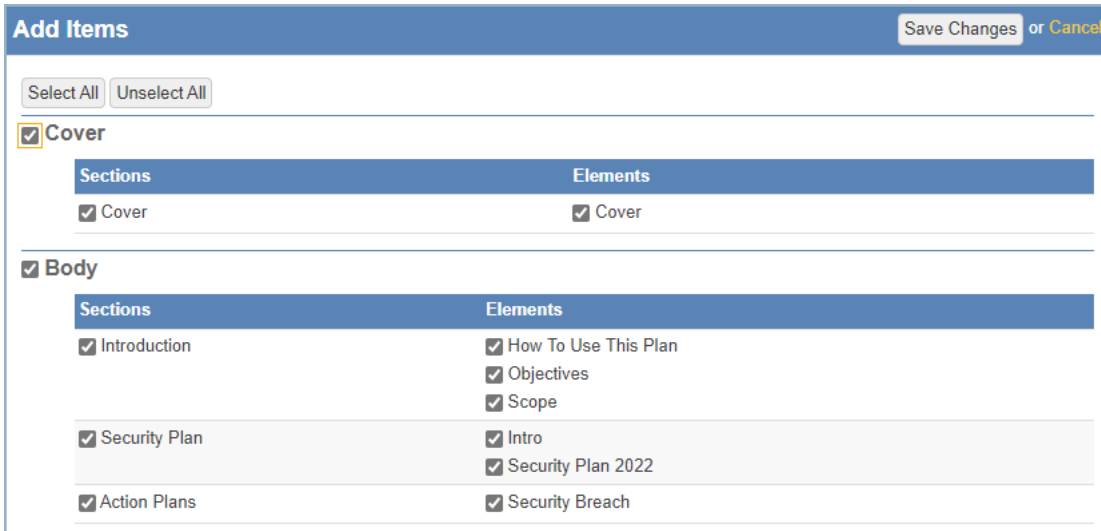
BCM Plan Template Setup UX Enhancements

Currently, you can set up individual areas and then elements one at a time for BCM templates. If you have many of reach, this process can be very time-consuming. To help alleviate this issue, Origami has made UI enhancements.

On a Document Template view page, the “+ Add Area” link above the Area grid has been replaced with “Add Items.”



On the Add Items screen, users can now add multiple areas, sections, and elements to the document template.



General

Parent/Child Relationships Added to File Folders

A new link has been added to each row of the File Folder view to allow adding a child folder to the specific folder.

Name ▲	Description	Is Inactive	Inactive Date	Domains	Major Coverages	Include Unlinked	Parent Folder	
CITATIONS	Tickets, Fines, Fees	No				No	LEGAL	Add Child Folder ✖
CLAIM	General Claim Files & Attachments	No		Claim, Incident		No		Add Child Folder ✖
EHS	Environmental Health and Safety Files and Attachments	Yes	03/01/2022			No		Add Child Folder ✖
EMAIL	Emailed Attachment							Add Child Folder ✖
FLEET	Fleet Files and Attachments							Add Child Folder ✖
LAWYER		No				No	LEGAL	Add Child Folder ✖
LEGAL	Legal Files and Attachments							Add Child Folder ✖
MEDICAL	Medical Files & Attachments	No			Hospital Professional Liability, Workers Compensation	No		Add Child Folder ✖
POLICY	Policy Files and Attachments	No		Policy, Policy Certificate		No		Add Child Folder ✖
RENEWAL	Renewal Files and Attachments							Add Child Folder ✖
SAFETY	Safety Files and Attachments							Add Child Folder ✖

A child folder will have the **Is Inactive**, **Domains**, **Major Coverages**, and **Include Unlinked** options defaulted to whatever is set on the parent folder.

New File Folder

New File Folder

Parent Folder: MEDICAL

Name *

Description

Domains

Major Coverages

- Auto
- Aviation
- General Liability
- Hospital Professional Liability
- Management Liability
- Marine
- Professional Liability
- Property
- Workers Compensation

Inactive Check if code is deactivated

Saving the child folder will show the name of the Parent Folder in the folder grid. Multiple levels of children can be added by adding a new child to an existing child folder.

A Filter By section has also been added that gives the ability to search by parent folder.

Filter By

Name

Domains

Major Coverages

Include Unlinked

Parent Folder

“View All” and “Last” Added to Each Domain Page

First/Last navigation options have been added to the Index pages of GRC domains.

21 to 40 of 170 Page of 9 [First](#) [Prev](#) [Next](#) [Last](#)

Links will be enabled only for views that have ‘Display Count’ enabled.

Save the current view

Type	Claim
Name *	<input type="text"/>
Shared *	<input type="text" value="Private"/>
Display Count	<input type="checkbox"/>

Survey Management

Icon Added for Resending Email

An email icon has been added to the right of the URL on the Survey Assignments views for non-completed and non-pending statuses. Clicking the email icon will resend the “activation” email to the current assignee, which includes the URL for the survey.

Surveys > Risk and Asset Survey > Survey Assignments > Assignment: [redacted]@origamirisk.com

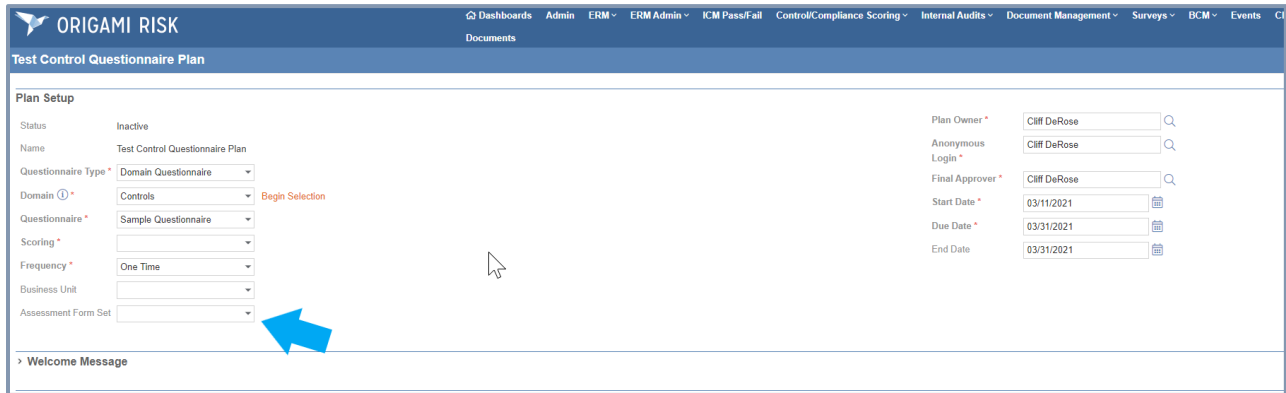
▶ Email with URL successfully resent for assignee.

Start Date	01/01/2019
End Date	12/31/2020
Excluded Tags	Fleet,Risks
Status	Active
Is Anonymous	Yes
User Email	[redacted]@origamirisk.com
User Name	Christian
Url Link	https://staging.origamirisk.com/Origami/SurveyIntake/Direct?token=Cmg6andthL1MMJUrdrvcQ4A1YVAksglq49ooD1layJTFg0FzDsYTv6vQKAN1M9QhombzK8Z7nWY7Xp6JLAf%2f3U%2bG8%2bnuls9eowspacyc3w5tgWRtfxRco%2fYac8g [img alt="email icon" data-bbox="855 845 875 865"/>

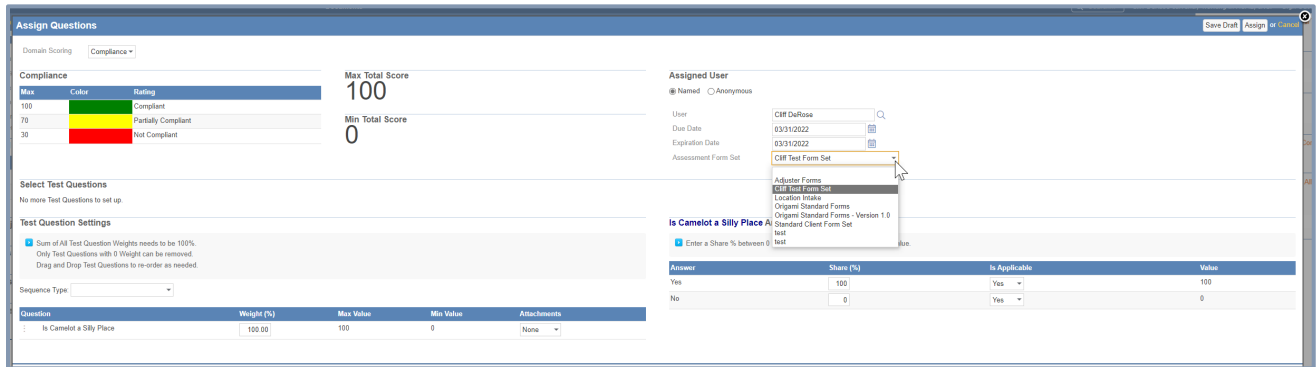
Questionnaire

Ability to Set Custom Assessment Form in Questionnaires and Test Questions


Origami has added the ability to select a governance form from another form set in Questionnaires and Test Questions. For Questionnaire Plans, the custom **Assessment Form Set** drop-down was added to the Questionnaire Plan edit screen.



The custom **Assessment Form Set** drop-down was added to the **Assigned User** section for **Assign Questions** directly from a domain entity.



An example of the view form using a custom Assessment Form Set for the governance being assessed is shown below:

**ORIGAMI RISK**

Governance Scoring: Governance 1 (Page 1 of 1)

▼ **Governance Details**

Status	Active
Name	Governance 1
Number	PH-GOV-00001
Current Compliance Percent	0.00

User	Cliff DeRose
Due Date	3/31/2022

Is Camelot a Silly Place *

Yes No [Clear](#)

If no custom assessment form set is specified, either on a questionnaire plan or a one-off assessment (e.g., assign questions), then whatever the current user's current form set is will be utilized.

Healthcare

Transactions

Expanded Check Payments and Transactions to Hold 12 ICD-9 Diagnosis Codes

The prior HCFA form only allowed four ICD-9 diagnosis codes and their references. The new HCFA form allows 12. Therefore, ICD-9 diagnosis codes 5-12 have been added to capture all twelve coming back from Medical Bill Review vendors.

Pools/Carriers

Agency Information

Ability to Lookup Agency Information by Agent

Currently, the Agency must be selected first, followed by the Agent to lookup Agency information. To allow for the child dependency, like Agent, to be selected first, add the allow **Child Dependency First** field property to the field's XML similar to the example below:

```
<field name="Agent" allowChildDependencyFirst="true" />
```

Agency Information

Agent

Agency *

Policy Details

Policy Type *

Agency Bill

Ability to Generate Bill Statements Manually if Auto Generate Agency Statements Are Turned Off

Currently, there is no way to manually generate an agency statement for a broker. If the rating is set to use agency statements, but the Auto Generate Agency Invoice is flagged 'false,' there is no way to generate an agency statement. It is now possible to select brokers from the index page and to generate invoices for them.

Agencies						
Code	Description	NPN	Street1	City	State	
<input type="checkbox"/>	ALLIANT					Alliant Insurance Services Inc.
<input checked="" type="checkbox"/>	AON					AON
<input checked="" type="checkbox"/>	GALLAGHR		89 Corporate Row	Chicago	Illinois	Arthur J. Gallagher
<input type="checkbox"/>	BBT					BB&T Insurance Services Inc.
<input type="checkbox"/>	BOLL					Bollinger Inc.
<input type="checkbox"/>	BAB					Brown & Brown
<input type="checkbox"/>	CBIZ					CBIZ Benefits & Insurance Services Inc.

Generate Agency Invoices						
Code	Description	NPN	Street1	City	State	
AON	AON					
GALLAGHR	Arthur J. Gallagher		89 Corporate Row	Chicago	Illinois	

Calculate Commissions As Of *

or

Agencies New Agency More ▾						
▶ Generated 2 Agency Invoices.						
🔍 All Agencies Edit Criteria Edit Columns						
<input type="checkbox"/>	Code	Description ▲	NPN	Street1	City	State
<input type="checkbox"/>	ALLIANT	Alliant Insurance Services Inc.				
<input type="checkbox"/>	AON	AON				
<input type="checkbox"/>	GALLAGHR	Arthur J. Gallagher		89 Corporate Row	Chicago	Illinois
<input type="checkbox"/>	BBT	BB&T Insurance Services Inc.				
<input type="checkbox"/>	BOLL	Bollinger Inc.				
<input type="checkbox"/>	BAB	Brown & Brown				

Policy Changes

Update to Policy Change Effective Dates

The following two new options have been added under the Rating program:

- Use Unified Endorsement Dates:** If selected, policy changes that are added to the endorsement will have their start dates updated to reflect the effective date of the endorsement. When a change is added to an endorsement, the start date will be populated with the effective date of the endorsement and if the user change and saves, the system will display a correct date prompt.
- Gapless Reinstatement:** If this option is selected when reinstating a change, the date will be filled out. If the date is changed and saved, the system will alert the user to the correct date.

Use Unified Endorsement Date Enable this if you would like your policy changes to be forced to be the same as dates set for the endorsement.

Gapless Reinstatement Enable this if you would like the reinstatement of a cancelled policy to use the cancel date as the effective date.

Endorsement Required
 One or more of the selected policy changes require the policy premium to be recalculated. There is no active endorsement record for this member policy, so one will need to be created. Click on the "Create Endorsement" button above to proceed.

Notice:
 The add dates of the changes will be updated to the date of the endorsement.

Premium Billing

Ability to Move Payment from One Member to Another

Origami has added the ability to move a payment from one member to another, accessible via a new menu entry when viewing payment records. The original payment is reversed after it is moved.

Insureds > All Insureds Billing > Fred Member > Insured Billing > Insured Payment

Insured Payment Details

Type	Payment
Member	Fred Member
Transaction Date	04/26/2018
Paid Amount	500.00
Payment Check Number	233

- Insured Transaction
 - Delete Insured Payment
- Audit Records
 - Insured Transaction Event Logs
- Downloads
 - Download File Attachments
- Forms and Letters
 - Forms and Mail Merge Letters
- Origami Employee
 - Show Panel Info
 - Show Record View
 - Test Form Tags
- Export
 - View QR Code
- Payment
 - Create Reverse Payment
 - Move Payment
- Setup
 - Show Form Definition

Insureds > All Insureds Billing > Fred Member > Insured Billing > Move Payment to Insured

This page is used to move an existing payment from one insured to another. Please select the insured to which this payment should be reassigned.

Select the Insured *

Reports & Dashboards

Dashboards

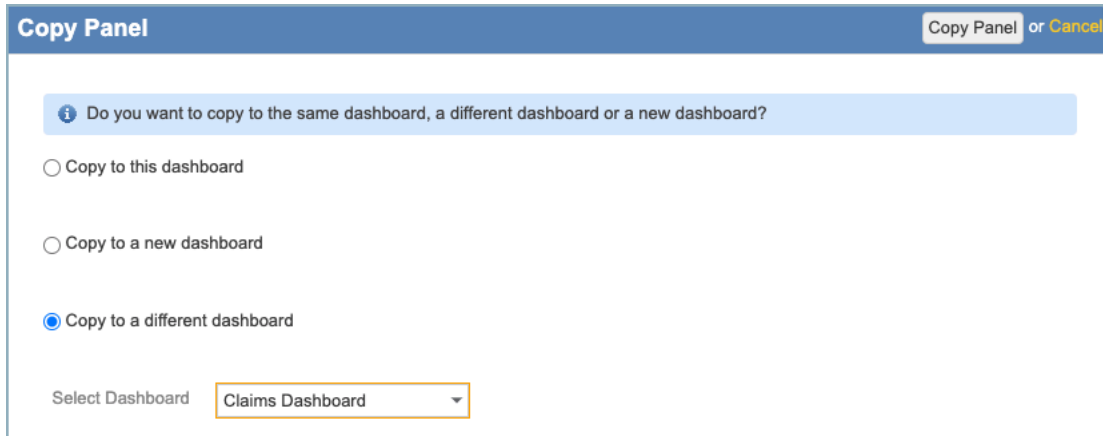
Ability to Copy a Dashboard Panel to Another Dashboard

It is now possible to copy a dashboard panel to another dashboard.

Always Expanded

Claims by Day of Week

Day	Color
Tuesday	Red
Monday	Teal
Sunday	Dark Blue
Saturday	Light Blue
Friday	Purple
Thursday	Green
Wednesday	Yellow



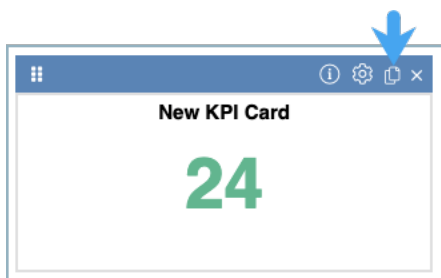
Custom Widget Builder – Ability to Define First Month on X-Axis

There is now an option to select the starting month under Data Options in the custom widget builder for the following chart types:

- Bar
- Column
- Line
- Stacked bar/column
- Multi bar/column
- Line/bar combo
- Heat map
- Summary grid

Dashboard KPI Cards – Ability to Copy/Move to Another Dashboard

It is now possible to copy or move a KPI card to another dashboard.



Copy Widget
Copy Widget or Cancel

i Do you want to copy to the same dashboard, a different dashboard, or a new dashboard?

Copy to this dashboard

Copy to a new dashboard

Copy to a different dashboard

New Custom Levels Section in Admin

Origami has added a new section called “Custom Levels” in **Admin → Reporting**. This section will support Lag and Loss levels.

Administration

Reporting

Custom Levels

Define custom levels for reports and widgets.

Example of a Lag Level Edit Page

Age Levels

General

Name *

Description

Domain *

Level Type *

Lag Details

Lag Type

Start Date *

End Date *

Levels

Level 1 *	<input type="text" value="18.00"/>
Level 2	<input type="text" value="25.00"/>
Level 3	<input type="text" value="35.00"/>
Level 4	<input type="text" value="45.00"/>
Level 5	<input type="text" value="55.00"/>

The Level Type is Lag or Loss Level. If Lag Level, the Lag Details section will display. Lag Type can be days, months, or years, depending on the typical lag range. For lags, select two dates from the domain and up to five levels.

Loss Levels Example

Paid Medical Level

General

Name *

Description

Domain *

Level Type *

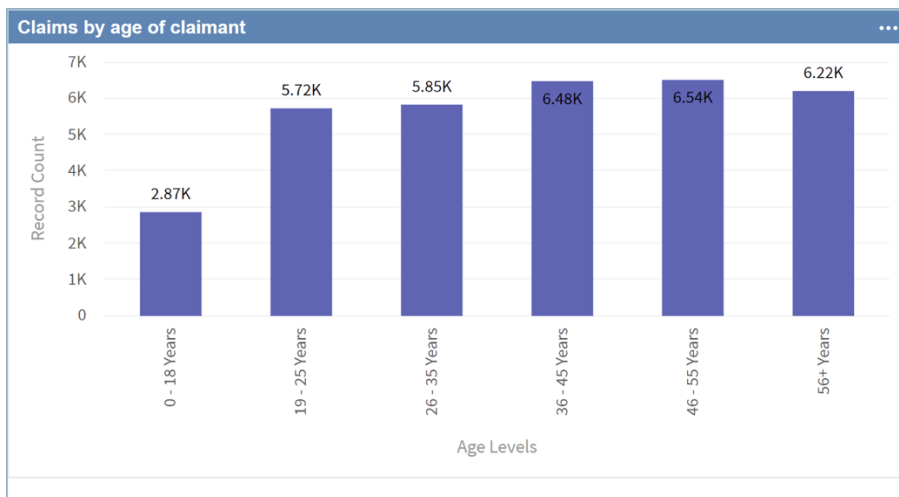
Loss Level Details

Amount Field

Levels

Level 1 *	<input type="text" value="5.00"/>
Level 2	<input type="text" value="10.00"/>
Level 3	<input type="text" value="100.00"/>
Level 4	<input type="text" value="500.00"/>
Level 5	<input type="text" value="5,000.00"/>
Level 6	<input type="text" value="10,000.00"/>
Level 7	<input type="text" value="1,000,000.00"/>
Level 8	<input type="text"/>
Level 9	<input type="text"/>
Level 10	<input type="text"/>

For loss levels, you simply select a numeric field. Loss levels allow up to 10 levels. Once created they will appear as group fields in reports/dashboards for the appropriate domain. A widget might look like this:



A report might look like this:

ACME, INC.		
Valued as of 08/02/2022		
Claim Number	Claimant	Loca
Paid Medical Level: 0 - 5		
TRWC-0012315	Fred Smith	212
WC-24423948	Smith, Fred	70
13-2344-1	Smith, Freddy	BOGT
WC-23485734	Washington, John	86
69	Snowden, Bill	68
70 2	Snowden, Bill	28
2017:97	Jones, Mary	102
2018:100	Artist, Scam	86
Totals for 0 - 5 - 8 Claim(s)		
Paid Medical Level: 10.01 - 100		
WC-23423432	Jones, Sam	61
Totals for 10.01 - 100 - 1 Claim(s)		
Paid Medical Level: 100.01 - 500		
2019:106	Maximum Security	42
Totals for 100.01 - 500 - 1 Claim(s)		
Paid Medical Level: 500.01 - 5,000		
WC2134123	Really Injured Guy	86
WC-2938472398	Johnson, Sue	35
41	Snowden, Bill	69
Totals for 500.01 - 5,000 - 3 Claim(s)		
Paid Medical Level: 5,000.01 - 10,000		
2019:102	Med Bill Claim	86
199954690826200	Bender, Jose	28

“Show Record Count” Total Update

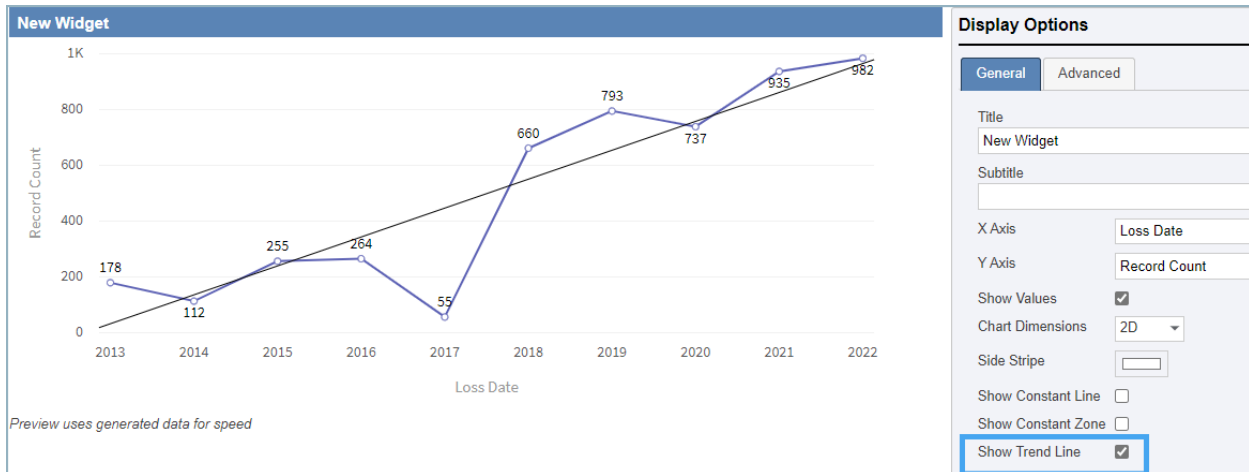
The “Show Record Count” total will now display a drilldown link on widgets based on the report data sets.

Show Total Record Count Data Set		
Claim Number	Claimant	Total Incurred
10-1	EMC Test Copied Claim	0.00
2007-0000001		2,571.43
2007-0000002		5,142.86
2007-0000003		3,142.86
2007-0000004		7,848.57
2007-0000005		5,133.43
2007-0000006		9,511.71
2007-0000007		8,186.29
2007-0000008		14,658.57
2007-0000009		13,210.71
		69,406.43

1 to 10 of 127

“Show Trend Line” Option

For bar, column, or line charts, there will now be an option called “Show Trend Line” right after the Show Constant Line/Zone options. If checked, Origami will use the least-squares regression method of computing a trend line.



Widget – Dynamic Titles/Subtitles/Grid Column Headers

Origami will now allow formulas for titles, subtitles, and grid column header so that they can be dynamic. This will support standard form processor tags like mail merge:

<https://live.origamirisk.com/Origami/LetterTemplates/Help>

The standard tags and formatting will work but fields like Loss Date cannot be used because there is not a single record involved. Origami will translate all properties from the Option Form or widget options, so a widget with two pval dates would be able to reference those.

NOTE: Relative dates will be evaluated, so if you use {Pval} as a tag and it is set to “First Day of Last Month,” it will display (if run on 2/3/2022) as 1/1/2022.

The screenshot shows a dashboard interface with several components:

- Filters:** Includes 'Show Others', 'Per Occurrence', 'Valuation Date' (01/02/2022), 'Incurred Formula' (Net Incurred), 'Group Filter' (No Filter), and 'Pathway' (Go to records).
- Visualizations:** A row of icons for various chart types (pie, bar, line, etc.) and a '42' indicator.
- Table:** A table with columns 'Loss Year' and 'Record Count'. The data shows years from 2013 to 2020, each with a record count of 123.
- Display Options:** A panel on the right with tabs for 'General', 'Conditional Formatting', and 'Advanced'. It includes a 'Do Not Cache Data' checkbox and a note: 'Caching data improves dashboard performance.'

Custom Widgets Apply Business Unit Access Security

Custom Widgets will now apply Business Unit Access security on domains that use it. Logged in as a user with full permission to Business Units, a user will get the below results: Note the Risk with the “Unit 1” Business Unit.

Risk Grid		
Name	Risk Category	Business Unit
Data Protection Due Diligence	Compliance	None
Data Security and Data Privacy	Compliance	None
Failure to invest in and update technical infrastructure	Compliance	None
Global Privacy Risk	Compliance	None
I am a subrisk to MARY TEST	Compliance	None
I am also a subrisk to MARY TEST	Compliance	None
Inadequate procedures	Compliance	None
Ineffective understanding of data privacy & security implications	Compliance	None
MARY TEST	Compliance	None
Polar Vortex impacting our CHI office	Compliance	None
Risk & Control Matrix	Compliance	None
Security & On-Going Security Monitoring	Compliance	None
Test	Compliance	None
Volatility in Global Financial Markets	Compliance	Unit 1
Volatility in Global Financial Markets - Denver	Compliance	None

Alternatively, another user who has limited Business Unit Access and does not have access to the Unit 1 Business Unit, will get these results from the widget:

Risk Grid		
Name	Risk Category	Business Unit
Data Protection Due Diligence	Compliance	None
Data Security and Data Privacy	Compliance	None
Failure to invest in and update technical infrastructure	Compliance	None
Global Privacy Risk	Compliance	None
I am a subrisk to MARY TEST	Compliance	None
I am also a subrisk to MARY TEST	Compliance	None
Inadequate procedures	Compliance	None
Ineffective understanding of data privacy & security implications	Compliance	None
MARY TEST	Compliance	None
Polar Vortex impacting our CHI office	Compliance	None
Risk & Control Matrix	Compliance	None
Security & On-Going Security Monitoring	Compliance	None
Test	Compliance	None
Volatility in Global Financial Markets - Denver	Compliance	None

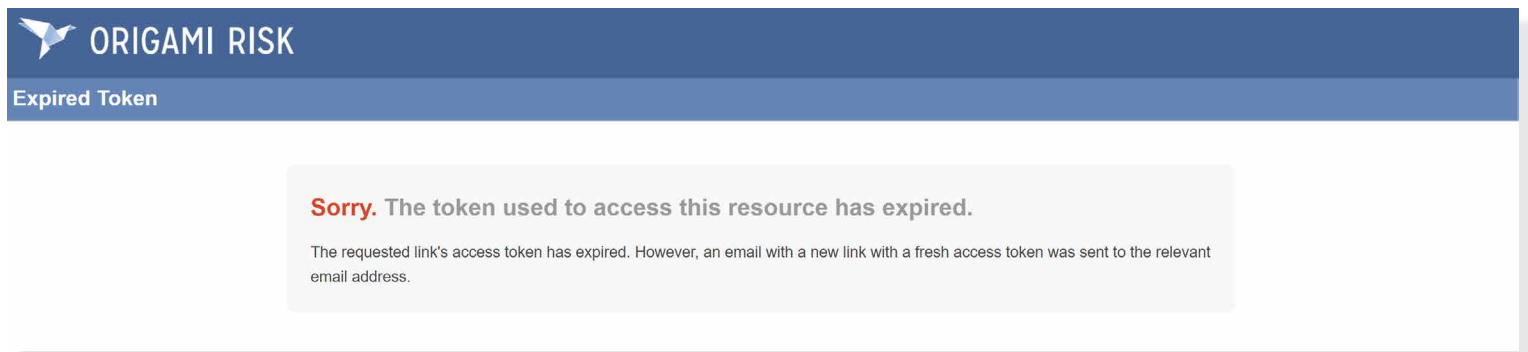
The widget data is cached, if business unit access security is changed for a user, the widget data will need to be refreshed for the results to show the expected changes.

UPDATE TO VALUES COLLECTION LINKS

What's Changing

With our product release on April 9, 2022, we updated the Values Collection links to add another layer of security to the process.

Prior to this release, when a values collection link was created and distributed, the link did not expire and was accessible as long as the values collection is active. **With this release, values collection links will expire thirty (30) days from the date they are generated.** Link tokens will be inserted in to the URLs when they are generated, and through these tokens, the Origami system can validate whether the date the token was generated is less than 30 days ago. If the link has expired, the user trying to access the link is sent to an inactive page letting them know that they will be immediately emailed a new, active link to the email address provided. See below for an example of that page:



Next Steps

If you have an active values collection with a link that was generated prior to April 10, 2022, that link will no longer be valid on May 1, 2022. For any values collection links generated on or after April 10, 2022, they will generate with the new rules in place and expire after 30 days.

To make sure your link recipients always have a valid link, we recommended that you send out reminder (follow-up) emails at least once every 30 days. Each time a follow-up email is sent, a new link will be created that will be valid for 30 days from the time of generation. If you have any additional questions, please contact your Origami Service team.