October 2022

Client Release Notes

Disclaimer: These release notes cover the whole gamut of offerings from Origami Risk. You may or may not have these options in your system. Also, depending on your User Rights, you may not be able to access some of these features. Lastly, your System Administrator may have changed the way these items are named in your system.

Table of Contents

What's New

New Modules

NEW Inventory Management Solution

Why: This new standard solution allows you to track the inventory of Chemicals, Assets, or Vehicles across different Locations.

Previously: This could only be done with custom configurations.

New Solution: With this new solution, you can update and track your Inventory with transactional history.

User Access Needed: Users will need their permissions updated to use Inventory Management.

1. **Admin> Users and Security**
2. Grant access in the following sections:
   - **Inventory**
   - **Inventory Item**
   - **Inventory Transaction**

New Domains:

Inventory

Inventories are places where items are being stored, like rooms, supply closets, or garages. They can be linked to Locations and Building Facilities. You can also create sub-inventories to provide further granularity with inventory tracking.

Inventory Items

Inventory Items are the actual items being stored in an Inventory, like a fleet of trucks or containers of chemicals. You can add as many Inventory Items as needed to an Inventory.

Inventory Transactions

Transactions are how the quantity of Inventory Items are updated.

- You can submit a Transaction from both an Inventory view form (on the Inventory Items grid panel) or from an Inventory Items form/search screen.
- There are three options available: Add, Remove, and Transfer.

Measurement Units and Measurement Unit Types Code Tables

We also have two new code tables: **Measurement Units** and **Measurement Unit Types** that track the units of measurement in Inventories.

Inventory screen

New Asset Inventory Screen

FUTURE- Management of Change Solution

We will soon have a Management of Change solution in Origami Risk!

Previously: There was no standard solution available. Clients tracked their MOC Requests and Approvals through Custom Defined Entities (CDEs).

Now: We are working on standardizing this solution. Once finished, you will be able submit MOC Requests for your EHS programs and track their reviews and approvals.

Mini Help Guides

Mini Help Guide List

We have several, detailed, Mini-Help Guides available in various parts of the system. Use the following table to learn more about these guides and where they are found.

Mini Help Guide	URL Path to view the Mini Help Guide- Log in, then update the part after */Origami/* as shown
Help on Forms XML: For help with customizing the fields and layouts of forms, including understanding the structure of Form XML, over 35 form elements, and attributes for each element. **Content List**:	(YourCurrentURL)/Origami/Forms/Help Or **Admin > Custom Forms >** select your Form Set > **More > Help**
Help on Forms XML (For Mobile Forms) For help with customizing the fields and layouts of forms that will be used on the **Mobile Forms** App, including understanding the structure of Form XML, form elements, and all attributes for each element.	(YourCurrentURL)/Origami/Forms/Help?mobile=True Or **Admin > Mobile Forms >** Select your mobile form. In the Information Tip, select "Click Here"

Content List:
 	
Overview
\<form> Element
 \<panel> Element
  \<column> Element
   \<section> Element
    \<field> Element
    \<lookup> Element
    \<mapLookup> Element
    \<benefitRateLookup> Element
    \<custom> Element
    \<value> Element
    \<html> Element
    \<space> Element
    \<sketch> Element
    \<diagram> Element	

Help on Formula Syntax For help with standard SQL Syntax of formulas in custom templates and Custom reports including: If Else, Date Functions, Math Functions, Text Functions, Incurred Formula Tokens, and Formulas in Summary Templates. **Content List**: Overview If Else Date Functions Math Functions Text Functions Incurred Formula Tokens Formulas in Summary Templates	(YourCurrentURL)/Origami/Templates/Help Or **Reports > More > Custom Templates >** select a custom template. In the Information Tip, at the top of the screen, select "Click Here" for help on formula syntax
Help on Merge Fields: For help working with Mail Merge fields in Microsoft Word to create Mail Merge Letter Templates including inserting, formatting, calculations, formulas, conditional context, images, QR codes, ranges and nested ranges of hierarchical data, and how to include information from: attached contacts, addresses, the location hierarchy, the territory hierarchy, another template, and insured certificates. Also included is a list of standard Mail Merge fields by Area.	(YourCurrentURL)/Origami/LetterTemplates/Help Or **Admin > Mail Merge Templates >** Select a template **> Edit Letter Template.** In the Information Tip, at the top of the screen, select "Click Here"

Content List: How to insert merge fields in Microsoft Word 2007 How to insert merge fields in older versions of Microsoft Word Merge field basics How to include ranges and nested ranges of hierarchical data How to include information from attached contacts How to include information from the location hierarchy How to include information from the territory hierarchy How to include information from an insured certificate How to control formatting for your merge fields Support for basic calculations and formulas Support for conditional content Include content from another template Include address content Including images like signatures, logos, QR codes and attached image files Standard merge fields by area	
Help on Screen Configuration: For help with configuring the Grid Panels, Columns, and Search fields on Form Sets, including default columns, search fields, sort fields, hidden fields, allowed fields, header fields, bulk update fields, required On Lookup fields, and list layout. **Content List**: General Default Columns Search Fields Sort Fields Required on Lookup Fields List Layout Hidden Fields Allowed Fields Header Fields Bulk Update Fields	(YourCurrentURL)/Origami/Forms/ScreenHelp Or **Admin > Custom Forms >** select your Form Set **>** select a **Search Screen Configuration** area's "New" or "Edit" (on the right side of the screen, below 'Navigation Configuration' In the Information Tip, at the top of the screen, select "Click Here"

Accessing Our Mini Help Guides: To access our Mini Help Guides, first log into Origami. Then, update your URL path after "*/Origami*/" to include the new path from the table above.

Example: Sam is currently on the **My Profile** screen. To access the "Help on Forms XML" Mini Help guide from here, Sam will update their URL:

From: live.origamirisk.com/Origami/Account/MyProfile

To: live.origamirisk.com/Origami/Forms/Help?topic=overview
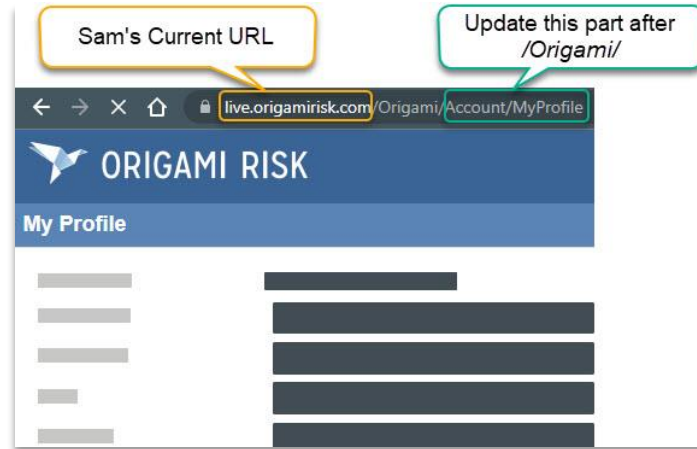
Systemwide

Checkbox to receive Origami Emails about Releases and Downtime has been renamed

Previously: Under **My Profile**, this checkbox was called "General Communications". Many people thought it meant you would receive marketing information, when it really meant you would receive emails about system downtimes and future releases.

Now: This checkbox has been renamed "Release and Maintenance Communications" for clarity.

Turned on: You will receive emails from Origami regarding upcoming releases, scheduled downtime, etc.

Turned off: You will NOT receive any emails from Origami regarding upcoming releases, scheduled downtime, etc.

Custom Form? If you have changed this form, you will need to update this checkbox name change manually.

How/Where: You can access the **My Profile** screen from the **GEAR** ⚙ menu > **My Profile**.

Not Receiving Emails? If you have this setting turned on and you are not receiving emails, double check that your email is correct on this screen.

Export data to a CSV file from the More Menu

Previously: This functionality was not available. The work around was to first export the data as an Excel spreadsheet, then convert it to a CSV file.

Now: You can now export data directly to a CSV file from the **More** menu. This functionality is available in various places in the system, wherever you can currently "Export to Excel."

Some examples: Exporting a list of Batch Processes, Data Entry Events, Report Schedules, and all Locations.

Generate QR Codes within Origami

Previously: This functionality was not available.

Now: You can now generate QR Codes within Origami or add QR Codes directly to a form via XML.

How/Where: See detailed instructions in the "**Help on Forms XML"** Mini Help Guide in the `<qrCode> Element` section (See the Mini-Help Guide list above, for more information.)

Associations

Associate Documents with Assets

Previously: You were unable to track which Documents relate to which Assets.

Now: You can associate Documents to an Asset in two places: Document Controls and Assets. These new associations can also be viewed in the Sunburst Charts. (Sunburst Charts are a visual representation of all associations for the current Document or Asset.)

How:

In Document Controls

1. **Document Controls >** select a document in which you are an owner
2. Add an associated Asset:
   - **More > Assets**
   - OR In the **Assets** section of the Document Control, click **Manage Associated Assets**. (*This section is only displayed when you currently have an associated Asset.*)
3. Select all Assets associated to this Document, then click **Done Selecting.**

Sunburst Chart: **Document Controls > View File >** Click the **Connections** button to see all associations for this Document. *(The Connections button is only displayed when there are connections.)*

In Assets

1. **Assets >** select the Asset **> More > Document Controls**
2. Select all Documents associated to this Asset, then click **Done Selecting**.

Sunburst Chart: **Assets > View Form >** Click the **Connections** button to see all associations for this Asset. *(The Connections button is only displayed when there are connections.)*.

Associate Chemical Ingredients with Risk Governances

Previously: This functionality was not available.

Now: You can now associate Chemical Ingredients with Risk Governances. These new associations can also be viewed in the Sunburst Charts. (Sunburst Charts are a visual representation of all associations for the current Chemical Ingredient or Governance.)

How/Where:

In Chemical Ingredients

1. **Chemical Ingredients >** open a Chemical Ingredient
2. Add an associated Governance:
   - **More > Governance**
   - OR In the **Governance** section, click **Manage Associated Governances** (*This section is only displayed when you currently have an associated Governance.*)

View the Sunburst Chart: Click the **Connections** button to see the Sunburst Chart for this Chemical Ingredient. *(The Connections button is only displayed when there are connections.)*

In Governances

1. **Governances >** open a Governance
2. Add an associated Chemical Ingredient:

   - **More > Chemical Ingredients**
   - OR In the **Chemical Ingredients** section, click **Manage Associated Chemical Ingredients** (*This section is only displayed when you currently have an associated Chemical Ingredient.)*

View the Sunburst Chart: Click the **Connections** button to see the Sunburst Chart for this Governance. (The Connections button is not visible if there are no connections)

Associate multiple Locations and Territories to a Risk

Previously: When on a Risk record, you can only associate one Location and one Territory to a Risk using the **Territory** and **Location** fields. (This is still true.)

Now: You can now associate a Risk with multiple Locations and Territories using the **More** menu from a Location or Territory.

How/Where:

In Risks

1. **Risks >** open a Risk

   o **More > Locations** or **More > Territories**

2. Select all Locations or Territories you would like to associate with the risk.

Sunburst Chart: **Risks >** open a Risk **>** Click the **Connections** button to see all associations for this Risk. (The Connections button is not visible if there are no connections).

In Locations

1. **Locations >** open a Location
   o **More > Risks**
   OR
   o In the **Risks** section on the Location, click **Manage Associated Risks.**
2. Select all Risks associated to this Location, then click **Done selecting.**

Sunburst Chart: **Locations >** open a Location **>** Click the **Connections** button to see all associations for this Location. (The Connections button is not visible if there are no connections).

In Territories
1. **Territories >** open a Location
    - o **More > Risks**

    OR
    - o In the **Risks** section on the Territory, click **Manage Associated Risks.**
2. Select all Risks associated to this Territory, then click **Done selecting.**

Sunburst Chart: **Territories >** open a Territory **>** click the **Connections** button to see all associations for this Territory. (The Connections button is not visible if there are no connections).

Actions

Improved access to Audit Schedules from an Audit Definition

Previously: It was difficult to quickly see if a particular Audit Definition had any schedules. To access schedules from an Audit Definition, you had to select **More > Audit Schedules > Create Audit Schedule > Return to List.** Then the list of Audit Schedules was shown.

Now: There is a new menu option under **More** called **View Audit Schedules***. This menu item will only be available when there are existing Audit Schedules for the current Audit Definition*.

How/Where: From an Audit Definition select **More.** Both features are now under the new **Scheduling** section.

Mark Action Milestones or Activities as complete with the new Owner-Only checkbox

Previously: If you were the Owner or Co-Owner of an Action, you had no override rights to close out an Action. You had to wait for the person assigned to the Action to complete it themselves.

Now: If you are the Owner or Co-Owner of an Action, you can now override the Assignee and mark it as Complete using the new Owner-only checkbox. If you mark a milestone as complete, the system automatically moves the Action to the next milestone.

User Access Needed: You need to be the owner or Co-owner of the action to see this checkbox.

Assets

Generate Abstracts for Assets

Previously: This functionality was not available.

Now: You can now generate Abstracts for your Assets. Abstracts allow you to quickly download a PDF of the view page of an item. You can also Bulk download multiple records.

User Access Needed: Assets and Asset Bulk Actions.

If you can't use this feature, see your System Administrator to update your permissions.

New Role Permission: **Admin > Roles > Asset section >** "Bulk Action - Printable Abstracts"
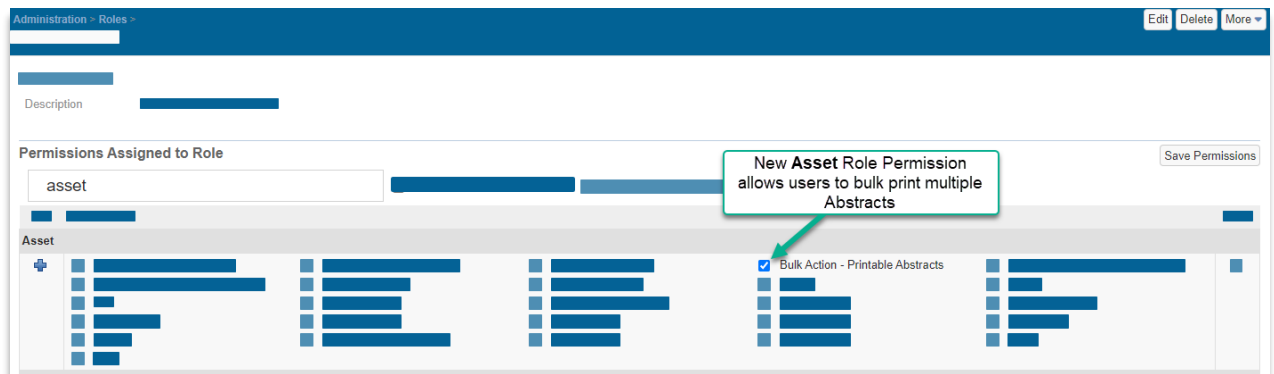
How/Where:
1. **Locations > Asset > More > Printable Abstracts**
2. Select the number of assets to include then click **Next**.
3. Fill in the options for this Abstract:

Audits

Add DEEs for Audit Response Categories and Audit Response Category Groups

Previously: You could only create DEEs for Audit Answers. (You can still do this.)

Now: You can now create DEEs for Audit Response Categories and Audit Response Category Groups as well as Audit Answers. This will enable workflow tasks like sending reminders to Users assigned to Audits.

How/Where: **Data Entry Events > New Data Entry Events >** select the Area: "Audit Response Categories" or "Audit Response Category Groups"

Audits Templates imported from STP AuditHub now meet State Regulations

Previously: STP AuditHub Templates only included Federal questions. State specific questions (I.E "State Differences") were not included.

Now: When importing an STP AuditHub Template, you now must select the corresponding State for the Audit (NOTE: California is excluded because it has a separate product line in STP's catalog).

- The newly imported Audit Definition will now have "State Difference" questions for the chosen state, identifiable by their prefix.

New fields/screens: "State" field on the **Import STP AuditHub Template** screen

How/Where: **Admin > Audit Definitions > More > Import Audit Hub Template**
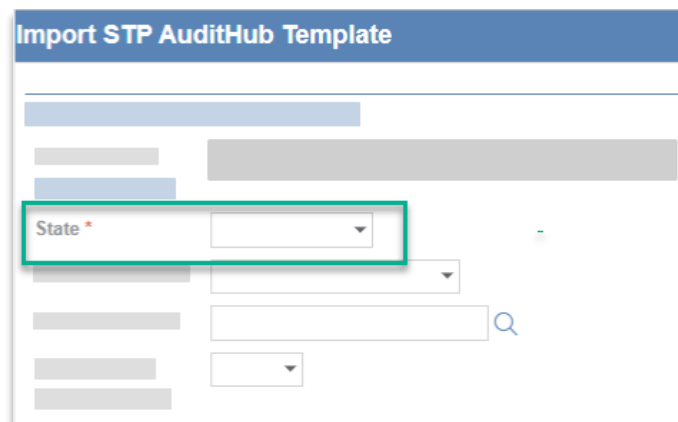
More information: See the July 2022 Client Release Notes (pg. 19) for detailed information on how to import Audit Templates from STP AuditHub.

Reminder Emails now auto-populate with the Assigned User

Previously: When sending a Reminder Email to a User assigned to an Audit Category Group, Audit Category, or Audit Question, you needed to manually enter the **To: address** for every email.

Now: The **To: address** now automatically defaults to the User (internal or external) assigned to that Audit Category group, Audit Category, or Question.

This only affects Audits who have their Audit Group, Audit Category, or Audit Questions assigned separately.

How/Where:

Set up your Audit Definition so that Groups, Categories, or Questions can be assigned separately

1. **Admin > Audit Definitions >** open the Audit.
2. On the **Audit Definition Details** screen, select **Can Assign Separately.**
3. If you also want to assign Audit Category Groups, your Audit Definition must have an **Audit Category Groups** section. If you don't see this section, select: **Uses Category Grouping** (then save).
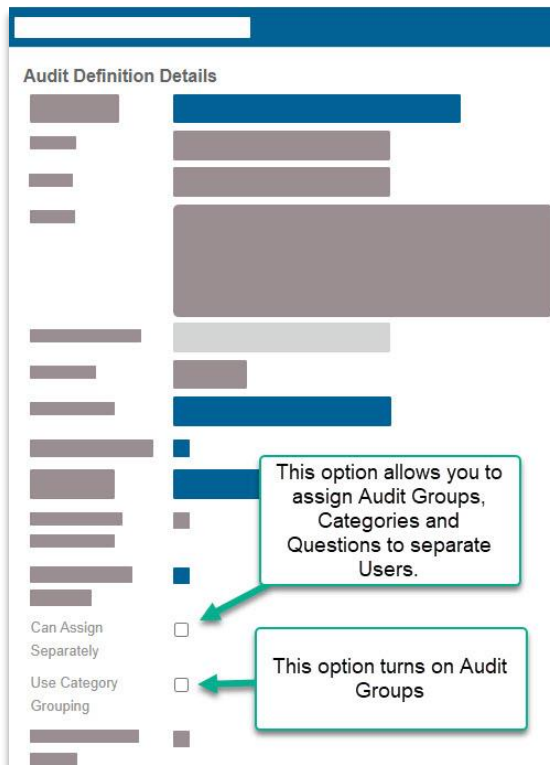
Assign Each Group, Category, Question separately

1. Create an **Audit** (that has the option to assign each Group, Category, or Question separately.)

2. For each Group, Category, or Question, click the Assign ✏ button if you want to assign that item separately.
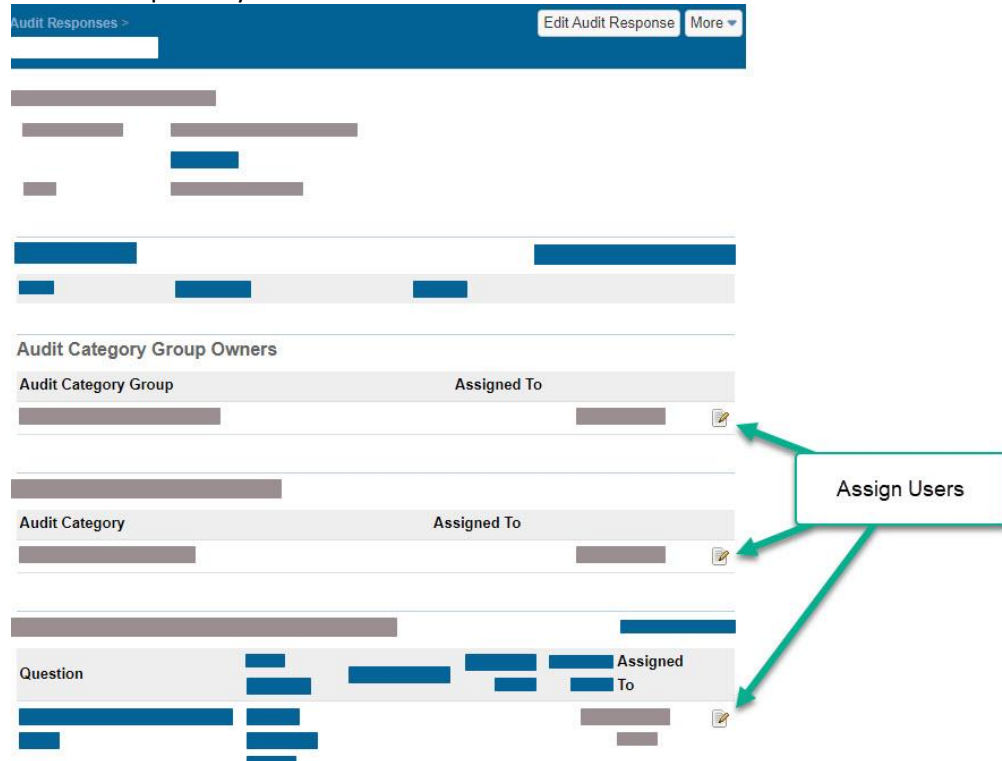
Submit the Audits to these separately assigned Users
1. When you are finished assigning Users, click **More > Create External Access**
2. Fill out the fields, then click **submit** to give these Users external access to this Audit.

Send Remind Emails
1. Once the Users have been sent their Audits, an email ✉ button is displayed next to the Assign ✏ button. *The Email icon will only be displayed for items that were assigned separately.*
2. Click the Email ✉ button.
3. The **New Email** screen is displayed with the **To** field auto populated with the Assigned User's email address.

Save custom views and perform advanced searches on Audit Answers

Previously: This functionality was not available.
Now: You can now complete advanced searches, edit column information, edit the criteria in your Audit Answers view, and save custom views on Audit Answers.
How/Where: Open an **Audit Response**, then select **All Audit Answers**.
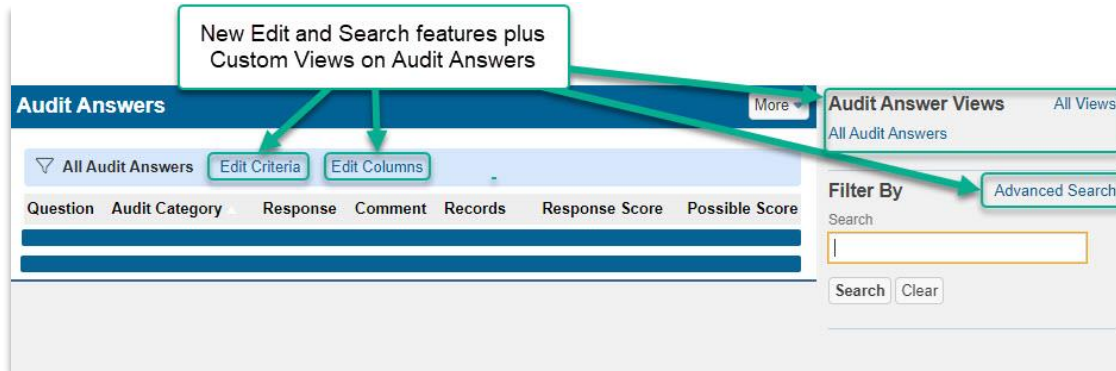
Billing / Payments

Allocate overpayments to an Agency Payment

Previously: You were unable to overpay either an Agency statement or a line item in an Agency statement. To complete a payment, the amount had to be fully allocated.

Now: When allocating a new payment to the Agency bill, you can now add any overpaid/unallocated amounts to one or more line-items on the bill.
- The overpaid amount is kept at the Policy level as an unallocated amount.
- This functionality is also available using the `AllocateAgencyPaymentToPolicy` method.

How/Where: Overpaid/unallocated amounts are shown on the **Agency Billing** screen (**Agencies >** Open the Agency **> More > Agency Billing**) as a negative balance. They are also shown on the **Policy** screen (**Policies >** open the Policy **>** scroll down to the **Premium Invoices** section) as an unallocated amount on a Premium Invoice.

To allocate an overpaid/unallocated amount
1. Open the **Agency**
2. Select **More > Agency Billing**
3. On the **Agency Billing** screen, select **Enter Agency Payment**
4. Enter the payment details, then **Save Changes**
5. On the **Allocate Payments** screen, select the invoices that contain the unallocated amounts as well as any other invoices.
   - Unallocated amounts will show as a negative "Amount due" on an Invoice.

Change Mid-point Rounding for Commissions

Previously: The system rounds Commission calculations like 270.375 to 270.37. (This is still true.)
Example: A premium of 1050 with a commission of 25.75 comes out to a total commission of 270.375. The system rounds that commission to 270.37.
Now: We have a new system setting that allows you to change the way the system deals with Mid-point rounding. Normally, the system will mid-point round down toward 0.

If you would prefer Commissions mid-point rounding to round up, see your Origami System Representative to activate the new Commission Rounding setting.

Commission Disbursement changes for Agency and Direct-Billed Policies

Previously: The commission disbursement process for Agency and Direct-Billed Policies was determined by subtracting from an invoice or issuing a check.
Now: The commission disbursement methods are now directly linked to the billing method.
- You can no longer select the disbursement method at the **Rating Program** level.
- **Rating Programs** will now ignore any scripting (within the Rating Program) that overrides the disbursement method.

For **Direct Billed Policies:** the disbursement will always be by check.
For **Agency Billed Policies:** the disbursement will always be by subtracting from the invoice.
For **Policies with a 2nd Broker who receives the commission**: the disbursement will always be by check.

Pay Commissions to the Broker Office

Previously: Broker commissions could only be paid to the Broker on the policy. You could not pay commissions to the Broker Office.
Now: You can now disburse payments to a Broker office.
New Fields: On the **Broker Offices** screen:
- **Commission Payable Level** drop down list. Options include:
  - **Broker Office** – If this is selected, the commission is paid at the Broker Office level. The commission on the policy will be paid to the broker office and the Payee Contact name will be used to issue the check. *You must enter the Contact name for the Broker Check in the **Payee Contact** field.*
  - **Agency** - If this is selected, then the commission is paid at the agency level. This is the current functionality and is also the default one.
- **Payee Contact** field. Select the Contact name that will be used to issue the Broker check. *This only applies if you have selected "Broker Office" from the **Commission Payable Level** drop down list.*

*To use these fields, you will need to add both fields to the Broker Offices screen in **Admin > Custom Forms > Broker Offices***

How/Where: On the Broker Office screen. When you set the Broker Office to collect commissions, the commissions can then be disbursed to the broker office that is tied to the Agent on the policy.

Prorate Equity Billing Daily

Previously: Equity Billing is available as a monthly option. (This is still true). You could only calculate the prorate on Equity using a monthly proration factor.

Now: You can now select either a monthly or daily proration.

New field: **Equity Pro Rata Basis** on the **Billing Profile** screen

How/Where:
1. **Admin > Billing Profiles**, edit a Billing Profile.
2. Scroll to the **Equity Billing Options** section.
    a. In the **Enable Equity Billing** drop down list, select **Yes.**
        • Additional fields will now be displayed.
    b. You can select either: **Bill Immediately** or **Bill Next Invoice**.
    c. In the new **Equity Pro Rata Basis** drop down list, select 'Daily'.

Select "Involved Parties" as the Payee for Check Payments
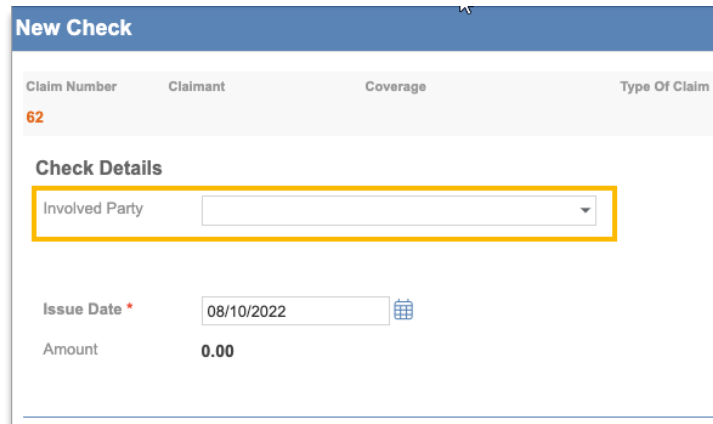
Previously: When there is an associated Claim or Loss Event, you could not select Involved Parties when creating check payments. You could only select Involved Parties for creating Payments.

Now: When there is an associated Claim or Loss Event, you can now select one of the Involved Parties for Check Payments as well as Payments.

If you don't see Involved Parties as a payment option, see your Origami Service Administrator to update your system settings so you can use this feature.

How/Where:
1. Open the Claim where the check will be issued.
2. **More > New Check**
3. If there is an Involved Party associated with this Claim, the Involved Party drop down list will contain the associated Involved Parties.

Select Written or Invoiced Premium for Agency Billing Commission Basis

Previously: The Commission Basis for Agency Billing had the same options as Direct Billing.

Now: You now have two options when using Commission Based Agency Billing: Written Premium or Invoiced Premium.

New Fields/Screens:

On the **Billing and Commissions** screen**:**

- The **Default Commission Basis** checkbox has been renamed **Default Commission Basis (Direct Billing)** for clarity.
- The new **Default Commission Basis (Agency Billing)** drop down list on the **Ratings Programs** screen and **Broker** screen allow users to select separate options for Agency Billing commission basis, either Written Premium or Invoiced Premium.

How/Where:

1. **Admin > Rating Program >** Open a **Rating Program**
2. Click **More > Billing & Commissions**
3. On the **Billing and Commissions** screen, scroll down to the Commissions section to see the new fields.

Write-Off Negative Amounts

Previously: You could only Write-Off positive amounts.

Now: You can now also Write-Off negative amounts.

New Fields/Screens: "Negative Write-Off Limit" on the **Financial Limits and Approval Groups** screen
- Enter the maximum Negative amount you want to write-Off.
  - If you want no limit, leave this field blank.
  - If you want to restrict Users from entering any negative Write-Offs, enter: "$0"
- Users will not be able to create a Write-Off that exceeds this threshold.

How/Where:

1. **Admin > Financial Limits and Approval Groups >** New **Financial Limit Group**
2. The new "Negative Write-Off Limit" field is in the **Transaction Limits** or **Premium Transaction Limits** section:

New Financial Limit Group screen

Claims

Merge duplicate Involved Parties

Previously: You were not able to merge duplicate Involved Party records or remove Involved Party records at the claim level.

Now: You can now manage Involved Party entries at the claim level.

- You can merge Involved Party entries with duplicate information, including email or phone number.
- You can also delete Involved Party entries if no transactions have been made to that Involved Party.

User Access Needed: Users will need new permissions granted to use this functionality.

1. **Admin> Users>** Select the User
2. Search for: **Involved Party** (with **"only Apply Filter to Area Names"** selected)
3. Update this permission: "Merge"

View the Financial Summary of Involved Parties

Previously: This functionality was not available.

Now: When you view an Involved Party that is a Payee, a new Financial Panel will be displayed which shows a comprehensive view of the payments, reserves, outstanding, and incurred balances relating to the selected Involved Party.

How/Where:

> **Tip**: To add an Involved Party to a Claim: Open the **Claim > More > New Involved Party**

View the Financial Summary

1. Open a **Claim** that has an Involved Party
2. On the Claim, scroll down to the **Involved Parties Section** and select the Involved Party.
3. On the Involved Party screen, the new section is called "Current Financials".

Claims > InvolvedPartier (58) >
Involved Party (Party 1)

Current Financials   Prior Valuation Show Graph

	Reserves	Paid	Outstanding	Incurred
+ Med/BI/Comp	0.00	100.00	0.00	100.00
+ Expense	0.00	0.00	0.00	0.00
+ Ind/PD/Coll	0.00	0.00	0.00	0.00
+ Legal	0.00	0.00	0.00	0.00
+ Other	0.00	0.00	0.00	0.00
- Recovery	0.00	0.00	0.00	0.00
- Subrogation	0.00	0.00	0.00	0.00
Net Incurred ▾	0.00	100.00	0.00	100.00

If you don't see Involved Parties, ask your system administrator to update your permissions.

Custom Forms

Add KPI Card Widgets (from a Dashboard) to your Forms

Previously: KPI cards could not be added directly to a Domain's Edit/View Form (for example, a Contact Form)

Now: You can now add KPI cards directly to a Domain Edit/View form. The `<kpiPanel>` is like the `<widgetPanel>` element, but instead of rendering one dashboard widget on a form, it renders multiple KPI card widgets shown from a corresponding dashboard's ID.

How/Where: **Admin > Custom Forms**

> **Example:** `<kpiPanel title="Metrics" dashboardID="10387" />`
> This will display the KPI panel cards from the referenced dashboard ID 10387 on the form.

Help In the System: See detailed instructions in the "**Help on Forms XML**" Mini Help Guide. (See the Mini-Help Guide list above, for more information.)

Add specific Search fields to your Values Collection screen

Previously: On the Value Collections screen, you were only able to search on the **Name** field.

Now: You can now add specific search fields by using **Search Screen Configuration** in Custom Forms.

How/Where: **Admin > Custom Forms >** select your FormSet **>** In the right Panel, select the **Value Collection's** "Edit" or "New" from the Search Screen Configuration

Conditionally render Images on Forms

Previously: If you added an image to a form, it would always appear there.

Now: You can now toggle images on or off, or conditionally render them on a form.

- You can apply either the `toggleFormula`, or `toggleField` and `toggleValues` attributes to `<image/>` form XML elements to toggle its display based on other fields.
- You can use the "`if`" attribute to conditionally render an image when the page loads.

Attributes Updated: The attributes: `toggleField`, `toggleValues`, and `toggleFormula` are now applicable to images on Forms.

How/Where: Custom Forms

Easily edit a Form Snippet from a Custom Form

Previously: It was cumbersome to edit a Form Snippet when you were viewing/editing a Custom Form. (**More > Form Snippets**, open the snippet **> Edit Form Snippet**)

Now: You can now easily edit a Form Snippet when you are on the **View Form Snippet** screen.

New Button: **Edit Form Snippet** button on the **View Form Snippet** screen.

How/Where:

1. **Admin > Custom Forms >** open the Form set
2. Open the View/Edit mode of the Custom Form.

3. In the Snippet List (in the side panel on the right), click the magnify glass of the Form Snippet you want to edit.
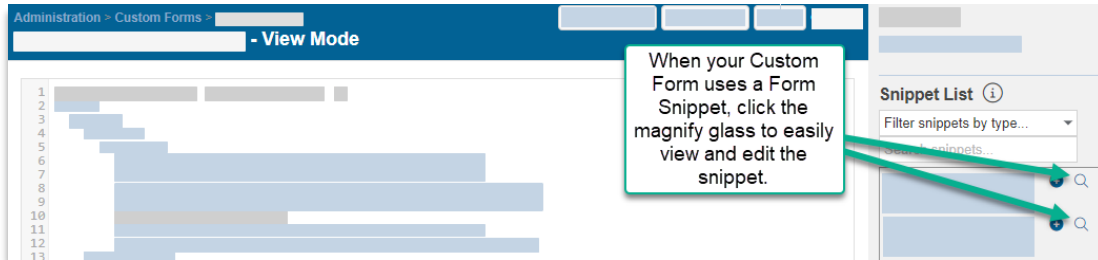
4. On the **View Form Snippet** screen, click the **Edit Form Snippet** button.
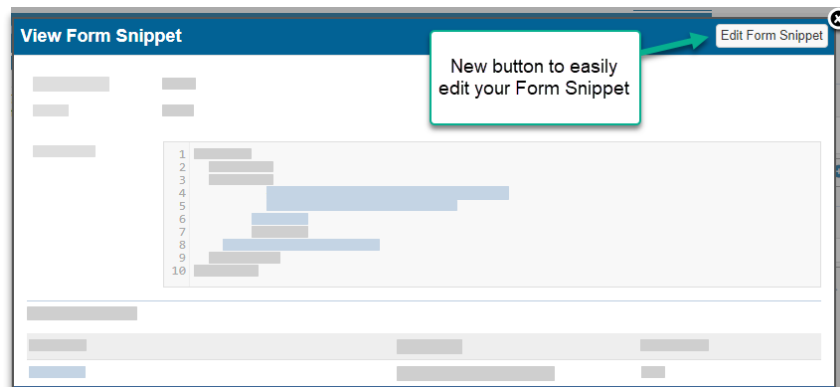
Expand or collapse Mail Merge Panels in your Custom Form

Previously: You could only display a Mail Merge Panel fully expanded. There was no way to minimize it. Mail merge panels give you the ability to display a Mail Merge on a single record's view or edit form.

Now: You can now use two new Mail Merge Panel attributes to modify how your panel expands or collapses.

- `enableExpandCollapse` makes your Mail Merge Panel expandable/collapsible.
- `expandedByDefault` determines if your Mail Merge Panel is expanded or collapsed by default.

How/Where: The "**Help on Forms XML**" Mini Help Guide has been updated to include these new Attributes in the `<mailMergePanel>` **Element** section. (See the Mini-Help Guide list above, for more information.)

Dashboards

Create Scrolling Text Widgets

Previously: There were no widgets that scrolled text.

Now: The new widget: "Scrolling Text Announcement" will scroll your custom text across the Dashboard. You can adjust the font's style, size, and color as well as the background color and text speed.

How/Where:
1. On your Dashboard **> Edit Dashboard > Add Widget**
2. Search for and select the **Scrolling Text Announcement** Widget.
   - **Speed**: this field determines how fast or slow the text will scroll across the dashboard.   1 is the slowest, with 10 being the fastest.
   - **Preview Width**: this measurement is only used for visualization purposes on this setup screen. This width does not affect the finished widget on your dashboard.

   Note: If you make a change to your Announcement message, you must click out of the text field so the Preview can update with your changes.

3. **Save Changes**.

To change the widget's width on the Dashboard

On your dashboard, select the width setting for the panel:

Example: 1 column wide will show your scrolling message across the whole screen.

Create Widgets with Audit Answers

Previously: This functionality was not available.

Now: You can now create widgets using Audit Answers.

How/Where:
1. **Edit your Dashboard >** Click **Add Widget**
2. On the **Add Widget** screen, select **New Widget**
3. On the **Data Set for New Widget** screen, search for Type: **Domain**
   a. Scroll to the **Audit Answers** section and select: **Select Data Set**.

If you don't see Audit Answers, ask your System Administrator to update your permissions.
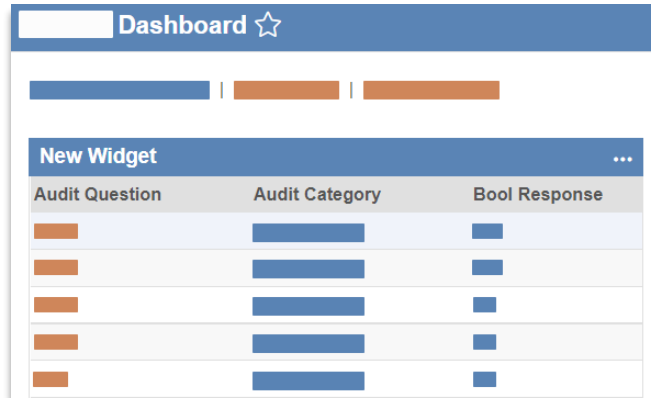
Scroll through a set of Images on your Dashboard

Previously: This functionality was not available.
Now: Use the new Dashboard Widget: **Scrolling Image** to scroll through a set of images on your
Dashboard. Upload your images to the widget then set how often you want the images to
change.

Example use: Show images from the last company event in a common area.

User Permissions needed: To see the "Upload Images" link, Users will need to have the **Upload
Unlinked Files** permission on the **Files** Domain.

Limit Edit access to Shared Dashboards

Previously: The Dashboard Edit and Delete Permissions were: "Edit", "Delete" and "Delete Public".
There was no "Edit Public" option. The Edit function allowed Users to edit any shared
dashboard, regardless of who created it.
Now: The above Delete Permissions have been renamed for clarity and consistency.
- Delete is now "Delete Mine"
- Delete Public is now "Delete"
We have also added one more Edit functionality called "Edit Mine" that allows Users to edit
dashboards they created.

New Role Permission:

Dashboard **>** "Edit Mine"
Turned On: Users will be able to edit Dashboards they created.
Turned off: Users will NOT be able to edit Dashboards they created.

Updated Role Permission Names:

Dashboard **>** "**Edit**"
    Turned On: Users will be able to edit any shared Dashboards created by other Users.
    Turned off: Users will NOT be able to edit any shared Dashboards created by other
            Users.

Dashboard **>** "**Delete Mine**"
    Turned On: Users will be able to delete the Dashboards they created.
    Turned off: Users will NOT be able to delete the Dashboards they created.

Dashboard **>** "**Delete**"
    Turned On: Users will be able to delete any shared Dashboards created by other Users.
    Turned off: Users will NOT be able to delete any shared Dashboards created by other
            Users.

How/Where: **Admin > User Permissions**

View User Dashboard Change History from the More Menu

Previously: If your Dashboards Domain is currently being Audited by the system, the system only
logged views/changes that were made to the administrative screens of dashboards, but not
views/changes to the dashboard itself.
Now: If your Dashboards Domain is currently being Audited by the system, the system now tracks
views/changes by all Users on these screens:
- **Dashboards** (views are tracked)
- **Dashboards > Edit Mode** (Changes to the Dashboard are tracked. For Example:
  add/edit/remove Widgets and changing to shared/private.)
- **Dashboards > More > More Dashboards** (views/edits are tracked)

The Audit history for a Dashboard can be viewed here: **Dashboards > More > Dashboard
Change History.**

*If you want your Dashboards to be audited, see your Origami Service Administrator to update
your system settings.*

Data Entry Events (DEEs)

Flag Email Notifications as High Priority

Previously: All emails sent via Data Entry Events (DEEs) were automatically set to regular priority. There was no way to mark emails as high priority.

Now: Use the new **Send as High Priority** checkbox on the **Email Event Actions** screen to mark all emails for this action as High Priority.

How/Where:

1. **Admin > Data Entry Events**
2. In the **Actions Triggered by Event** section, select New Action
3. From the **New Action** drop down list, select one of the following actions:
   - New Email
   - New Report
   - New Mail Merge (*will only be displayed if there are existing Mail Merge Templates*)
   - Grant External Access (*will only be displayed if there are existing External Access Types*)
   - New Abstract (*will only be displayed if available in your system*)
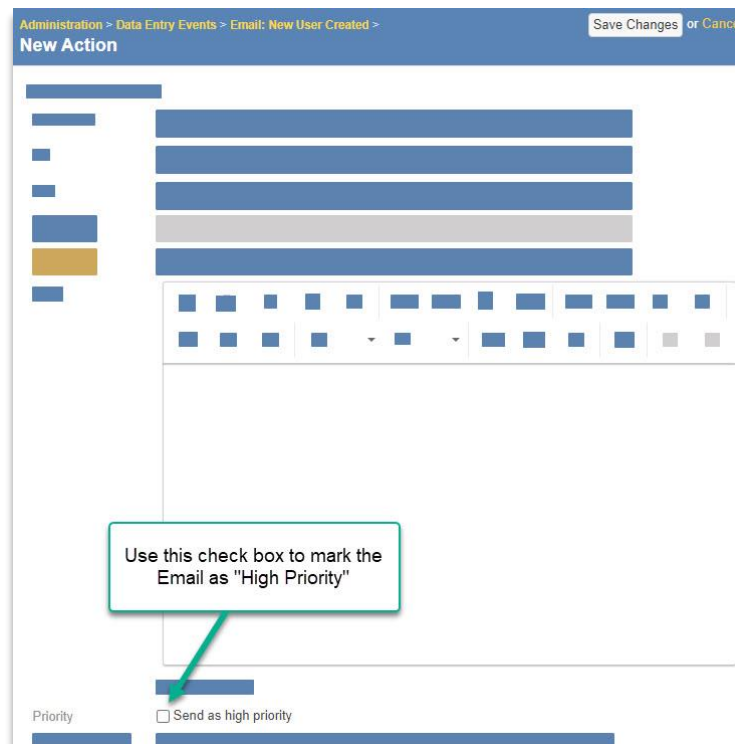
Data Import Center

Bulk Upload Conditional Review Assignments for a Location in the Data Import Center

Previously: This functionality was not available.

Now: You can now bulk upload a list of reviewers specific to locations using **the Review Rule Set Assignments** Template.

How/Where:

Admin > Data Import Center

The new template: **Review Rule Set Assignments** has been added to the **Additional Templates** menu.
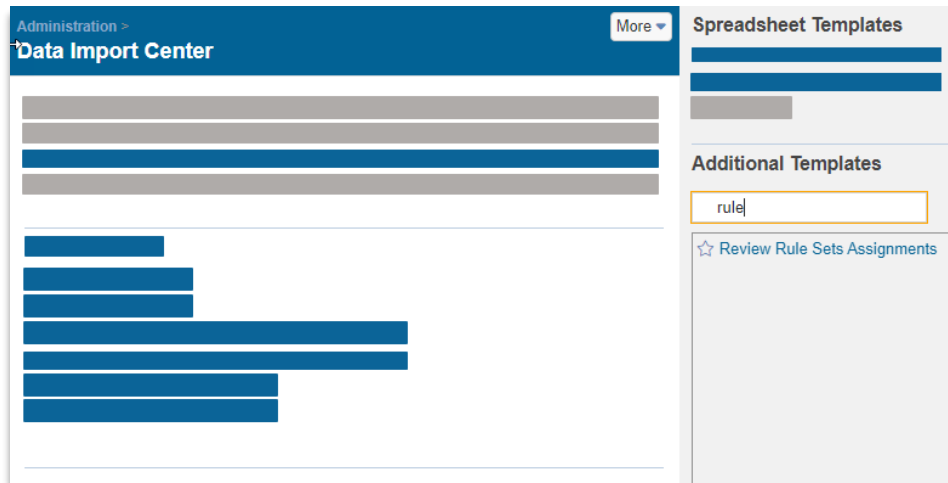
You can also Export Rule Set Definitions

1. **Admin > Rule Set Definitions >** Open a Review Rule Set
2. In the **Conditional Reviewers** section, click **All Assignments**.
3. In the **Review Rule Set Assignments** screen, click **More> Export in Data Import Center Format**
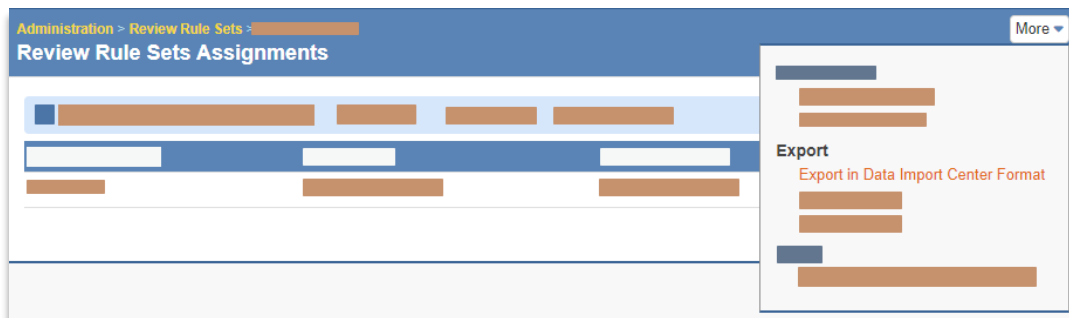
Document Controls
(AKA Policies and Procedures Management | PPM)

Edit File Access Schedules

Previously: After you created a File Access Schedule (that allows recurring file access) on Document Controls, you were unable to adjust the frequency or Users assignments.

Now: After you create the File Access Schedule, you can now adjust the Schedule and User assignments

How/Where:

Create a new Schedule: **Document Controls >** in the **File Access Schedule** section, click **New Schedule**

Edit an existing schedule: Document Controls **>** in the **File Access Schedule** section,
- o   click the Frequency to update the frequency, time and start / end dates.
- o   Click the Users to update User Assignments
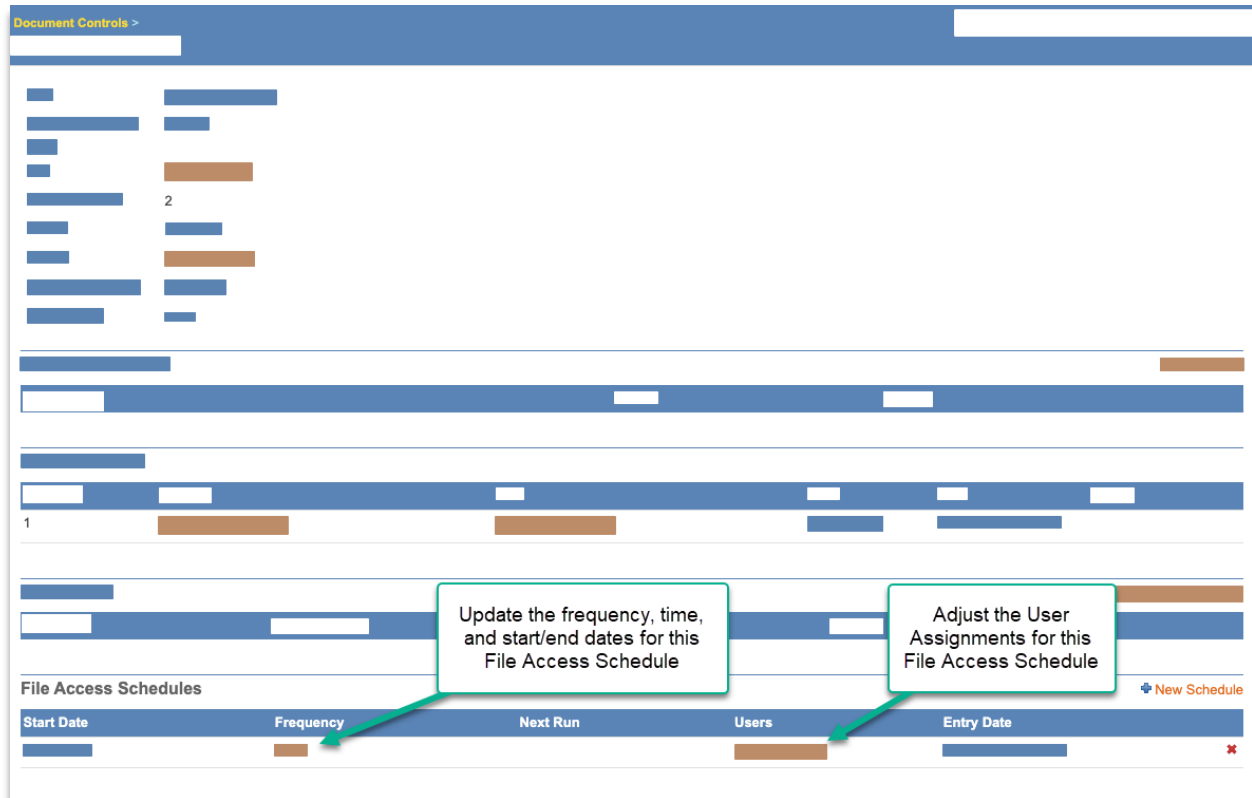
Document Controls screen

Edit the Frequency and Users on a File Access Schedule

Previously: When creating a recurring File Access Schedule, you were unable to edit the Frequency or users.

Now: You can now edit the Frequency and Users on a File Access Schedule.

How/Where:

Open a **Document Control** that has a schedule.

Modify the frequency of the schedule: In the **File Access Schedules** section, click the Frequency for the schedule you want to modify. You can now update the frequency and set start/end dates.

Modify the Users attached to the schedule: In the **File Access Schedules** section, click the Users for the schedule you want to modify. You can now add and remove Users as well as set an access duration.
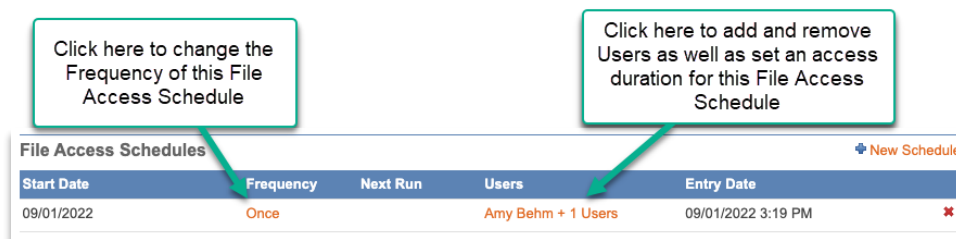
Improve workflow by assigning Teams to a Document Control

Previously: You could only assign Users manually to a Document Control.

Now: In order to facilitate the new PPM approval processes, you can now assign Teams to the following sections of a Document Control: **File Access**, **Repository Access**, and the new section: **Review Access**. Teams give you the ability to preconfigure and reuse a group of people for various tasks. See Teams for more information.

How/Where:
1. **Document Controls >** Open a **Document Control**
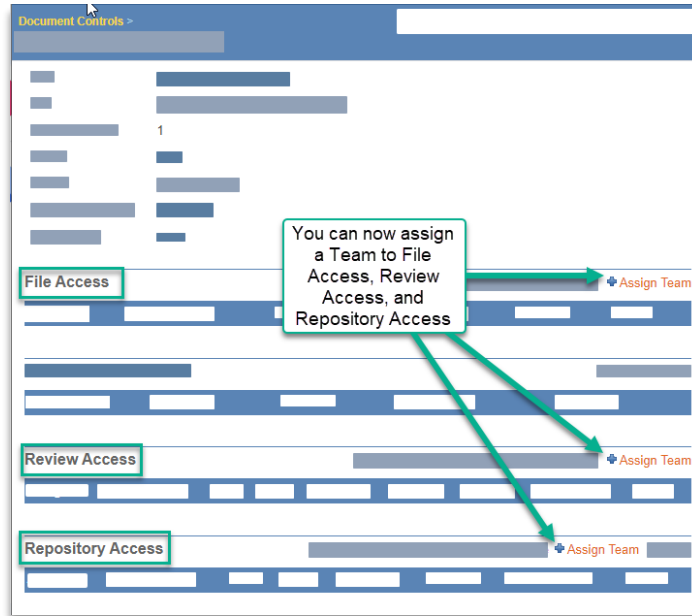
Document Controls Screen

If you don't see Assign Team, ask your System Administrator to update your permissions.
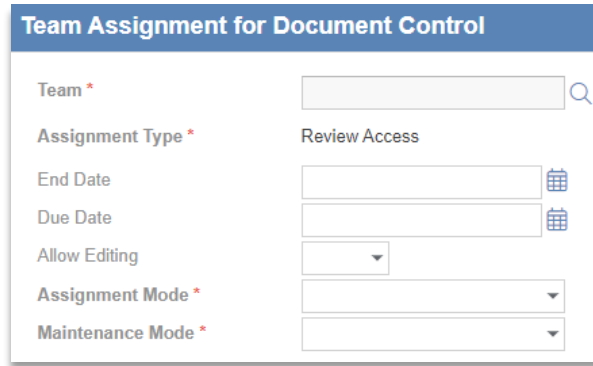
2. Click ✚Assign Team in any of these sections:

- For **File Access** (when the document is being created), this screen is displayed:
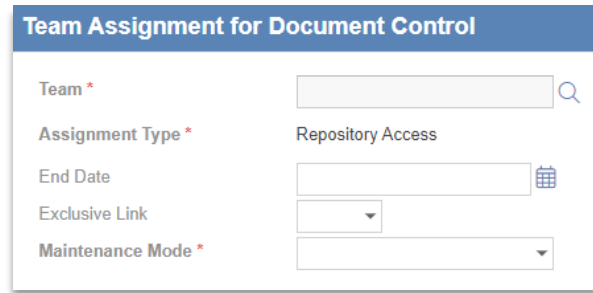
- For **Review access** (when the document is in the review process), this screen is displayed:

- For **Repository access*** (when the document is complete and in the Repository), this screen is displayed:

Team Assignment for Document Control Screen – Fields

The fields are slightly different for each screen, above.

- **Assignment Mode**:
  - o **Concurrent-** all Team Members have access to the Document Control at the same time.
  - o **Sequential:** (this feature currently is in progress)
- **Maintenance Mode**: Select how this team is updated
  - o **Manual**- For this Document Control, the members of this team can only change when manually added or deleted on the **Edit Team** screen.
  - o **Automatic**- For this Document Control, the members of this team are automatically updated based on the Team Maintenance Mode's Filter.
    - ▪ If the Team (on the **Edit Team** screen) DOES NOT have **Maintenance Mode:** "Auto-Filter" selected, no changes will be made to the team members.
    - ▪ If the Team (on the **Edit Team** screen) DOES have **Maintenance Mode:** "Auto-Filter" selected, the filter will auto-update the Team Members list whenever the filter produces different results.

      When a Team Member is no longer part of a Team, they will be removed from the PPM access assignment, if they are in Assigned or Sequence Pending Status (which means they have not completed their review.) If they

HAVE completed their review, they will not be removed from the Team for tracking purposes.

- **Allow Editing** (This field is only shown when assigning a team to **Review Access**)
  - **Yes**- Team Members will be able to edit the document.
  - **No**- Team Members will open a Read-Only Document.
- **Exclusive Link**: This field determines if you want the User to also see the other "open" documents in the Repository.
  - **Turned On**: The link will send the User to a "mini-repository" that only has access to the assigned Document Control.
  - **Turned Off**: The link will send the User to the full Repository which contains the assigned Document Control, all "open" documents, and any "exclusive" Documents that they have permission to see.

If Repository Access is "Open" (The Repository Access drop down list is on the **Edit Document controls screen), all Users can access this document. No assignments are necessary.*

Assign and track the Review Process of a Document Control

Previously: This functionality was not available.

Now: To facilitate the new PPM approval processes, you can now create a Review Process that tracks the document as it is being reviewed and finally posted.

How/Where: **Document Controls >** Open a Document Control (of which you are the owner or co-owner) **> Review Access** section.

Document Controls Screen

Use Search Filters when Assigning Multiple Users, Contacts, and Employees

Previously: When assigning multiple Users to a Document Control, it was difficult to select the Users when you had to manually scroll through the list of all Users in the system.   You also couldn't assign Contacts or Employees.

Now: When assigning multiple users to a Document Control, you can now use Search Filters to easily select your users from one of these sections: Users, Contacts, or Employees.

How/Where:

1. **Document Controls >** open a Document Control in which you are an owner (or co-owner)
    - In one of the sections: **Repository***, **File Access**, **Review Access**, or **File Access Schedules**, click ✚ Assign Multiple
2. On the next screen, click **Add Multiple**
3. The **Assignee Type Selection** screen is shown
    - Select the type of Assignee (Users, Contacts, or Employees or From Existing Team)
        - o **Users**: will show the **Users** Index
        - o **Contacts:** will show the **Contacts** Index
        - o **Employees:** will show the **Employees** Index
        - o **From Existing Team:** will show only the members of the Team you selected from the **Existing Team** drop down list
4. From one of these screens, use the search filters (*not available for "Existing Team"*) on the right to find your assignees quicker.
5. Select the Users/Contacts/Employees that need assigned, then click **Next.**

To use this feature, you will need access rights assigned for Users, Contacts, and Employees. If you don't have access, see your System Administrator to request access.

* The Repository section is only available when this Document Control has been published to the Repository.

Document Templates
(AKA Business Continuity Management | BCM)

Bulk assign multiple Elements of a Document Template to a User

Previously: You could not bulk assign elements on a Document Template for a User. Each Element needed to be assigned individually. This led to multiple emails for each assigned element.

Now: You can now bulk assign multiple Elements to a User at one time. When a User is assigned to multiple elements, they will only receive <u>one</u> email regarding the Document Template.

How/Where:

Document Templates > Open a Document Template

View Document Template Screen

Bulk assign Elements using Areas and Sections

1. In the **Areas** section, click ➕ Assign Elements
2. On the **Assign Elements** screen, this list shows you all the Areas and Sections where each Element belongs for this Document Template.
   a. Select the Elements to assign, then click **Next**
3. On the **Assign User** screen, select the User for these assignments.

Bulk Assign Elements using Sections

1. In the **Areas** section, click ✚ Assign Elements
2. On the **Assign Elements** screen, this list shows you all the Sections where each Element belongs for this Document Template.
    a. Select the Elements to assign, then click **Next**
3. On the **Assign User** screen, select the user for these assignments.

Bulk Assign Elements

1. In the **Areas** section, click ✚ Assign Elements
2. On the **Assign Elements** screen, this list shows all the Elements of this Document Template.
    a. Select the Elements to assign, then click **Next**
3. On the **Assign User** screen, select the user for these assignments.

Deactivate or Delete Document Templates

Previously: The only way to delete a Document Template was to remove every element, section and area manually first, then you could select **More > Delete**.
Now: You can now easily deactivate or delete a Document Template.
How/Where:

Document Templates > Open a Document Template **> More > Deactivate Document Template**
- Once deactivated, users cannot modify any aspects of the Document Template and all Published Files become unavailable (from the Document Templates "View" or "Index" page).

Document Templates > Open a Document Template **> More > Delete Document Template**
- When you delete the Document Template, all child domains (areas, sections, published files, elements, User Assignments, associated links, associated files, and exercises) and all *associated* child domains will be immediately deleted from the database.

Improve workflow by assigning Teams to a Document Template

Previously: You could only assign Users manually to a Document Template.
Now: In order to facilitate the new BCM approval processes, you can now assign Teams to the following sections of a Document Template: **Repository Access**, and the new section: **Review Access**. Teams give you the ability to preconfigure and reuse a group of people for various tasks. See Teams for more information.
How/Where:
1. **Document Templates >** Open a **Document Template**
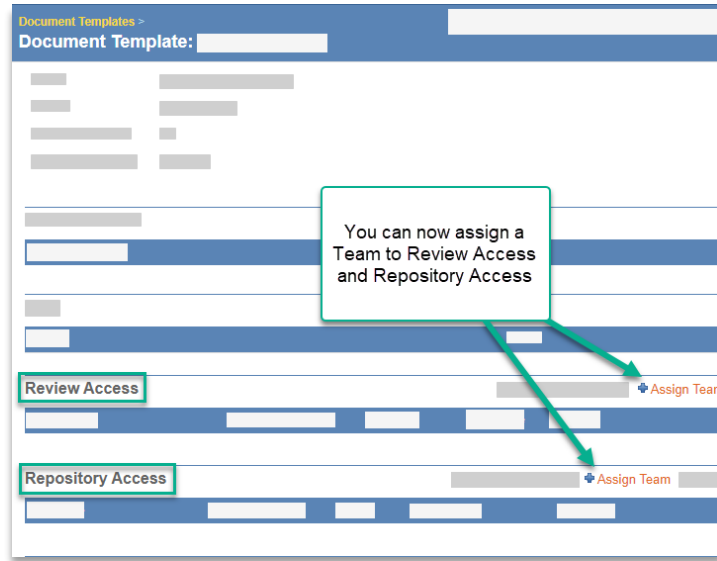
If you don't see Assign Team, ask your System Administrator to update your permissions.
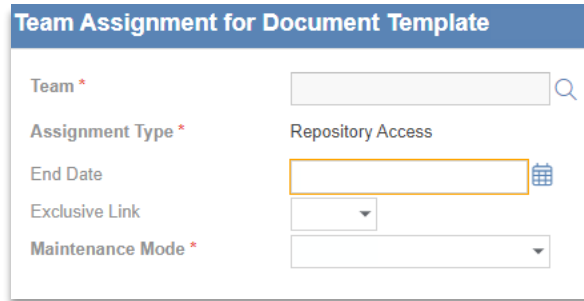
2. Click ✚ Assign Team in one of these sections:
   - For **Review access** (when the document is in the review process), this screen is displayed:

   - For **Repository access*** (when the document is complete and in the Repository), this screen is displayed:

Team Assignment for Document Template

Team *

Assignment Type *   Repository Access

End Date

Exclusive Link

Maintenance Mode *

Team Assignment for Document Control Screen – Fields

The fields are slightly different for both screens, above.

- **Assignment Mode**:
    - **Concurrent-** all Team Members have access to the Document Template at the same time.
    - **Sequential:** (this feature currently is in progress)
- **Maintenance Mode**: Select how this team is updated
    - **Manual-** For this Document Template, the members of this team can only change when manually added or deleted on the **Edit Team** screen.
    - **Automatic-** For this Document Template, the members of this team are automatically updated based on the Team Maintenance Mode's Filter.
        - If the Team (on the **Edit Team** screen) DOES NOT have **Maintenance Mode:** "Auto-Filter" selected, no changes will be made to the team members.
        - If the Team (on the **Edit Team** screen) DOES have **Maintenance Mode:** "Auto-Filter" selected, the filter will auto-update the Team Members list whenever the filter produces different results.

            If a Team Member is no longer part of a Team, they will be removed from the PPM access assignment as well, as long as they are in Assigned or Sequence Pending Status (they have not completed their review.) If they HAVE completed their review, they will not be removed from the Team for tracking purposes.

- **Exclusive Link**: This field determines if you want the User to also see the other "open" documents in the Repository.
    - **Turned On**: The link will send the User to a "mini-repository" that only has access to the assigned Document Template.
    - **Turned Off**: The link will send the User to the full Repository which contains the assigned Document Template, all "open" documents, and any "exclusive" Documents that they have permission to see.

If Repository Access is "Open" (The Repository Access drop down list is on the **Edit Document Templates screen), all Users can access this document. No assignments are necessary.*

Assign and track the Review Process of a Document Template

Previously: This functionality was not available.

Now: To facilitate the new BCM approval processes, you can now create a Review Process that tracks the document as it is being reviewed and finally posted.

How/Where: **Document Templates >** Open a Document Template (of which you are the owner or co-owner) **> Review Access** section.
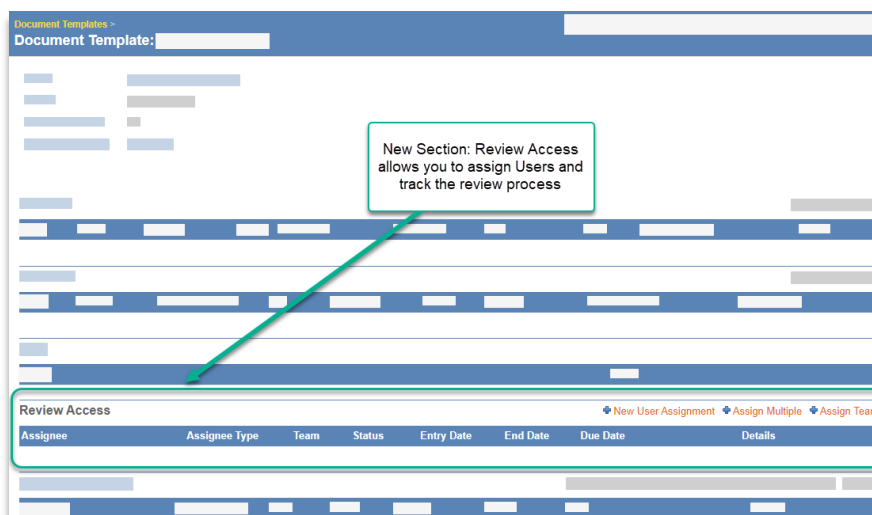
Document Template screen

Emails

Decide at the Domain Level if an Email should be secured or unsecured

Previously: You can determine if Emails are secured or unsecured for: all domains, no domains, or only in the Report Domain. (This is still true.)

Now: You can now also decide at the Domain level if an Email should be secured or unsecured.

To change how your emails are sent, see your Origami Service Administrator to update your settings.

Employee Health

Add Tasks to your Health records

Previously: This functionality was not available.

Now: You can now add tasks to build workflow.

How/Where:

1. **Employee Health > Health Records >** open an existing **Testing and Screening** record.
2. Use the **Open Tasks** section on the right to add Tasks.
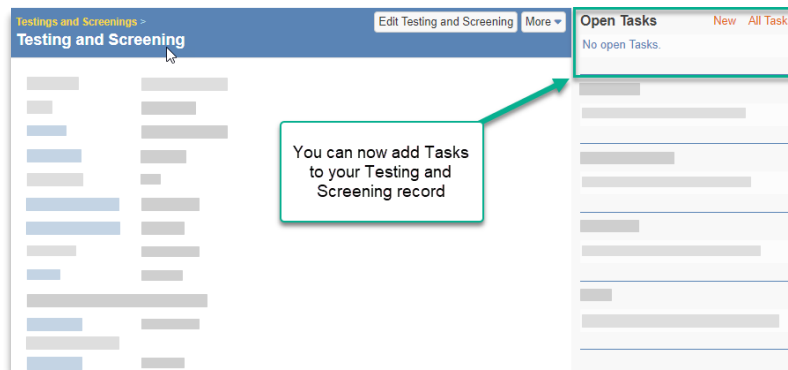
Add Proof of Vaccination Documentation

Previously: This functionality was not available.

Now: You can now upload documentation for Vaccination records.

How/Where:

1. **Employee Health > Vaccinations >** click the **New Vaccination Record** button.
2. Select the Vaccination Type.
3. Fill out the information, then click **Save Changes.**
4. Once the record is saved, click **Edit Vaccination Record**
5. In the **Proof of Vaccination** section, click **Upload file.**

Edit Vaccination Record for

1. Fill out the Vaccination Record, then save.

2. Re-open the record to add your Proof of Vaccination

Proof of Vaccination ➕ Upload File

File Name	Description	Folder	Date
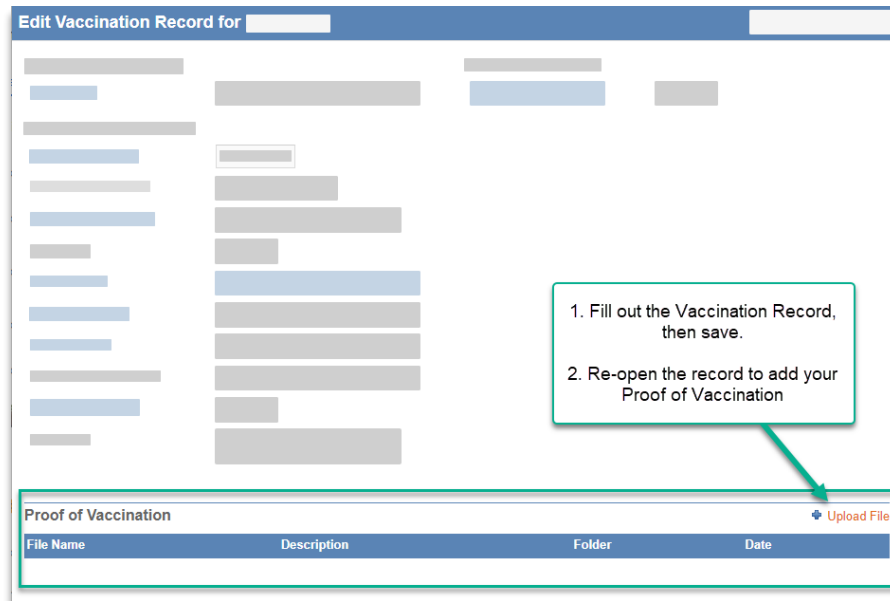
Add Secondary Testing Information to Employee's TB Testing record

Previously: This functionality was not available.

Now: You can now add secondary TB testing information for a TB Testing record.

How/Where:

1. **Employee Health > Health Records >** click the **New Testing and Screening** button
2. Select Type = "TB Testing"

The Secondary Testing section will be displayed when:

- **Type** = TB testing
- **Completed** = Yes
- **Result** = "Positive" or "Inconclusive"

- A new field was also added to the **Employees** screen in the **Testing and Screenings** section. The new **Final Results** field shows the final results of the initial and secondary TB testing results.

Employee Screen

Track COVID Vaccine Manufacturers in your COVID Testing Record

Previously: This functionality was not available.

Now: You can now setup a list of Covid vaccine manufacturers that can then be selected when adding a Covid Vaccine Testing record.

How/Where:

> **Setup: Employee Health > Vaccine Manufacturers**

> **Select the Manufacturer when adding a Covid Vaccine Testing Record:**
> 1. **Employee Health > Vaccinations > New Vaccination**
> 2. Select Type = "COVID Test"
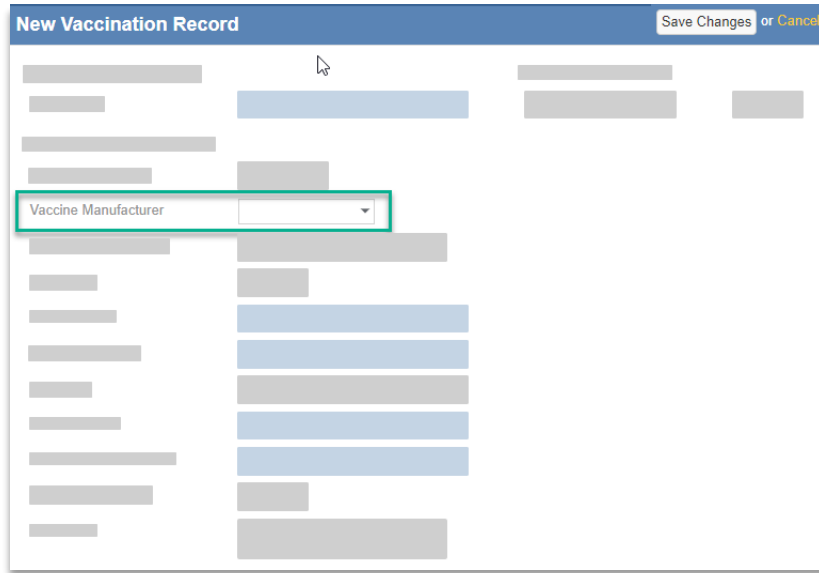
Track dosage information for Vaccinations

Previously: This functionality was not available.

Now: You can track the dosage information for a Vaccination.

New field/screen: "Shot Type" on the **New/Edit Vaccination Record** screen. This tracks whether the Vaccination is the Initial dose, Second Dose, or a Booster Dose.

How/Where:
1. **Employee Health > Vaccinations >** click the **New Vaccination Record** button.
2. Select the Vaccination Type.
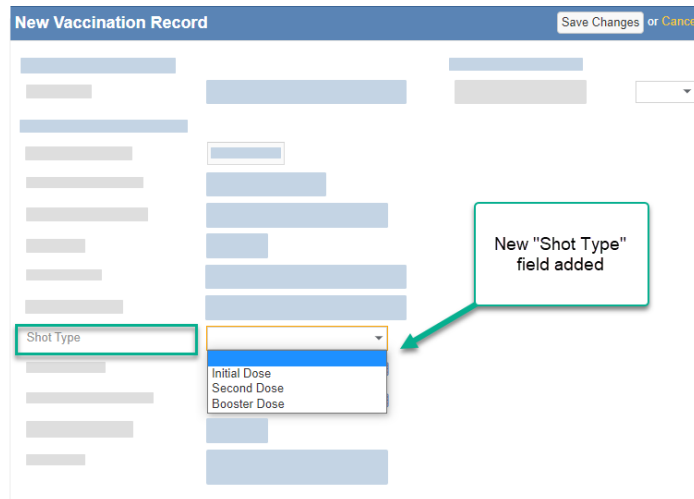
Waive a Vaccination Request

Previously: This functionality was not available.

Now: If an employee claims to be exempt from receiving a vaccination, you can now enter that information in the Vaccination form and upload document evidence of that waiver.

How/Where:

1. **Employee Health > Vaccinations >** click the **New Vaccination Record** button.
2. Select the Vaccination Type.
3. In the Waiver Information section, fill out the information, then click **Save Changes.**
4. Once the record is saved, click **Edit Vaccination Record**
5. In the **Proof of Waiver** section, click **Upload file.**
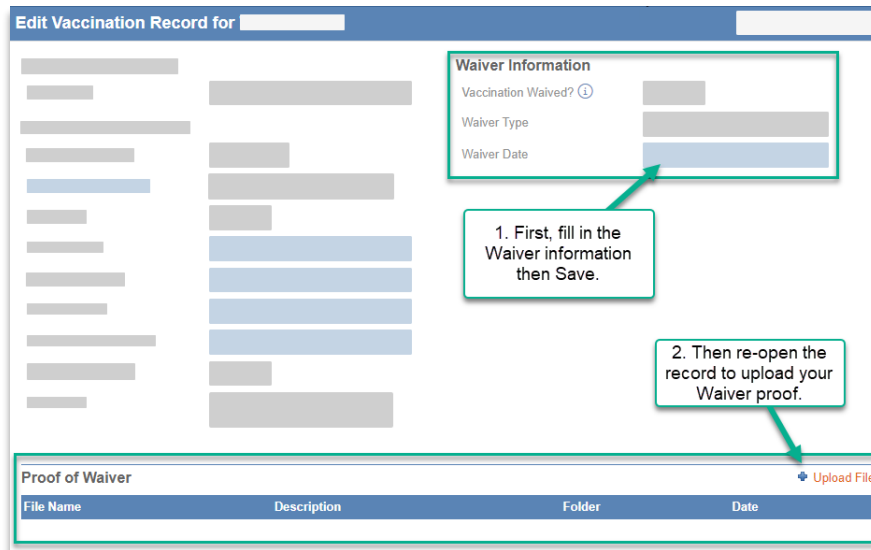
FTP Destinations

Improved encryption for FTP Destination User Names and Passwords

Now: We have improved the encryption method used for the User Name and Password fields for external FTP interfaces. This changes the way you will enter User Name and Password information for the FTP Destination.

How/Where:
1. **Admin > FTP Destinations**
2. Click the **Choose FTP Username/Password** Credentials
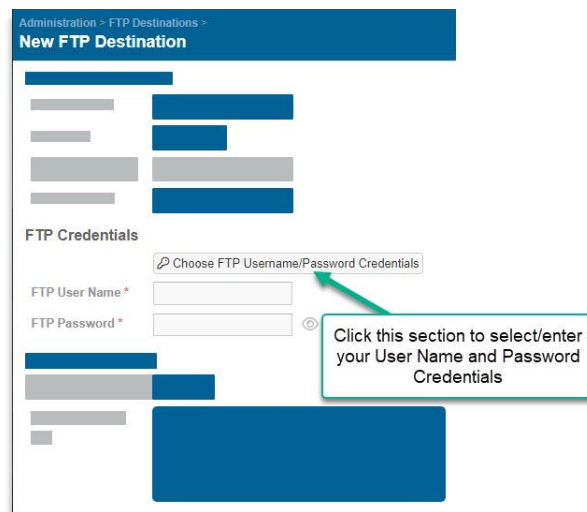
3. In the **Credentials** screen, select the Credential that contains the correct User Name/Password combination for the FTP Destination.
   a. If it's not in the list, select **Create New**
   b. Select the correct Credential Type, then click **Next**
   c. Fill in the information, then **Save Changes**.
4. Once the Credential is selected, the *Credential Token* will be displayed in the User Name and Password fields. Credential Tokens follow this format: `$CRED$[CredentialName]`

If you don't see this new functionality, ask your Origami Service Administrator to update your system settings so you can use this feature.

Name the Report file sent to an FTP Destination

Previously: When you scheduled reports to send to an FTP*, the system would auto-generate a generic file name that wasn't consistent.

Now: You can now specify a File Name when scheduling a Report or Report Package using **Send to:** "FTP Destination".

New Field: "Export File Name" on the **Schedule Report** screen.

- Enter the name / format to use when exporting this file.
- If you leave this field blank (not recommended), the system will automatically name the file using this format:

(First 18 characters of the Report name) + '_' + yyyMMdd + (an exceedingly long unique Identifier)

Example: When I export my report "Workers Compensation Claims Loss Run", and leave this field blank, the system will auto-generate this file name: "WorkersCompensati20220913b92f3232054c46e7be80a1bad85c317c.xlsx"

How/Where:
1. Reports **>** click **More > Add a Schedule**
2. In the **Send To:** field, select "FTP Destination" to show the new FTP Destination field.

To use this feature, you need to have at least 1 FTP Destination configured (Admin > FTP Destinations**) and the corresponding credentials to access the FTP Destination (**Admin > Credentials**)*

Healthcare Failure Mode and Effect Analysis (HFMEA)

HFMEA screen aligns to HFMEA standards

To better align to HFMEA standards, there are now seven new fields and six new sections.

Previously: This functionality was not available.

Now: Seven new fields and six new sections have been added to better align with HFMEA standards.

New Fields:

On the **New/Edit HFMEA** screen:

- The **Subject** field has been renamed: **HFMEA Topic** for clarity.
- **HFMEA Focus**
- **HFMEA Name**: This is an auto-generated from the "HFMEA Topic" and "Year" entered. This field is displayed after you save a new HFMEA.
- **Record Keeper**
- **Date Started**
- **Date Completed**
- **Affected Areas-** Turn this option on when all affected areas are represented.
- **Knowledge-** Turn this option on when diverse levels and types of knowledge are represented on the team.

How/Where: Open an existing HFMEA record
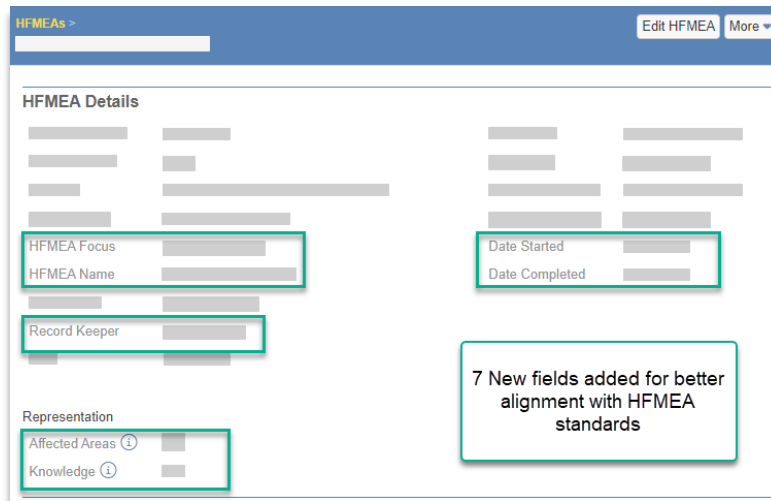
New Sections

HFMEA Hazard Analysis Section: Specify the failure modes and up to five effects for each given failure mode. You can also and enter additional information for the effects.

- Click **New HFMEA Failure Mode:**

Actions Section: Add actions for this HFMEA.

- Click **New HFMEA Action**

Assignment Section: Add the Individual team members that are working on the HFMEA

Team Assignments Section: Add the Teams that are working on the HFMEA.

Add a Fishbone Diagram to your HFMEA

Previously: This functionality was not available.
Now: you can now add a Fishbone Diagram to a HFMEA
How/Where:

Create a Fishbone Diagram

1. Open an existing HFMEA **> More > Create Fishbone Diagram**
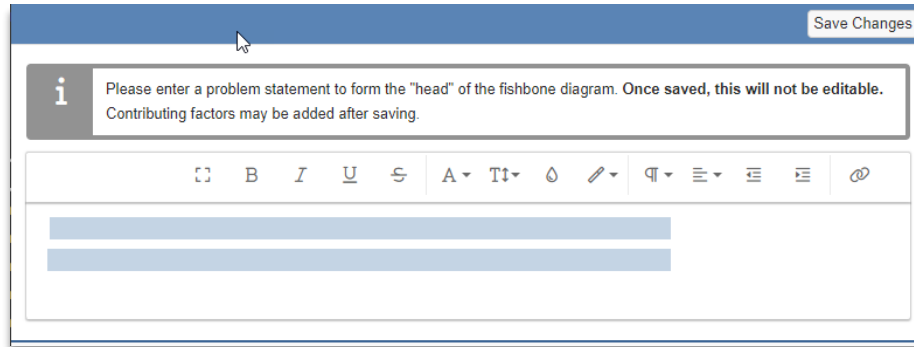
2. Enter a problem statement to form the "head" of the Fishbone Diagram.
    *   Double check your statement is correct. You won't be able to edit your statement after you Save**.**
3. When finished, **Save Changes**

Add a new RCA Contributing Factor to a Fishbone Diagram
1. Open a HFMEA that has a Fishbone Diagram.
2. In the Fishbone Diagram section:
    *   **Add**: to add a new RCA Contributing Factor
    *   **Expand**: This option shows all the information in the text fields.
    *   **Collapse**: This option limits what is shown in text fields for easier viewing.
3. Click **Add** and fill in the information.

Add a Workflow Diagram to your HFMEA

Previously: This functionality was not available.
Now: you can now create a Workflow Diagram for a HFMEA
How/Where: Open a **HFMEA >** In the **Workflow Causal Diagram** section, click **Edit Diagram**

Internal Audits

Assign a second Auditor and track their cost/time

Previously: You can assign a single Auditor to an Internal Audit Action (IAA). (This is still true.)

Now: You can now assign a second Auditor to an IAA as well as track their associated cost and time.

New Fields/Screens: On the **Assign Activity** and **Reassign Activity** screens:

> **Second Auditor** field: Assign this IAA to an additional Auditor.
>
> - Only <u>one</u> of the two Auditors needs to complete this IAA.
>
> **Second Auditor Time Spent** drop down list: Select the cost/time spent by the Second Auditor. (*The Cost Levels in this list are configured in the* **Cost and Time** *button on the main page of the Internal Audit Iteration.*)

How/Where:

1. Open an **Internal Audit Iteration**
2. In the **Milestones and Activities** Section, click Assign Activities or Assign or Reassign
3. On the **Bulk Action: Assign Actions – Activities** screen, select all the Activities you would like to assign to the same 1 or 2 auditors, then click **Next.**
4. On the **Assign Activity** (or **Reassign Activity**) screen, the Second Auditor fields are displayed.
   - When you assign any Auditors, the system automatically sends an email to the assignees (even if you assign them at different times).
   - With two Auditor assignments, either Auditor can complete the Audit.
   - The Auditor who completes the assignment can update the hours for BOTH auditors, if needed.

Job Safety Analysis (JSA)/ Lockout Tagout (LOTO)

Bulk Copy a JSA/LOTO to multiple Locations, Assets, or Vehicles

Previously: This feature was not available.

Now: You can now Bulk copy a particular JSA/LOTO for multiple Locations, Assets, or Vehicles. This will create a <u>new</u> JSA/LOTO record for the selected records.

How/Where:

> **Bulk copy a JSA Record**
> 1. From the Job Safety Analysis List, open a Job Safety Analysis Record
> 2. **More > Bulk Copy**
> 3. Fill in the fields on the **Bulk Copy Job Safety Analysis Records** screen
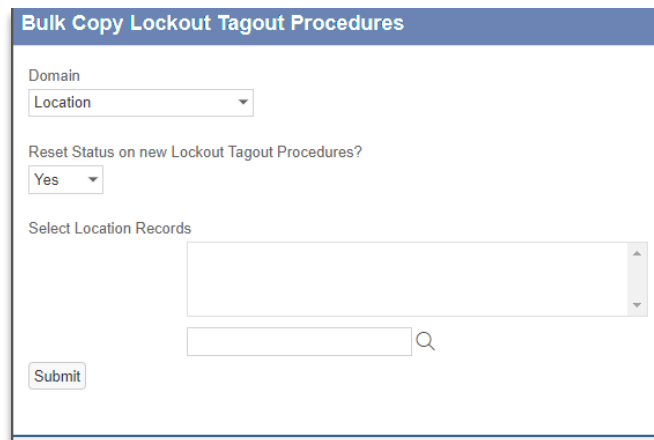
Bulk Copy Job Safety Analysis Records

Domain
Location

Reset Status on new Job Safety Analysis Records?
Yes

Select Location Records

Submit

- **Domain**: select the domain where you want this JSA copied. Your choices include Location, Asset, or Vehicle.

- **Reset Status on new Job Safety Analysis Records?**
  Yes: The status of the copied JSA will be set to "New"
  No: The status of the copied JSA will <u>not</u> change.
- **Select Location Records**: use the magnify glass to select the records that will get a copy of this JSA, then click **Done Selecting**.

4. When you are finished selecting the records, click **Submit**.
   - The JSA is now copied to all selected records.

Bulk Copy a LOTO Procedure

1. From the Lockout Tagout Procedures List, open a Lockout Tagout Procedure
2. **More > Bulk Copy**
3. Fill in the fields on the **Bulk Copy Lockout Tagout Procedures** screen

Bulk Copy Lockout Tagout Procedures

Domain
Location

Reset Status on new Lockout Tagout Procedures?
Yes

Select Location Records

Submit

- **Domain**: select the domain where you want this LOTO copied. Your choices include Location, Asset, or Vehicle.
- **Reset Status on new Lockout Tagout Procedures?**
  - **Yes**: The status of the copied LOTO will be set to "New"
  - **No**: The status of the copied LOTO will <u>not</u> change
- **Select Location Records**: use the magnify glass to select the records that will get a copy of this LOTO, then click **Done Selecting**.

4. When finished, click **Submit**.
   - The LOTO is now copied to all selected records.

Create a new JSA/LOTO from an existing record/procedure

Previously: This functionality was not available.
Now: You can now create a new JSA record/LOTO Procedure based on an existing JSA/LOTO.
How/Where:

For a JSA Record
1. Open a JSA Record
2. **More > Copy**
3. The system opens a new JSA record that is a duplicate of the original JSA Record.
4. Edit as needed, then **Save Changes**.

For a LOTO Procedure
1. Open a LOTO Procedure
2. **More > Copy**
3. The system opens a new LOTO Procedure that is a duplicate of the original LOTO Procedure.
4. Edit as needed, then **Save Changes**.

Loss Events

Create Multiple Claims from a Loss Event, a new Claim, or from an Occurrence or Loss Event from an anonymous Portal

Previously: You can create a muti-claim event using the multi-incident template. (This is still true.)
        You were unable to create a multi-claim event any other way.
Now: Multi-claim entry is now also available:
- When saving a new Loss Event
- When creating a New Claim
- from an occurrence or Loss Event entered through Origami's Anonymous Portal entry.

All three ways trigger the New Loss Event workflow.

You can select how many new claims are needed based upon the coverages available within the policy. There are some limitations in place to make sure multiple Claims of the same coverage are not created within a single claim (e.g., you cannot create multiple Collision or Comprehensive coverages within a single Loss Event).

Update Policy Coverages, Policy Limits, or Deductibles on a Loss Events

Previously: This functionality was not available.
Now: You can now update or add:
- Policy Coverages
- Policy Limits
- Deductible Amounts
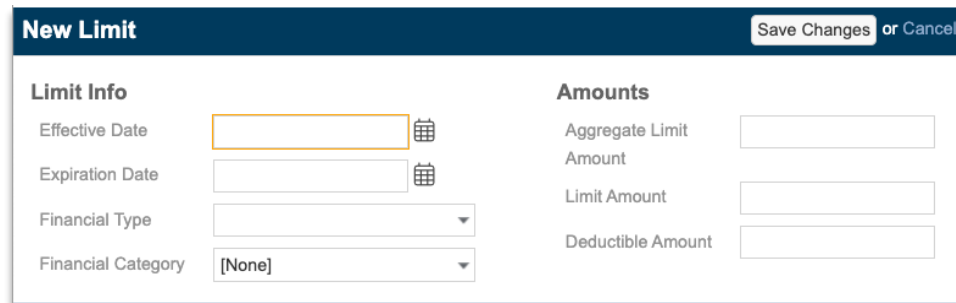
Edits only affect the Loss Event where the edits are completed.
User Access Needed: Users will need their permissions updated to use Policy Limits.
3. **Admin > Users >** Select the User
4. Grant access in the following section: **Limit**

How/Where:
1. Open a Loss Event
2. **More > New Limit**
3. Select the name of the applicable coverage
4. The **New Limit** screen is displayed.

5. Complete applicable fields for the coverage selected.

Mail Merge

"Other" Section improvements on the Mail Merge Template

Previously: On the Mail Merge Template screens, the **Other** section contained fields to collect WCPOLS information. These fields were listed the same on all three hierarchal levels of a Mail Merge Template: The Letter Template, the Letter Template Section, and the Letter Template Version.

Now: Several fields have been removed to clarify intended use. The "Other Version Identifier" field has been repurposed to work with the Bureau Central Repository (BCR), and the "Excluded from Statistical Reporting" has been renamed for clarity of intended use.

For **Letter Templates**, these fields were removed from the **Other** section since they do not apply:
- Reference Number
- Version Identifier
- Other Version Identifier
- Edition Number
- Exclude from Statistical Reporting

For **Letter Template Sections**: (where regulatory forms are typically implemented)
- The field: "Other Version Identifier" has been renamed to: "**Bureau Reference Number for Impact Analysis.**"
- The checkbox: "Exclude from Statistical Reporting" has been renamed to: "**Does Not Print on the Schedule of Forms.**"
  - Select this checkbox when you don't want this Letter Template Section or any corresponding versions to print on the Schedule of Forms. This typically applies to applications, policyholder notices, and other documentations that are not part of the endorsements given to the named insured for their proof of coverage.
  - For Workers Compensation, selecting this checkbox indicates that the Letter Template Section and any corresponding versions will not get reported for WCPOLS (Workers Compensation Policy Reporting).

For **Letter Template Versions**: (where Endorsements and Workers Compensation forms are typically implemented)
- The field: "Other Version Identifier" has been removed.
- The checkbox: "Exclude from Statistical Reporting" has been renamed to: "**Does Not Print on the Schedule of Forms**." (See the section above for a description of this checkbox)

How to access each section:

Letter Template: **Admin > Mail Merge Templates >** click **New Letter Template**
Letter Template Section**:**

1. **Admin > Mail Merge Templates > New Letter Template**
   - Select the file mode: **Book of Files**
2. Click **New Letter Template Section**

Letter Template Version:
1. **Admin > Mail Merge Templates > New Letter Template**
   - Select the file mode: **Book of Files**
   - In the **Template Document** section, turn on the **Always use Versions?** checkbox
2. Click **New Letter Template Section**
3. Click **New Letter Template Version**

Use three new Mail Merge Tags to easily pull Images into your Mail Merge Letter Template

Previously: You can pull Images into your Mail Merge Letter Template using the `AttachedImage` tag. (This is still true.) However, if you had complex audit Mail Merges, you needed help from an Origami Service Representative to pull the images.

Now: You can now use three new Mail Merge tags to easily pull images attached to records into your Mail Merge Letter Template.
   - `ALLIMAGES` pulls up to 10 images associated with a record.
   - `PrimaryImage()` pulls the most recently modified image associated with the record.
   - `CorrectiveImage` pulls the most recently modified image from the most recently modified corrective action that is associated with the Audit Question.

You can still use the following tag:

   - `AttachedImage(filter,mostrecent)` pulls an attached image to a record.

How/Where: See detailed instructions in the **Help on Merge Fields** Mini Guide (in the Mini-Help Guide list, above.)

Patient Visits

Rename this Domain throughout the system

Previously: This functionality was not available.
Now: You can now rename this domain from the original domain name: "Patient Visits" to your own, custom name. Once changed, all references for "Patient Visits" (in the top menu structure and on screens) will be changed to your custom name.
How/Where: **Admin > Domain Name Override**

Policies

Automatically create Policy changes for new Schedule items added to Pending Renewals

Previously: When you update a pending Renewal to add a new schedule item for the entire renewal term, a change is created to the existing renewal only. (This is still possible.)

Now: When you update a pending Renewal to add a new schedule item for the entire renewal term, you now have the option to automatically create a Policy change to the In-Force policy which reflects the newly added schedule item.

New Fields/screens: "Apply to In Force Policy?" checkbox on the **New Schedule** screen
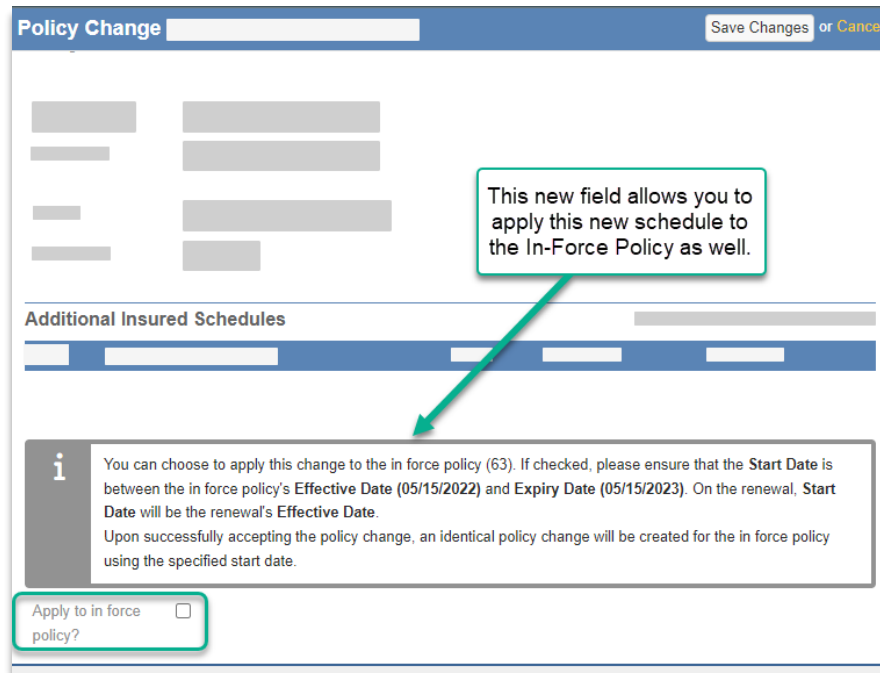
- **Turned On:** After the renewal transaction is bound, a policy change will be created for the In-Force Policy. This Policy change will have the New Schedule Item on it. The effective date of the policy change will be equal to the add date of the schedule item.
- **Turned Off**: The newly added schedule item is added to the Renewal and no changes are created for the In-Force Policy.

How/Where:

1. Open a pending Renewal.
2. **More > Policy Changes**
3. On the **Policy Changes** screen, click **New Change**
4. **On the Select the Type of Change** screen, create a schedule change to the Policy.
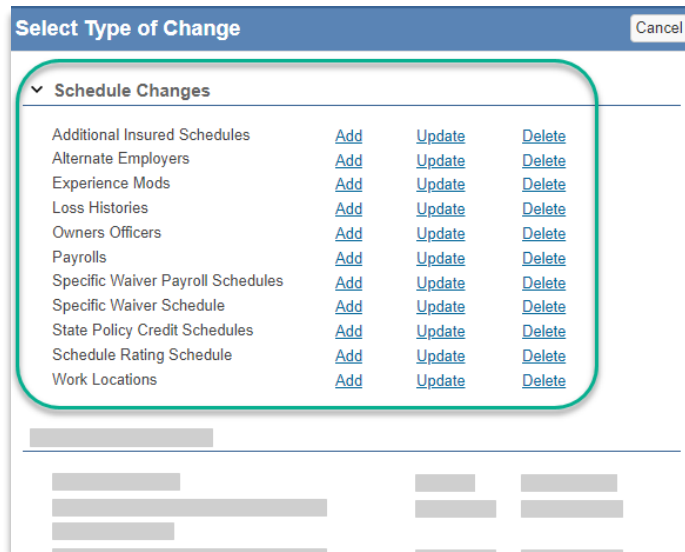
5. On the next screen, fill in the information, then scroll to the bottom. Turn on the **Apply to in force** policy checkbox.

*For the new schedule to apply to the In-Force Policy, the **Start Date** must be between the In-Force Policy's **Effective Date** and **Expiry Date.***

6. Click **Save Changes** to return to the **Policy Changes** screen.
7. When you are ready to complete the update to the renewal transaction, click **Accept Change**.
    - The Policy change is now automatically created to add the schedule item to the In-Force Policy.
    - An identical Policy change will be created for the In-Force Policy using the specified **Add Date** as the Effective Date**.**

Create Write-Off Rules

Previously: policies that needed Written Off had to be done manually for each one. This allowed you to write-off the policy premium on the selected policy.

Now: You can now create Auto Write-Off rules. You can setup multiple Write-Off Rules to define threshold amount and filter on policies, coverages, and members. The auto write-off will run as a nightly process and write-off the policy amount on all the policies which are filtered by the Write-Off Rules.

User Access Needed: Users will need their permissions updated to use Write-Off Rules. (**Admin > Roles > Manage Write-Off Rules**)

How/Where:
1. **Admin > Write-Off Rules**

2. Set up the details for write-off, then **Save Write-Off Rule**.
3. The nightly service will select the policies which match the rules and write-off the premium amount by creating a write-off record for each policy.

Rating Programs

Apply Underwriting Rules to all Policy changes

Previously: Underwriting Rules are only enforced on premium bearing Policy changes. (This can still be true.) You were unable to enforce Underwriting Rules on non-premium bearing Policy changes.

Now: You now have the option to apply your Underwriting Rules to all Policy changes.

New fields/screens: "Enable Underwriting Rules for all Policy Changes" on the **Edit Rating Program** screen.

> **Yes**: When there is a Policy change, the system will require an endorsement on every policy.
>
> **No**: When there is a Policy change, the system will require an endorsement on premium-bearing policies only.

How/Where:
1. **Admin > Rating Programs >** Open a Rating Program >click **Edit Rating Program**
2. Scroll down to the **Underwriting Rules** section to see the new "Enable Underwriting Rules for all Policy Changes" drop down list.

Reports

User Edit and Delete Permissions renamed for clarity

Previously: The Report Edit and Delete Permissions were: "Edit", "Edit Public", "Delete", and "Delete Public".

Now: Edit and Delete permissions have been renamed for clarity and consistency.
- Edit is now "Edit Mine"
- Edit Public is now "Edit"
- Delete is now "Delete Mine"
- Delete Public is now "Delete"

Updated Role Permission Names:
Report **>** "**Edit Mine**"
   Turned On: Users will be able to edit the Reports they created.
   Turned off: Users will NOT be able to edit the Reports they created.

Report **>** "**Edit"**
   Turned On: Users will be able to edit any shared Reports.
   Turned off: Users will NOT be able to edit any shared Reports.

Report **>** "**Delete Mine**"
   Turned On: Users will be able to delete the Reports they created.
   Turned off: Users will NOT be able to delete the Reports they created.

Report **>** "**Delete**"
   Turned On: Users will be able to delete any shared Reports.
   Turned off: Users will NOT be able to delete any shared Reports.

Teams

Easily select/maintain Team Member Lists, Assign Team Types, and add Members that aren't in the system

Previously: You could only select Team Members one at a time, and they had to already be in the system. There was no functionality to add Team Types.

Now: You now have additional options to select Team Members with a one-time Filter or an Auto-filter. You can also assign a user-defined Team Type and add Team Members that aren't currently in the system.
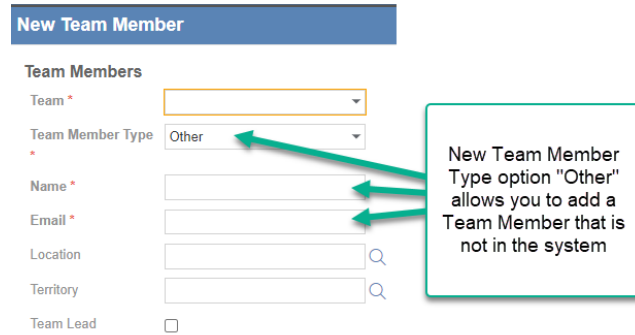
New Fields / Screens:
1. On the **New/Edit Team** Screen:

New Team

Teaml Details

Team Name *

Team Type

Use this new field to select a user-defined Team Type.

Team Description

Active Date   09/30/2022

Inactive Date

Location

Territory

Use this new drop down list to decide how the Team Members are selected and updated

Is Inactive   No

Team Maintenance

Mode *   Manual
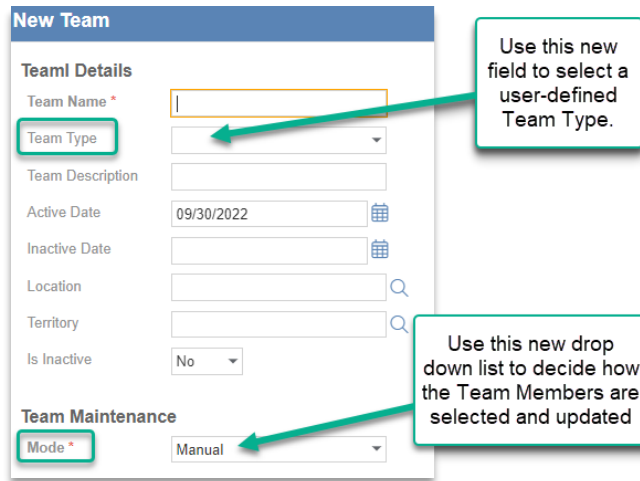
- o **Team Type** drop down list. Select a Type for this team.
  - o This list is user configurable. (*Update the items in this list here: **Admin > Code Tables > Team Types**)*
  - o You can create Data Entry Events or Filters based on the Team Type.
- o **Maintenance Mode** drop down list. This decides how the Team Members are selected and updated.
  - o **Manual**- to add your Team Members one at a time, from any of these types: Contacts, Employees, Users, and Unnamed Users. Once you save the team, select **Add Team Member** (from the **Team Members** section). You will need to manually update your team members list, when necessary.
  - o **Filter**- to add your Team Members with a <u>one- time</u> filter on Contacts, Employees and/or Users. If you return to this Team record later, click **Edit,** and then **Save**, the filter will update the Team Members based on the filter criteria. If you do not run the filter again, the Team Members will remain the same.
  - o **Auto-Filter**- to add your Team Members with an <u>automatic</u> filter on Contacts, Employees and/or Users. This filter will auto-update* the Team Members list whenever the filter produces different results.
    - **Example:** You have a filter for: Active Employees in the Service Department.   When this filter is scheduled to run again, any new Active Service Employees will be automatically added to the Team, while any Service Employees newly marked Inactive will be automatically removed from the team.
    - **This is a scheduled process and won't update the members instantly.*

2. On the **New/Edit Teams Member** Screen:

New Team Member

Team Members

Team *	[▼]
Team Member Type *	Other [▼]
Name *	[ ]
Email *	[ ]
Location	[🔍]
Territory	[🔍]
Team Lead	☐

New Team Member Type option "Other" allows you to add a Team Member that is not in the system

- **Team Member Type**: "Other" is a new option. This allows you to add a user that is not currently in the system as an Employee, Contact, or User.

How: Teams give you the ability to preconfigure and reuse a group of people for various tasks. You can use Teams in Document Controls, Document Templates, Safety Meetings, Safety Huddles, and more.

Add Team Members with a Filter

1. Open your **Teams** List. (Navigate to: (YourCurrentURL)/Origami/Teams)
2. Click **New Team**. On the **New Team** screen:
   - **Maintenance Mode:** select "Filter" or "Auto Filter".
   - Create your Team Members filter, then **Save Changes**
3. Those members matching the filter are now be displayed in the **Team Members** Section.

Add ALL Team Members Manually

1. Open your **Teams** List. (Navigate to: (YourCurrentURL)/Origami/Teams)
2. Click **New Team**. On the **New Team** screen:
   - **Maintenance Mode:** select "Manual"
   - When finished, click **Save Changes**.
3. On the Team screen:
   - Click **Add Team Member** to add your members.

*Members added with the **Add Team Member** option will never be affected by a Filter and can only be removed manually.*

Manually add Team Members to an existing Team

1. Open your **Teams** List. (Navigate to: (YourCurrentURL)/Origami/Teams)
2. Open the **Team**. On the **Team** screen:
   - Click **Add Team Member** to add your members.

*Members added with the **Add Team Member** option will never be affected by a Filter and can only be removed manually.*

Assign Teams to Document Controls (PPM) and Document Templates (BCM)

See these sections: **Document Controls** and **Document Templates** for more information.

Value Collections

Bulk delete Value Collection Assignments

> **Previously**: This feature was unavailable.
> **Now**: You can now bulk delete Value Collection Assignments.
>
> **User Access Needed**: Users will need "Bulk Action – Delete" permissions granted to use this new
> functionality.
> 4. **Admin > Users >** Select the User
> 5. Search for: **Value Collection Assignment** (with **"only Apply Filter to Area Names"**
> selected)
> 6. Update this permission: "Bulk Action – Delete"
>
> **How/Where**:
> 1. **Admin > Value Collections >** Open A Value Collection
> 2. In the **Values Intake Assignments** section, click **All Assignments**
> 3. **More > Delete Assignments**
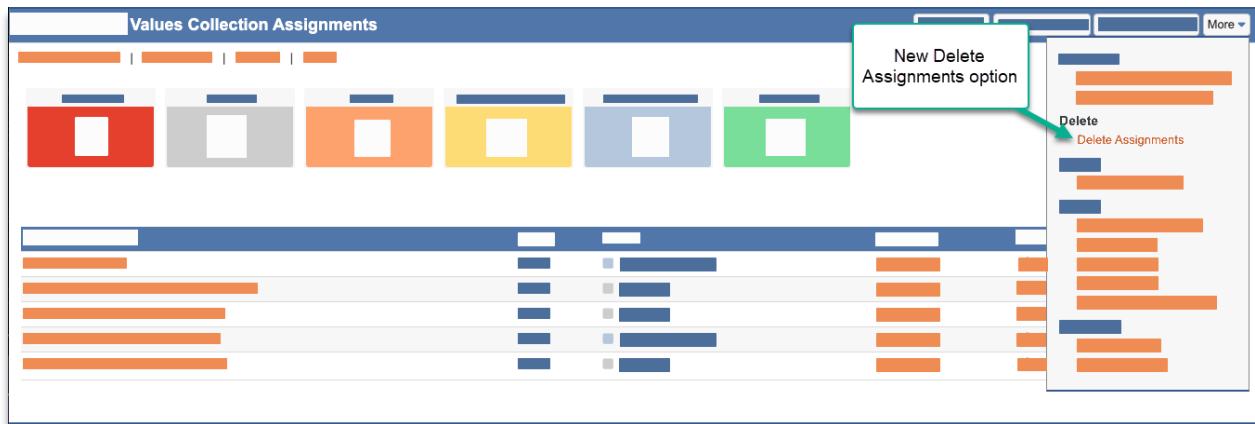
"My Notifications" Widget now shows Value Collections ready for your Review

> **Previously**: In the "My Notifications" Widget, when you selected "Include Value Collection", it
> would only display links to "Assignee" Assignments (assigned to you), not "Reviewer"
> assignments ("Ready for Review").

Now: In the "My Notifications" Widget, when you selected "Include Values Collection", it will now show you all "Assignee" and "Reviewer" Value Collection Assignments.

How/Where:

Setup: Dashboards > Edit Dashboard > New Widget > select **My Notifications Widget**
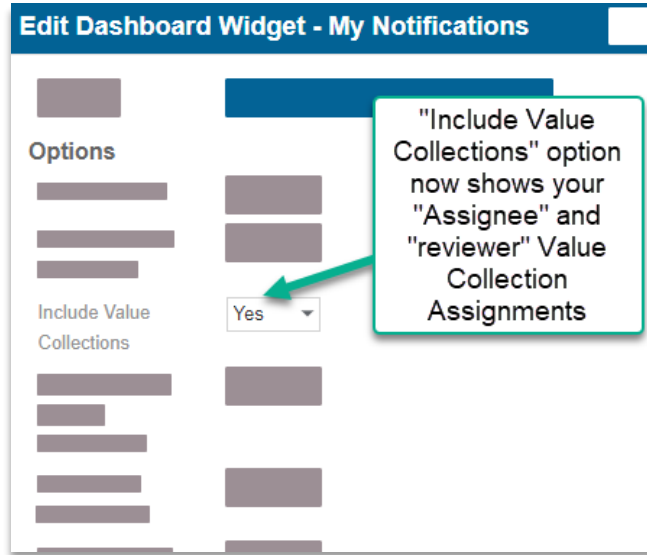
On your Dashboard: You can differentiate the 2 assignments by the text in parenthesis (Assignee Form) or (Reviewer Form).

Use advanced searches and Save Views on your Values Collections

Previously: On the Value Collections screen, you were only able to search on the **Name** field.

Now: You can now perform advanced searches and save Custom Views for Value Collections.

How/Where: **Admin > Values Collections**

Fixed

Audits

Data Entry Events now work when creating a new Audit from the More Menu that uses the "Can Assign Separately" option

Previously: When you created an Audit from the More menu in a related Domain, the associated DEEs did not start if you had "Can Assign Separately" activated on the selected Audit Definition. The workaround was to click "Save as Draft" first.

Now: When you create an Audit from the More menu in a related Domain, all associated DEEs will automatically start (even if you have "Can Assign Separately" activated.)

Example: You want to run an Audit Definition that sends your new Employee the "New Employee Handbook".

1. Open the **Employee** Record.
2. From the **More** menu, select the **Audit Definition** (for this example, it's called: "Send New Employee Handbook")
3. Once the "Send New Employee Handbook" Audit Definition is created, the system automatically runs any DEEs associated with that Audit Definition. For example:
   a. Send New Employee Handbook to this Employee via their work email
   b. Capture their signature to complete this Employee task

Claims

You can no longer add an Involved Party that is already attached to a Loss Event or Claim

Previously: You were able to add the same Involved Party more than once to the same Loss Event or Claim.

Now: When you attempt to add the same Involved Party to a Loss Event or Claim, the system searches several fields to verify the Involved Party is not already attached. These fields include:

- Address
- Phone
- Social Security Number
- Driver's License Number

If the Involved Party is already attached to this Loss Event or Claim, you will not be able to add it again. You will receive the error: "Please correct the following records. Duplicate Record Found."

Payments

You can no longer delete an Involved Party Payee that has transactions

Previously: You were able to delete an Involved Party that was marked as a Payee and had transactions. You could also move an Involved Party from Payee to Non-Payee when there was an existing transaction.

Now: You no longer have the option to delete an Involved Party if they have transactions. You will also receive an error if you attempt to change a Payee to a Non-Payee if they have existing transactions such as Payments or Check Payments.

Error Message: "This involved party has existing transactions and/or checks and cannot be marked as a non-payee."

Policies

Manual Commission adjustments are included in the Nightly process

Previously: When you create a commission adjustment using the **Policy Commissions** form, the total commission is adjusted by the manual adjustment. (This is still true.) However, when the checks were created, the manual adjustments were not being considered.

Now: Commission checks now include any manual commission adjustments (positive or negative). You can create as many adjustments, both positive and negative amounts as you like.

How/Where:

The Manual Commission Adjustment Process:

1. Open the **Policy**.
2. Select **More > Policy Commissions**.
3. On the **Policy Commissions** screen select **Add Adjustment**.
4. On the **New Policy Commission** screen, enter the adjustment amount and additional details
5. Save your changes.
6. A new Payable Adjustment Type record is created.
7. The Checks module will retrieve this adjustment check on its due date and create a check.