



ORIGAMI RISK

July 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.

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What's New

New Modules

Employee Health Solution

Why: Employee Health Managers need the ability to easily monitor the compliance of relevant health testing and vaccination records for all their employees.

Previously: This could only be accomplished with custom configurations.

New Solution:

Employee Health contains Two Modules

Health Record Module

- In the **Health Record Module**, you can create various types of health records (for example, drug testing, respirator fit testing, physical examinations, vision assessments, etc.)

Vaccination Record Module

- In the **Vaccination Records Module**, you can create various types of vaccination records (for example, COVID-19, Hepatitis-B, etc.)

Security Through Access Groups

You can customize access groups for each record type, in each Module, including user-created record types to ensure the security of sensitive health data.

Solution is great for Occupational Health Programs

This solution complements occupational health programs, allowing EHS or HR managers to track and manage employee health requirements, like pre-employment testing or post-incident surveillance.

External Events Solution

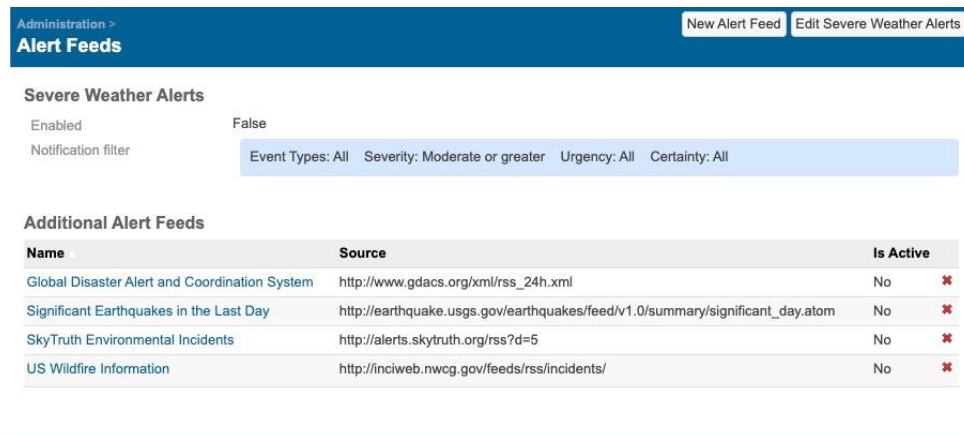
Why: This new solution offers Reporting, Exporting and Data Entry Events for External Alert Feeds like "US Severe Weather Alerts", "Global Disaster Alert and Coordination System" and others.





Previously: These external Alert Feeds were shown separately in **Admin>Severe Weather Alerts** and **Admin>Additional Weather Alerts**. You could not combine the maps. Also, since we did not save any data from these feeds, you could not create any Data Entry Events and Reports or export the data.

New Solution:

There is now one central area to manage all your External Event Feeds: **Admin>Alert Feeds**. You can now use all the features and functionality that exist in other areas of Origami, making these data points more actionable and providing greater insights.

The flexibility of the notifications and ability to configure filters as you would in other areas of Origami ensures that the right users are notified, the right workflows triggered, and the right reporting available - both before and after severe weather events, wildfires, earthquakes, etc.



Name	Source	Is Active
Global Disaster Alert and Coordination System	http://www.gdacs.org/xml/rss_24h.xml	No 
Significant Earthquakes in the Last Day	http://earthquake.usgs.gov/earthquakes/feed/v1.0/summary/significant_day.atom	No 
SkyTruth Environmental Incidents	http://alerts.skytruth.org/rss?d=5	No 
US Wildfire Information	http://inciweb.nwcg.gov/feeds/rss/incidents/	No 

- Create a single map that combines all Alert Feeds (Viewed here: **Locations>More>All Alerts Combined Maps**)
- Since all data from the Feeds and Maps are now stored in the system, you can now:
 - Configure notifications through Data Entry Events
 - Create Reports using this stored data
 - Show Maps on your Dashboard (Include External Events as a data layer on GIS maps)
 - Export Report Data (**Reports>More**) and Combined Map Data (**Locations>More>Combined Map>More>Export ActiveAlerts**)

User Access Needed

To use the reporting capabilities, you must grant access to Users for this new Module.

- **Admin> Users and Security**
- Grant access in the following section: **External Events**

Chemicals Solution (Future Solution)

We will soon have a Chemicals Solution in Origami Risk!

Previously: There was no standard solution in Origami Risk to manage your Chemicals. This could only be accomplished using customizations.

Now: We are working on standardizing this solution. Once finished, you will be able to manage your Chemicals, their ingredients, and the documents (like Safety Data Sheets) associated with them.

Associations

Add Contact Associations from outside the Contacts Section

Previously: You could only view and associate Contacts for certain Domains (from within the Contacts section).

Now: Contacts has now been added to the **More>Associations** menu for all Domains that use Associations.

Example using Claims: Open up an existing Claim, click **More>Contacts**. Select the Contact(s) you want to associate with this Claim.

Associate Documents with Locations

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

Now: You can associate Documents to a Location in two places: Document Controls and Locations. 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 Location.)

How/Where:

In Document Controls

- **Document Controls>View Form>**in the **Locations** section, click **Manage Associated Locations** OR click **More>Locations**.
- Select all Locations associated to this document, then click **Done Selecting**.

Sunburst Chart: **Document Controls>View Form>**click the **Connections** button to see the Sunburst Chart for this Document. (The Connections button is not visible if there are no connections)

In Locations

- **Locations>View Form>**in the **Document Controls** section, click **Manage associated Document Controls** OR click **More>Document Controls**
- Select all Documents associated to this Location, then click **Done Selecting**.

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

Associate Documents with Risk Indicators

Previously: You were unable to track which Documents relate to which Risk Indicators

Now: You can associate Documents to a Risk Indicator in two places: Document Controls and Risk Indicators.

How/Where: in Risk Indicator and Document Control Records

1. Open a Risk Indicator or a Document (**Document Controls>View Form**)
2. Click **More>Indicators** or **Document Controls**.



3. Make appropriate selections and click **Done Selecting**.

Associate Governances with Audit Definition Questions

Previously: You were unable to track which Audit Question was relate to which Governance.

Now: You can associate Audit Questions to a Governance in two places: Audit Questions and Governances. 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 Chemical.)

How/Where:

In Audit Questions

1. **Admin>Audit Definitions**>Open an Audit Definition
2. In the **Questions** section, open an Audit Question (or create a new one and **Save**).
3. Then click **More>Governances**.
4. Select all Governances associated with this question, then click **Done Selecting**.

Sunburst Chart: **Audit Definition**>open an Audit Definition>click the **Connections** button to see the Sunburst Chart of all associations for this Document. (The Connections button is not visible if there are no connections)

In Governances

1. **Governances**>open a **Governance** (or create a new one and **Save**).
2. Click **More**>**Audit Questions**
3. Select all Audit Questions associated with this Governance, then click **Done Selecting**.

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

Audits

New Attestation functionality

Previously: There was no core functionality to manage an Attestation workflow.

Now: You can now create and manage your Attestation workflow using Audit Definitions and Documents from Document Controls.

Attestation is a confirmation that something has been read, accepted, understood, and/or agreed upon.

Example: You can use Attestation to create a workflow where 1) you assign an Attestation Record to your new employee 2) they view the Attestation Record and electronically sign the Employee Handbook 3) the system keeps a record of this Attestation.

How/Where: **Admin**>**Audit Definitions**

New functionality:

1. Use the new **“Attestation” Audit Definition Question Type** when you want to attest a Document. The selected document will display inline within the Audit Response.
 - a. You can add more than one “Attestation” type question to an Audit Definition. (Example: For New Employee Onboarding, you can create an Audit Definition that has them sign an Employee Handbook, Worksite Agreement, etc.)
2. Use the new **“Sketch” Audit Definition Question Type** when you want the End User to sign a document.
3. You can also track the Attestation Audit statuses on **Dashboards, Widgets and Reports**.

How to set up an Attestation Audit Definition:

Pre-configuration: if you don’t already have an audit code set defined for the attestation response, you will need to configure one. (**Admin**>**Audit Code Sets**)

Code sets are used for questions that have a specific set of answers. See example below:

Administration > Audit Code Sets > Edit Audit Code Set | More ▾

Attestation

Audit Code Set Details

Name: Attestation
 Description: Do you agree with these terms?

Attestation Codes + New Audit Code

Code	Description	Score Value	Missed Response	Require Corrective Action	Require Comment	Require Task Sequence	Color
No	No, I don't agree ✎	No	No	No	No	No	✖
Yes	I agree ✎	No	No	No	No	No	✖

Attestation Configuration:

1. Create a new audit definition (**Admin>Audit Definitions>New Audit Definition**)
2. On the **Select Audit Area** screen, select the module/area that will use this Audit. (Common areas include Employees and Contacts.)
3. On the New Audit Definition screen, create the Audit and **Save**.
4. In the Audit Categories section, Click **Add Audit Category** and add the Audit category Set. Then click **Save**.
 - If an applicable Audit Category is not available, you can add a new one from **Admin>Code Tables>Audit Categories**
5. Click **Add New Question**
6. For **Question Type** select "Attestation".
7. Select the **Display Type, Question Text** (this is the Question that is displayed on the screen) and the **Audit Code Set** (this determines the answer options).
8. In the **Document Control** field, select the Document you want attested.
 - If an applicable Document is not available, you can upload a new one from **Document Controls**
9. Click **Save Changes**.
10. If you want a user to sign the attestation as well, create another question with **Question Type** "Sketch". (Question 3 in the below example)
11. When you are finished adding questions, **Save** and go back to the Attestation Audit Definition.

Example of an Attestation Audit Definition:

Administration > Audit Definitions >
Edit Audit Definition More ▾

Employee Handbook Attestation

Audit Definition Details

Description: Employee Handbook Attestation

Code: 49

Area: Employee

Allow Findings:

Shade Alternate:

Rows:

Use Jump To Menu:

Scoring Type: No Scoring

Calculate Risk:

Classification:

Can Assign Separately:

Comment Visible:

Default:

Custom Scoring:

Summary

Audit Categories + Add Audit Category

Audit Category	Order	Can Be Not Applicable	Collapsed As Default
Attestation	1	No	✖

Attestation Questions + Add New Question Reorder Questions

Question Text	Audit Category	Question Type	Question Order	Inactive
Once the document loads, Scroll to the bottom of the document. You will then be able to accept or decline the Terms ✎	Attestation	Instruction	1	No ✖
Please choose a response after reviewing the entire document ✎	Attestation	Attestation	2	No ✖
Please click "Sign Here" button to record your signature. ✎	Attestation	Sketch	3	No ✖

In this example we have created three questions.

- the first is an "Instruction" notifying the user that they need to scroll down to the bottom of the document before they will be able to choose a response.
- The second is the "Attestation" which will show the selected Document inline as well as the corresponding Audit Code Set (the answer options).
- The third is a "Sketch" element that allows the user to sign their signature on the screen.

12. From this screen, you can preview the form by clicking **More>Custom Styling**.

13. When you are finished, you can navigate to **Audit Responses** and create a new response based on your new definition.

Hide the Comment Box in the “+” Menu for an Audit Question

Previously: If you were using Comments for Audit responses, you were able to either show the Comment box for each question on the Audit Response screen or you could hide the Comment Box completely.

Now: We have added a new option that allows you to hide the “Comments” box for a question when the Audit Responses screen is opened. Then, if the End User wants to view/edit the Comments, they would open the “+” menu and select "Show Comment". The Comment Box is now displayed for that question. Don’t worry, all previous options for Comments are still available.

How/Where: Let's go over all the ways you can show or hide the Comments box for Audit Responses in the system. (Including this new feature in #3!)

- 1) **At the System Level, you can decide if:** (These options are the same as before.)
 - A. **All Audits being performed will ALWAYS show the Comments Box on the screen for every Audit Definition and every Audit Question.** To do this, ask your Origami Service Administrator to activate this option for you.
 - B. **Or you want more flexibility to show or hide the Comments Box on specific Audit Definitions and/or Audit Questions.** To do this, ask your Origami Service Administrator to activate this option for you.

- 2) **At the Audit Definition Level, you can decide if:** (These options are the same as before.)
 - C. **Inside an Audit Definition, every Audit Question for this Audit Definition will always show the Comments field.**
 - D. **Or you want more flexibility inside this Audi Definition, to turn on or off the Comments Box depending on the Audit Question.**

To do this, edit your Audit Definition. Go to: **Admin>Audit Definition>open the Audit Definition>click the Edit Audit Definition** button.

For the field: *Comment Visible Default* checkbox

- **Checked** = (option C) the Comment Box will always be visible for every question in this Audit Definition when the End User opens the Audit screen. (This option overrides any comment options you choose for each question in this Audit Definition.)
- **Unchecked** = (option D) Gives you the option to show or hide the Comment Box for each individual question in this Audit Definition.
- If, at the System level (#1 above), option A is selected, the system will ignore your selection for this checkbox.

- 3) **At the Audit Question level, you can decide if:** (THIS shows the new option!)
 - E. **The End User will see the Comment Box for this Audit Question when they first open the Audit Response screen.**
 - F. **The End user will click the “+” menu and select “Show Comment” to see the Comment Box for this Audit Question.**
 - G. **The End User will not be able to access comments at all.**

To do this, edit your Audit Question (Go to **Admin>Audit Definition>open the Audit Definition>click the Edit Audit Definition button>open the Audit Question>click the Edit Audit Question button.**)

For the field: *Allow Comment* checkbox

- **Checked** = (option E and F) the Comment Box will be visible to the End User for this question.
- **Unchecked** = (option G) the Comment Box will NOT be visible to the End User for this question.
- If at the System Level (#1 above)- option A is turned on, OR at the Audit Definition level (#2 above)- option C is checked, the system will ignore your selection for this checkbox.

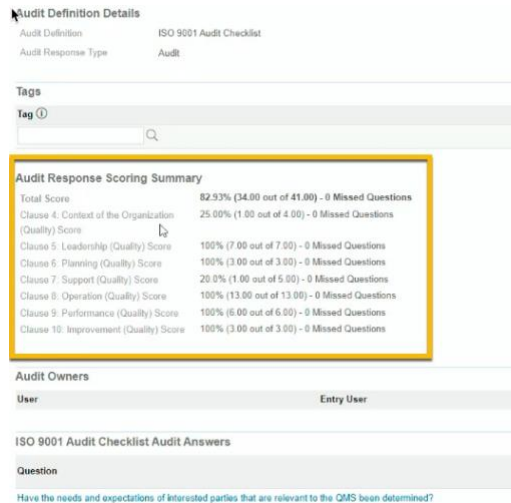
For the field: *Comment Visible Default: (This is the new field!)*

- **Yes** = (option E) Show the Comment Box on the screen for this question
- **No** = (option F) Add "Show Comment" to the "+" Menu for this question. **(This is the default option)**
- This field is only visible if you checked the **Allow Comment** checkbox.
- **Is the new Field missing from your screen even after Allow Comment is checked?** Add it here: **Admin>Custom Forms>open your Form Set>Audit Questions Section>open the Edit form** Search for "Comment" in the Field List, then drag the "CommentVisibleDefault" field and drop it into the XML so it is displayed under the Allow Comment field.

Audit Responses - NIOSH Lifting Equation Scoring								New Audit Respor	
Analysis ID	Location	Task	Analysis Date	Analysis Type	Ergonomist	Employee Assessed	Status	Lifting Index (LI) - Origin	Lifting Index (LI) - Destination
1003	15 - San Francisco	Lifting Buckets	08/05/2021	NIOSH Lifting Equation	Sean Salvas	Rogers, Keith	Complete	0.00	0.00
928	15 - San Francisco	Lifting Gear Bin	10/15/2021	NIOSH Lifting Equation	Kathy Oliveira	Rogers, Keith	Complete	0.81	0.00
				NIOSH					

Show or hide select Audit Question Scores in the Audit Response List, Dashboards, and Reports

Previously: The Audit Response Scoring Summary grid on each Audit Definition (see image below) was the only way to show scores for the Audit. There was also no way to easily show the scores on Dashboards, lists, or Reports.



Now: We have added a new way to display scoring results in addition to the above Summary grid. You can now show or hide the scores for select questions inside the All Audit Responses list and on the Audit Response screen.

Example: You have a Rapid Entire Body Assessment (REBA) Audit that requires an assessment score for each posture/question. The final question uses the previous assessment scores to calculate the REBA score. For this example, you would show the Scoring results on the REBA score question only.

When you show the Audit Score for a particular question, you can then see that Audit Scoring Summary on Dashboards, lists and reports. You can show up to 5 Category Groups and 10 Categories for each Audit Definition.

How/Where:

Determine which Categories to Show

1. **Admin>Audit Definitions>**open the Audit
2. In the **Audit Categories** section, select an Audit Category
3. Click the **Edit Audit Definition Category Set** button.
4. In the **Response Scoring Index** field, select the reference number you want to use to show the Scoring Summary for this Definition in other places.
5. Repeat steps 2 through 4 for each Category whose Scoring Summary you want to share (up to 10) for this Audit Definition.

Determine which Category Groups to Show

(Category Groups are only available on Audit Definitions that have the “Use Category Grouping” field checked on the **Audit Definition Details** screen.)

1. **Admin>Audit Definitions>**open the Audit with a Category Group.
2. In the **Audit Categories Groups** section, select an Audit Category Group.
3. Click the **Edit Audit Definition Category Group** button.
4. In the **Response Scoring Index** field, select the reference number you want to use to show the Scoring Summary for this Group in other places.
5. Repeat steps 2 through 4 for each Category Group whose Scoring Summary you want to share (up to 5) for this Audit Definition.

Rescore Existing Audit Responses

You can also rescore all existing Audit Responses. Once rescored, the Scoring Summaries can be viewed in the Audit Responses list, and in Dashboards and Reports.

1. Define all Categories and Category Groups (in the above sections) for the Audit Definition before continuing.
2. Open the Audit Response that needs re-scored.
3. Click **More>Re-score Audit Responses**.
4. This will create Audit Response Summary Score Records for all Categories and Category Groups that have a **Response Scoring Index** number.

Hide the Audit Response Scoring Summary Grid

You can hide the Audit Response Scoring Summary grid in **Admin>Custom Forms** using this syntax:

```
panelSortOrder="ResponseStatusSummary[Hide=True]
```

Show Audit Response Scoring around Origami Risk

Show Scoring on Dashboards and Reports

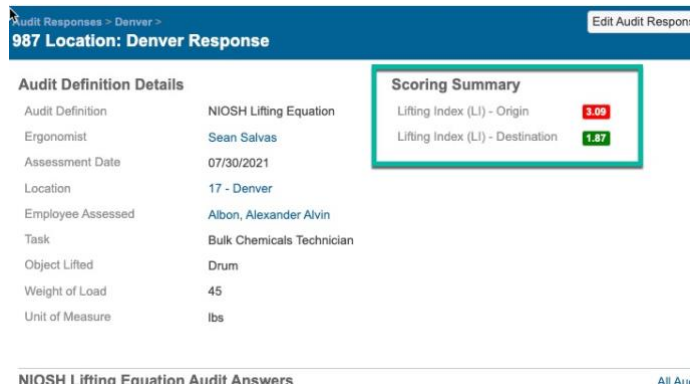
If you want to see the Scoring Summaries on your Dashboards and Reports, create a Report Data Set (**Admin>Report Data Sets**) that includes the AuditResponseSummaryScores Table.

Show Scoring on Forms

1. **Admin>Custom Forms>Audit Responses**
2. Select the Custom Parent Form Set
3. In the **Filter Forms** field, enter "Audit Definition" then click **Search**.
4. Select the Audit Definition's View/Edit Form you want to update.
5. Add a relatedField element where document="AuditResponseSummaryScore" and name= the field you want to include on the form.

Example:

```
<column>
  <section title="Scoring Summary">
    <relatedField document="AuditResponseSummaryScore" name="CategoryScore1" label="Lifting Index (LI) - Origin"/>
    <relatedField document="AuditResponseSummaryScore" name="CategoryScore2" label="Lifting Index (LI) - Destination"/>
  </section>
</column>
```



Tip: You can change the color of a field dynamically in **Admin>Field Styles**.

Show Scoring on List Views

1. On the **All Audit Responses** list view, select **Edit Columns**.
2. In the Select a column to add field, enter AuditResponseSummaryScores to add the column to the right list.
3. Click and hold the 3 dots section of the column to move the column up or down, as needed.
4. Click **Apply Changes** when you are finished.
5. If you want to save this new list view, click **Save** then fill out the information.

Example:

Audit Responses - NIOSH Lifting Equation Scoring								New Audit Respor	
Audit Definition is equal to NIOSH Lifting Equation									
Edit Criteria Edit Columns Save Save As Add to Dashboard									
Analysis ID	Location	Task	Analysis Date	Analysis Type	Ergonomist	Employee Assessed	Status	Lifting Index (LI) - Origin	Lifting Index (LI) - Destination
1003	15 - San Francisco	Lifting Buckets	08/05/2021	NIOSH Lifting Equation	Sean Salvas	Rogers, Keith	Complete	0.00	0.00
928	15 - San Francisco	Lifting Gear Bin	10/15/2021	NIOSH Lifting Equation	Kathy Oliveira	Rogers, Keith	Complete	0.81	0.00
				NIOSH					

Attach Notes, Files, a manual Revision Number, and Details to an Audit Definition

Previously: Details and Revision Number fields were not included on the standard Audit Definition domain, nor were you able to add notes or file attachments.

Now: Details and Revision Number fields are included on the standard Audit Definition domain, and you can add notes and file attachments to an Audit Definition once it has been created.

How/Where: Admin>Audit Definitions

Import Audit Templates from STP AuditHub

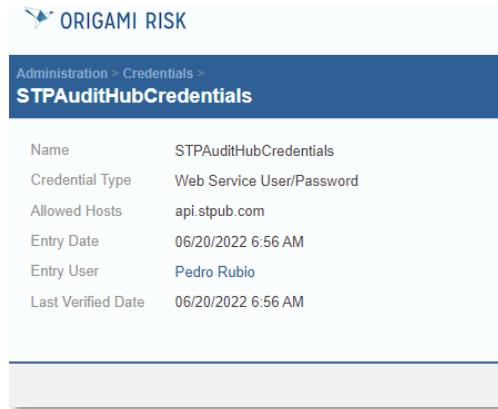
Previously: This feature was unavailable.

Now: You can import Audit Templates from STP AuditHub in Origami Risk.

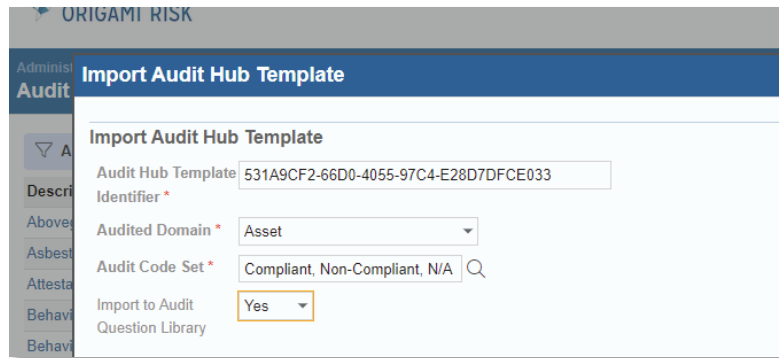
How/Where:

1. **Admin>Credentials**
2. Establish your log-in credentials by entering the following:
 - a. Name: STPAuditHubCredentials
 - b. Credential Type: Web Service User/Password
 - c. Allowed Hosts: api.stpub.com

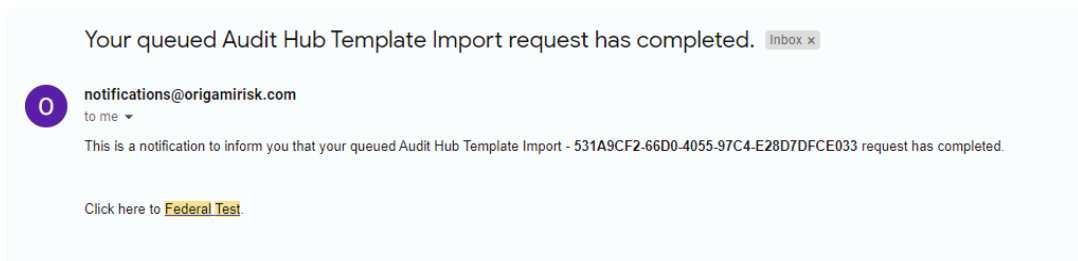
d. Username/Password: Enter your STP credentials



3. Now go to **Admin>Audit Definitions**
4. On the All Audit Definitions screen, click the **More>Import Audit Hub Template**.
5. On the **Import Audit Hub Template** screen, enter the following:
 - a. The **Audit Hub Template Identifier** for the audit you've created in STP
 - b. The **Audited Domain** that the audit is for
 - c. The **Audit Code Set** that will be used to answer the audit
 - d. Optional: Select **Yes**, if you want to import the Audit Questions to the Question Library (so that you can reuse them across other audits)



6. Once this information has been entered, Origami Risk will begin downloading the audit from STP, and you will receive an email once it is completed.



Example of an STP audit in Origami Risk:

Note: To use this feature, an account needs to be set up with STP Audit Hub, and the username/password associated with the account must be added to the Origami Credentials Manager with the name of STPAuditHubCredentials

Claims

Add Semi-Monthly and Every “X” Number of days payment options on an Indemnity Benefits schedule

Previously: You could not add pay frequencies that were “Semi-monthly” or “every “x” number of days” on an Indemnity Benefits Schedule.

Now: You can now use following pay frequencies when creating a New Benefit:

- Semi-Monthly (First Day of Month)
- Semi-Monthly (Last Day of Month)
- Every X Number of Days

How/Where:

1. Open a **Claim**.
2. Click **More>New Benefit**
3. The **Pay Frequency** field now has these three additional options:
 - a. **Semi-Monthly (First Day of Month):** (1st and 15th)
 - b. **Semi-Monthly (Last Day of Month):** (15th and last day of the month)
 - c. **Every X Number of Days**

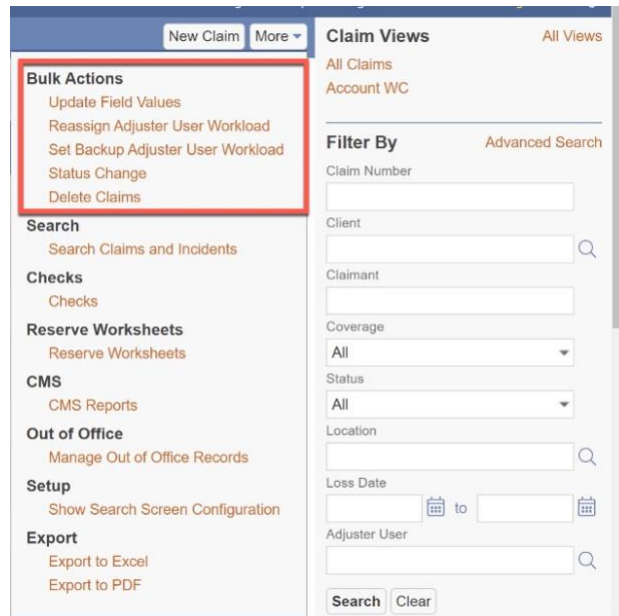


Use Bulk Actions to update Claims at the Account Level

Previously: You could only use Bulk Actions to update Claims at the Client Level.

Now: You can now use Bulk Actions to update Claims at the Account and Client levels.

How/Where: Claims>More>Bulk Actions



Contacts

Give “Contacts” a custom name throughout Origami Risk

Previously: You could not rename “Contacts”.

Now: You can now use Domain Name Overrides to rename “Contacts”, so they display as different names throughout the system.

How/Where:

1. **Admin>Domain Name Overrides>select New Domain Name Override**
2. From the **Domain** drop-down field, select “Contacts”.
3. In the **Display Name Singular** field, enter the singular version of the Display name
4. In the **Display Name Plural** field, enter the plural version of the Display name.
5. Click **Save Changes**.

View Contact connections in a Sunburst Chart

Previously: Contacts were not included in Sunburst Charts.

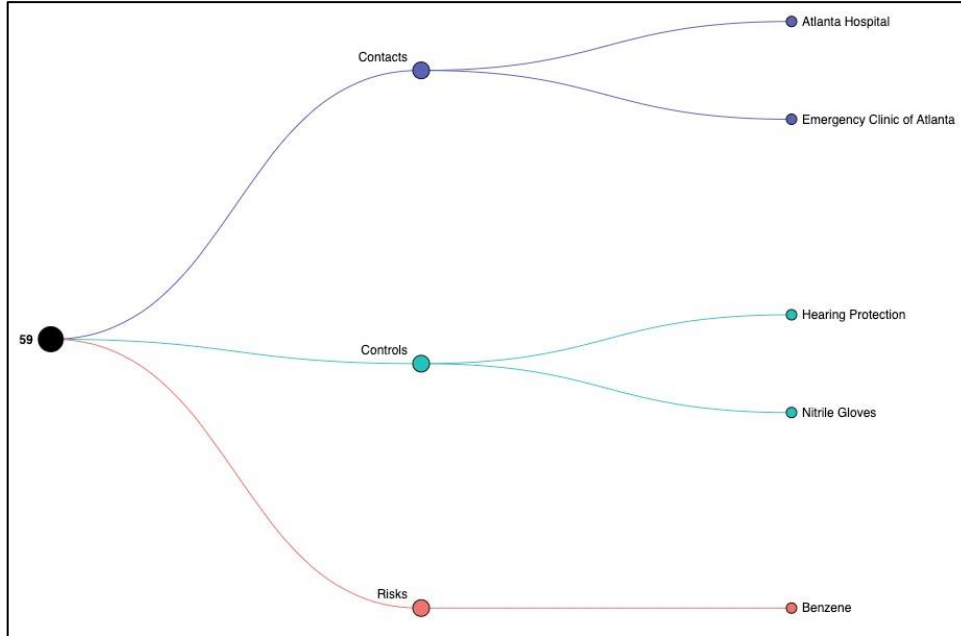
Now: You can now see any Contacts associated with your record on the Sunburst Chart.

How/Where: The sunburst chart is available for these items:

- Claims
- Document Controls
- Incidents
- Risks
- Risk Action Plans
- Risk Assets
- Risk Controls
- Risk Governances
- Risk Issues
- Risk Processes

Incident Example: From the **All Incidents** list, open an **Incident**>click the **Connections** button.

Sunburst Chart Example:



Custom Fields

New Field Format Type: FEIN

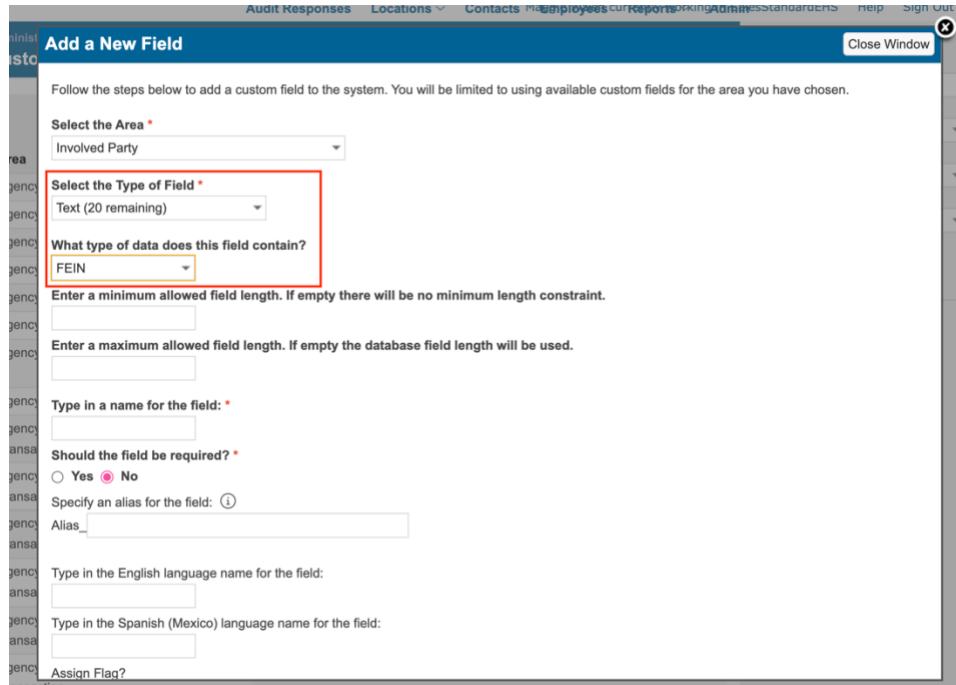
Previously: There was no FEIN format (##-#####) and the format would have to be scripted into each page where it was used.

Now: When adding a custom field, there is a new FEIN format option.

- a hyphen is added after the second character in masks.
- The data is stored without hyphens.
- Entry is restricted to nine numeric characters.

How/Where:

1. **Admin>Custom Fields**
2. Select **Add a New Field**
3. In the **Select the Type of Field**: select “Text”
4. In the **What type of data does this field contain?** field: select “FEIN”



Custom Forms

Preview your Custom EDIT Forms

Previously: It was difficult to see how your changes to a Custom EDIT Form would look to the End User. After editing a Custom EDIT form, you would need to open a related domain record to view/test your changes.

Now: There is a new Menu option: **More>Show Preview** on the Custom EDIT form that allows you to quickly see a preview of your Custom Form. (This new menu option is only available for the EDIT form.)

How/Where:

1. **Admin>Custom Forms**
2. Select the Form set.
3. Open the Custom **EDIT** Form you want to preview.
4. Click **More>Show Preview**.

Write formulas that subtract time

Previously: You were able to configure formulas to subtract dates, but not for times.

Now: You can now write formulas that subtract two times and return the difference in minutes and hours with a new set of Time functions.

How/Where: The new Time functions are modeled after the `DateUtil` functions. They support both standard and military time notation. (Examples: "01:30 PM" and "13:30").

`TimeUtil.addSeconds(time, seconds)`

- if the added seconds aren't divisible by 60 (a minute), you may wind up with something returned like hh:mm:ss [am/pm]
- If the time entry field doesn't include seconds, this function will not work.

`TimeUtil.addMinutes(time, minutes)`

- If the minutes are multiples of 60, they'll be added as hours in the returned time.

`TimeUtil.addHours(time, hours)`

- can pass fractional hours. Example: `TimeUtil.addHours(time, 3.5)` to add 3 hours 30 minutes (+3:30).
- minutes are rounded. Example: 0.26 hours is 16 minutes, rounded up from 15.600

Time Arguments

The order of the time arguments in the below functions don't matter since the absolute value of the subtraction is returned.

`TimeUtil.diffInSeconds(time1, time2)`

`TimeUtil.diffInMinutes(time1, time2)`

- whole minutes only. A value like hh:mm:ss [am/pm] passed will have seconds ignored.

`TimeUtil.diffInHours(time1, time2, asHoursMinutes)`

- `asHoursMinutes` is OPTIONAL an optional boolean (default false).
- if passed, instead of returning a decimal fraction it will return the difference in hh:mm (Example: 02:30 vs 2.5)
- minutes are rounded (Example: 2.26 would be 02:16 as hours and minutes, rounded up from 2 hours 15.600 minutes)

Additional functions:

`TimeUtil.convert24to12Time`

- Convert time from military to standard

`TimeUtil.convert12to24Time`

- Convert time from standard to military

TimeUtil.convertToMinutes

- Convert time to total minutes of the day ()

TimeUtil.leadingZero

- add leading zeros ()

Dashboards

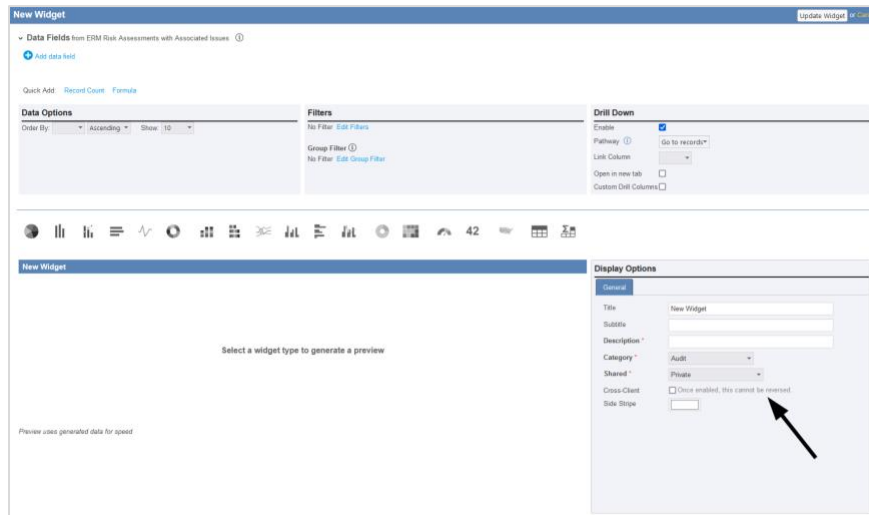
Reuse custom Dashboard Widgets in a multi-client environment

Previously: When a custom dashboard widget was created at the client level within a multi-client environment, it was only visible to that client.

Now: Custom dashboard widgets created at the client level are available to other clients within that multi-client environment.


How/Where: Dashboards

- A **Cross-Client** checkbox was added to the new/edit custom dashboard widget screen. If you are editing a custom widget that is cross-client, this checkbox will always be checked. You will not be able to uncheck it.



Note, if you choose to make a custom dashboard widget that is cross-client, the only way this can be reversed is to contact your Origami Service Administrator.

When updating an existing custom dashboard widget:

1. From a Dashboard click **Edit Dashboard**
2. From an existing custom widget select the **Edit icon** 
3. Check the Cross-Client checkbox
4. Select **Update Widget**

When creating a new custom dashboard widget:

1. From a Dashboard click **Edit Dashboard**
2. Select **Add Widget**
3. Select **New Widget**
4. Select **Data Set for New Widget**
5. Check the Cross-Client checkbox
6. Select **Update Widget**

Data Entry Events

Edit the body of Grant Access Link Emails

Previously: You were unable to edit the email used to distribute grant access links triggered as an action of a data entry event. Once the action was triggered, the email was automatically sent.

Now: Users can now edit the body of an email containing a grant access link triggered as an action of a data entry event, prior to it being sent.

How/Where: Admin>Data Entry Events

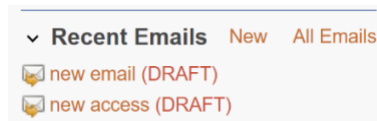
1. An option to ‘Create Draft Email on Manual Fire’ was added to the Data Entry Events Manual Event Details section.

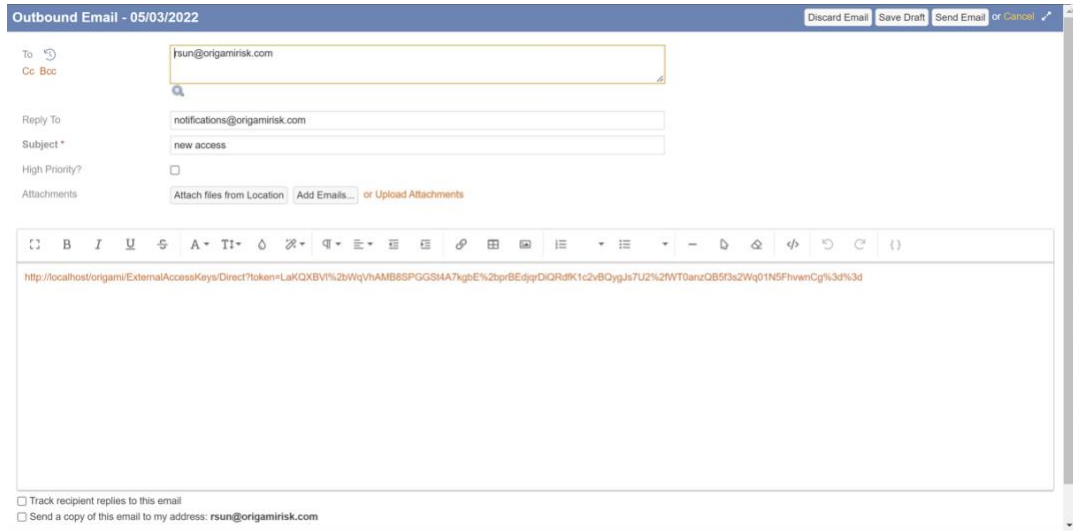
Manual Event Details

- Allow Manual Fire of this event
- Apply Filter Condition to Manual Event ⓘ
- Apply User Condition to Manual Event ⓘ
- ONLY** allow event to be run manually ⓘ
- Show event as separate button ⓘ
- Allow event to be run as Bulk Action ⓘ
- Create Draft Email on Manual Fire ⓘ

If checked, emails from this event will be saved as draft instead of sent.

2. If this option is selected, when the grant external access action is triggered, the email is saved as a draft on the record that triggered the action. The user can edit and then send the email from that record.





Document Controls

Configure custom Workflow for Documents

Previously: Document Controls and Document Control Published Files were not available in Data Entry Events. This means users were unable to configure custom workflows for these domains.

Now: Document Controls and Document Control Published Files are now available in Data Entry Events, allowing users to configure custom workflows for these domains.

How/Where: Admin>Data Entry Events

Deactivate a Document Control

Previously: Document control records could not be deactivated.

Now: You can now deactivate Document Control records.

How/Where: Document Controls>More>Deactivate Document Control

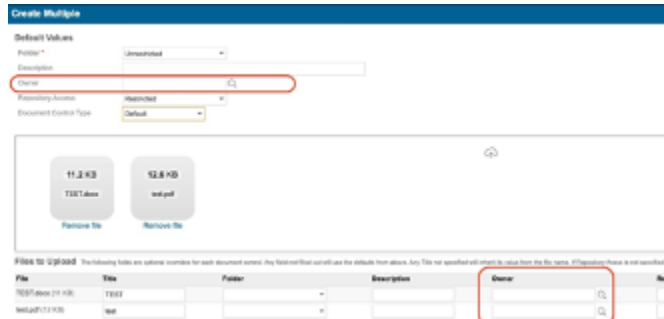
Define an Owner when Bulk uploading documents

Previously: When you bulk uploaded documents to Document Controls, the User who uploaded the documents would be automatically marked as the Owner.

Now: We have added new Owner fields on the **Create Multiple** screen. You can now assign owners two ways. 1.) you can assign the owner for each Document in the upload individually or 2.) all Documents that have the Owner field left blank, will get auto-assigned the owner you selected as the Default Owner for this upload.

How/Where:

1. **Document Controls>More>Create Multiple**
2. In the **Default Values** section, use the new **Owner** field to set the Owner for each Document in the Files to upload list whose Owner is currently blank (empty).
3. Add your files.
4. In the **Files to Upload** section, use the individual **Owner** fields for each Document to give that Document a different Owner than the one you defined in step 2.



Edit content and manipulate the pages of your Documents

Previously: You could only view, edit and annotate your documents in the system.

Now: We have added 10 new ways to edit the content and manipulate your documents.

How/Where:

Document Controls You can now:

- Replace text
- add Watermarks
- Rotate, move, and delete pages
- Crop, insert, merge, and split/extract pages

Admin>Users and Security

To grant access to these new functions, turn on: **Edit Pages**

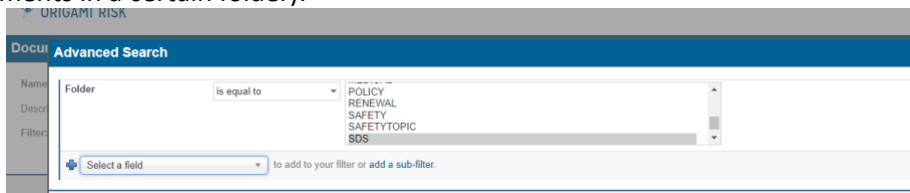
Track the Document language

Previously: You could not track what documents are written in what languages in Document Controls.

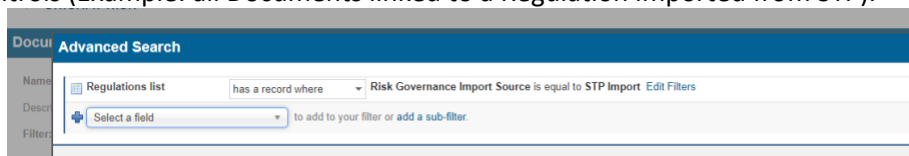
Now: The LanguageID field is now available in the default Edit and View Forms in Document Controls.

How/Where:

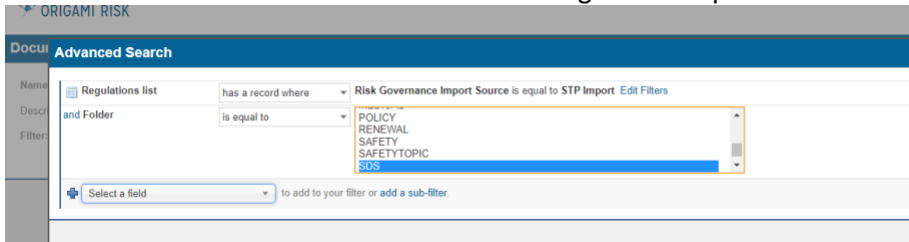
1. **Document Controls>More>Manage Filters**
2. Select **New Document Control Repository Filter**
3. Create your Filter.
 - Repository Filters use the standard Advanced Search filter to create a view of open access Published Documents.
 - Filters can be created based on the fields of Document Controls (Example: all Documents in a certain folder).



- Filters can be created based on the fields of domains associated to Document Controls (Example: all Documents linked to a Regulation imported from STP).



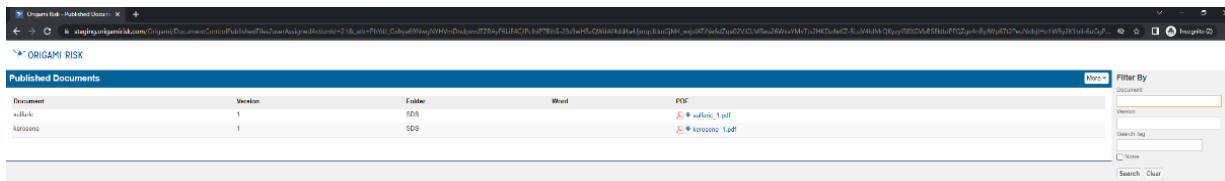
- Filters can be used in conjunction with one another (Example: all Documents in a certain folder linked to all Documents linked to a Regulation imported from STP).



4. Click **Save Changes**
5. Once a Document Control Repository Filter has been created, it will generate two links. One is for named users and one is for external users. These links can be shared to provide access to the filtered Documents.

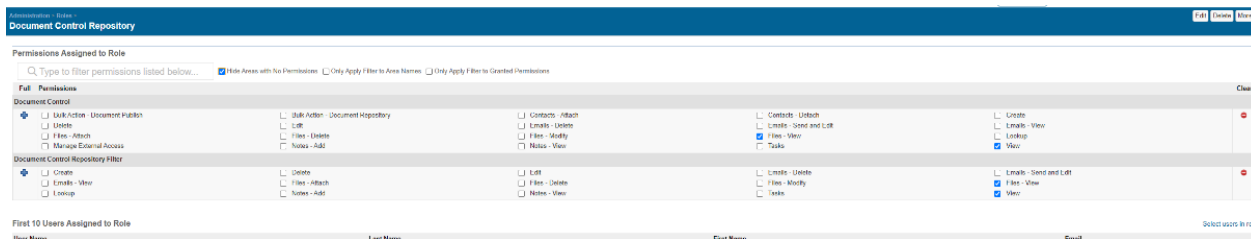
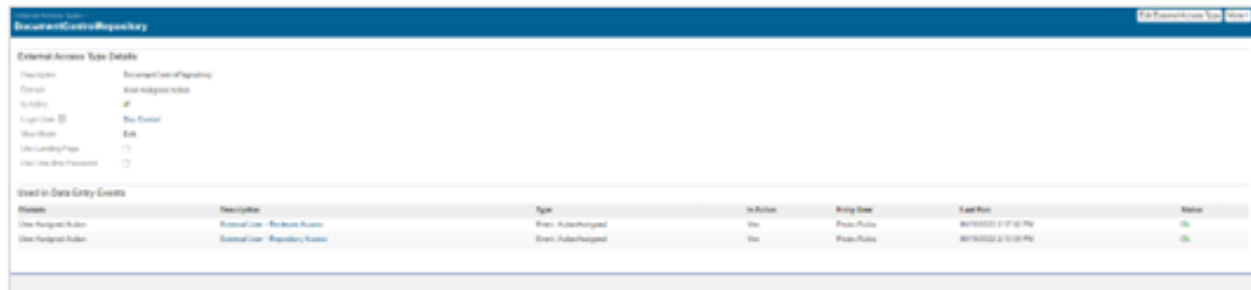
Below is an example of the above filter. Only two Documents in the repository, with open access, satisfy the filter “kerosene” and “sulfuric.” As expected, only those two Documents are available when using the Repository Filter’s URL.

Document	Version	Folder	Word	PDF
Testing	2	POLICY	Testing_2.docx	Testing_2.pdf
Testing PDFs	1	ERS		TestingPDFs_1.pdf
sulfuric	1	SDS		sulfuric_1.pdf
Change Only Form Notes	2	ERS	Change Only Form Notes_2.docx	Change Only Form Notes_2.pdf
kerosene	1	SDS		kerosene_1.pdf



Note: The Repository Filter’s external link will only work if you have an external access type for the User Assigned Action domain. (Just like when assigning access to a single Document.) You can do this in **Admin>External Access Types**. The Login User must have access **View** and **Files - View** access to Document Controls and Document Control Repository Filters.

Below is an example of an External Access for the Document Control Repository and the Role Permissions that must be assigned to the Login User for the External Access.



Dashboards

Automatically refresh your Dashboard

Previously: If you wanted to refresh the information on your Dashboard, you would click “Refresh Data” in the top left corner of your Dashboard.

Now: We have added a new option: “Set Auto-Refresh” on the top left of your Dashboard. This setting will not work if you view your Dashboard anonymously.

How/Where:

1. Open your **Dashboard**.
2. Select “Set Auto-Refresh” at the top left of the **Dashboard** screen.



3. From here, enter how often in minutes you want the system to automatically refresh your Dashboard information. Then click **Save**.



4. The Dashboard will continue to refresh at the set refresh rate until you log out of your session.
5. When you log back in, you will need to re-enter your refresh rate.
 - If you want to keep this setting active every time you log into the system, you can save the URL (when you have an Auto-Refresh rate set), then use it later to log into the system.

Field Styles

Create Style Conditions based on any fields

Previously: When you created a new Field Style, and selected the Field Name, the system would restrict you to only being able to select the same Field Name in the **Style Condition** filter.

Now: You can now select any Field to create the Style Condition, if that Field is also displayed in the grid.

How/Where:

1. **Admin>Field Styles>**click the **New Field Style** button
2. For **Style Condition**, select **Edit Filters**.
3. Select as many conditions (based on any field) as needed to format this field.

Form Snippets

Add any top-level Form Element to a Form Snippet

Previously: When creating a Form Snippet, you could only include panels and their children (`<panel/>elements`). The workaround was to manually copy the grid panels from one form to another.

Now: When creating a Form Snippet, you can now use any type of top-level form element (`<form/>elements`) inside Multi-Panels as well as *other* Multi-Panels. This includes: gridPanels, widgetPanels, scriptPanels, mailMergePanels, incidentTypeQuestionsPanels, domainComparisonPanels, and reserveWorksheetGridPanels.

How/Where: Admin>Form Snippets

Heat Maps

Plot total risk score and an additional factor on an ERM Heat Map

Previously: You were unable to create a heat map that plotted total risk score (inherent or residual) on one axis and an additional data point on the other axis.

Now: You can now create heat maps that plot total risk on one axis and an additional factor, or data point, on the other axis.

How/Where:

1. Admin>Heat Map Templates>click **New Heat Map Template**
2. The **Custom Definition Heat Map** templates have been updated to allow a factor to be specified for an axis. When a factor is selected, you can now also specify which axis the Total Score is associated with. The default is the Y axis.

Template Details

Name *	Inherent Definition with Factor Test
Template Type *	Definition Template
ERM Lens *	Sample Lens 8-20-19
Score Type	Inherent
Number Rows *	0
Number Columns *	0
Factor	Velocity Non-Scoring
Total Score Axis	<ul style="list-style-type: none"> Y Axis X Axis Y Axis

- 3. When a factor is included on a definition for an axis, the grid cell options include a Score Value and a Factor Value input textbox.

- 4. The definition template displays the Score and Factor Values for each cell visible as it is being modified and the final template does the same.

Template Details

Name * Inherent Definition with Factor Test

Template Type * Definition Template

ERM Lens * Sample Lens 8-20-19

Score Type Inherent

Number Rows * 3

Number Columns * 3

Factor Velocity Non-Scoring

Total Score Axis Y Axis

Heat Map Details

Total Inherent Score	High	1,20	2,20	3,20
	Medium	1,12	2,12	3,12
	Low	1,1	2,1	3,1
		Low	Medium	High
		Velocity		

If no ERM Lens is selected or if the ERM Lens has no non-scoring factors that are integer-type and not optional, then the factor field is disabled. Otherwise, the drop-down shows all factors that are applicable for the selected ERM Lens.

Template Details

Name *

Template Type *

ERM Lens *

Score Type

Number Rows *

Number Columns *

Factor

Adding a Widget

Adding the widget to a Dashboard works the same as it previously did. There are no additional widget options for this feature for the custom heat maps templates.

Edit Dashboard Widget - ERM Custom Heat Map

Caption *

Filter No Filters [Edit Filters](#)

Options

Specify score type to drive heat map

Score Type

Additional filtering options

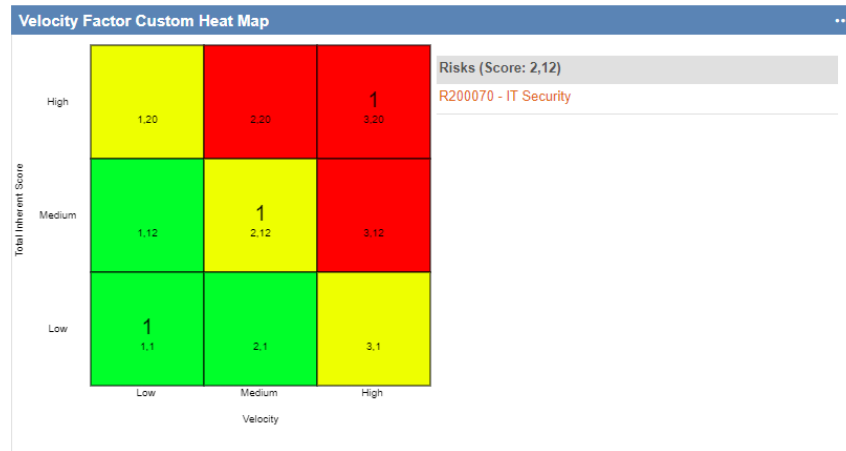
Score Lens *

Score Plan

Definition Template *

Show Score Value

- If the **Show Score** setting is enabled for the widget, the Score and Factor Values for each cell are visible on the widget. The first value is whichever is on the X axis and the second value is whichever is on the Y axis. Additionally, clicking on a cell with one or more Risk falling into those values shows the risks to the right of the widget with the x, y values on the header (e.g., Risks (Score: 2, 12)).



- The **full screen view of the widget** displays all risks that match values defined in the widget with the corresponding score values.



Incidents

Enable a User-specific security question for Incident Drafts

Previously: Incident Drafts were only protected by Device and/or User-generated Passcodes.

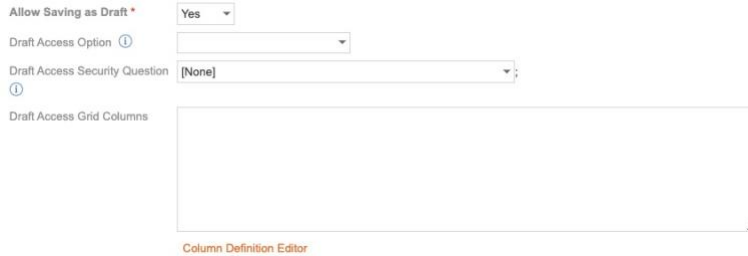
Now: You can now add an extra security level when using a passcode (with or without cookies) to require the User to use a single security question

How/Where:

Admin>Anonymous Collection Links

1. Open an existing Anonymous Collection Link (or create a new one and save).
2. In the Collection Links section, select **New Collection link Item**.
2. Select the Type: **Incident**. (This functionality only works for Incidents)

3. In the New Collection link Item screen:
 - a. In the **Allow Saving as Draft** drop down list, select “Yes”. (This opens the Draft fields, below.)



The screenshot shows a configuration interface with the following fields:

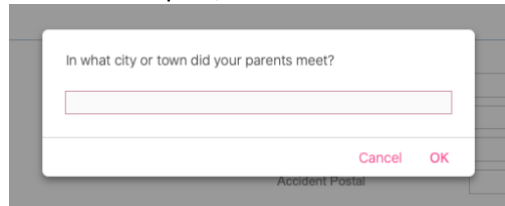
- Allow Saving as Draft ***: A dropdown menu with "Yes" selected.
- Draft Access Option**: A dropdown menu.
- Draft Access Security Question**: A dropdown menu with "[None]" selected.
- Draft Access Grid Columns**: A large empty text area.

Below the grid columns is a small orange text label: "Column Definition Editor".

- b. In the **Draft Access Option** drop down list, select “By Passcode” or “Both Device and Passcode”
 - c. In the **Draft Access Security Question** drop down list, select the required security question.

End User

1. When an End User fills out an incident via the anonymous collection link, they have the choice to save an unfinished Incident as a Draft.
2. When they select this option, they will be prompted to provide an answer to the security question selected in step 3c, above.



The screenshot shows a dialog box with the text: "In what city or town did your parents meet?". Below the text is a text input field. At the bottom right of the dialog are "Cancel" and "OK" buttons. The text "Accident Postal" is visible at the bottom of the dialog.

JSA / LOTO

New Custom Fields

Previously: There were no custom fields available for Job Safety Analysis (JSA) and Lockout/Tagout (LOTO) domains.

Now: Custom fields are now available for JSA and LOTO domains.

How/Where: JSA and LOTO domains

The types and quantities of custom fields by domain are as follows:

JSA Records, LOTO Procedures, JSA Steps, LOTO Steps:

- 30 Text
- 20 Code
- 30 Number
- 10 Narrative
- 10 Money
- 10 Multi-select

- 10 User
- 10 Contact
- 20 Date
- 20 Bool

JSA Requests, LOTO Requests, JSA Approval Log, LOTO Approval Log:

- 20 Text
- 10 Code
- 20 Number
- 5 Narrative
- 5 Money
- 5 Multi-select
- 10 User
- 10 Contact
- 20 Date
- 20 Bool

Add Mobile Forms

Previously: Mobile Forms were unavailable for JSA and LOTO domains.

Now: Mobile Forms can be created for the following domains: JSA Records

- JSA Steps
- LOTO Procedures
- LOTO Steps

Child forms can also be created.

How/Where:

1. Navigate to **Admin>Mobile Forms**
2. Select **New Mobile Form**
3. Select **Event Area** (Examples: JSA Record, JSA Step, LOTO Procedure, LOTO Step)
4. Enter **Mobile Form Details**
5. Add Child Forms, **Save**

Configure Data Entry Events

Previously: You were unable to configure data entry events for JSA and LOTO requests.

Now: You can now configure data entry events for JSA and LOTO requests.

How/Where:

1. **Admin>Data Entry Events**
2. Select **New Data Entry Event**
3. For the **Event Area** you can select:
 - Job Safety Analysis Record
 - Job Safety Analysis Requests
 - Lockout Tagout Procedures
 - Lockout Tagout Requests
4. Provide Data Entry Event Details
5. Click **Save Changes**

Generate Printable Abstracts

Previously: This feature was unavailable.

Now: You can generate Printable Abstracts for JSA and LOTO several ways.

How/Where:

The More button

- **Admin>Job Safety Analysis Records>JSA Record>More>Printable Abstract**
- **Admin>Lockout Tagout Procedures>More>Printable Abstract**

Data Entry Events

- **Admin>Data Entry Events>jsaAbstract**
- **Admin>Data Entry Events>lotoAbstract**

The "Printable Abstract" bulk action

- **Admin>Job Safety Analysis Records>More>Bulk Actions**
- **Admin>Lockout Tagout Procedures>More>Bulk Actions**

Advanced search functionality added

Previously: Advanced search was unavailable for JSA and LOTO domains.

Now: Advanced search is available for JSA and LOTO domains.

How/Where: JSA and LOTO Domains

Advanced search was added to the right search panel on the JSA and LOTO index pages.

View JSA Documents and LOTO procedures from an anonymous portal

Previously: This feature was unavailable.

Now: You can now use the anonymous portal to view and sign-off on a JSA Document and/or create a LOTO procedure.

How/Where:

Allow Users to view and sign-off on a JSA Document from an anonymous portal

1. Create or edit a Job Safety Analysis. On the Edit Job Safety Analysis screen:
 - a. Select a **Letter Template**. (This will be the document used for the JSA Request)
 - b. Set the **Status** to “Approved”
2. Create or edit an anonymous Collection Link. (**Admin>Anonymous Collection Links**)
On the Edit the Anonymous Collection Link screen:
 - a. Set **Is Active?** to “Yes”
 - b. Set the **Login User** to a User that has access to JSA Requests. Then select **Save Changes**.
 - c. In the **Collection Link Items** section, create and edit an Anonymous Collection link Item. On the **Edit Anonymous Collection Link Item** screen:
 - i. On the **Select Type** screen, select the JSA domain.
 - ii. Set **Is Active?** To “Yes”
 - iii. Repeat the above 2 steps for each item in this section.

Allow Users to create a LOTO procedure from an anonymous portal

1. Create or edit a Lockout Tagout Procedure. On the Edit Lockout Tagout Procedure screen:
 - a. Select a **Letter Template**. (This will be the document used for the LOTO Procedure)
 - b. Set the **Status** to “Approved”
2. Create or edit an anonymous Collection Link. (**Admin>Anonymous Collection Links**)
On the Edit the Anonymous Collection Link screen:
 - a. Set **Is Active?** to “Yes”
 - b. Set the **Login User** to a User that has access to Lockout Tagout Procedures. Then select **Save Changes**.
 - c. In the **Collection Link Items** section, create and edit an Anonymous Collection link Item. On the **Edit Anonymous Collection Link Item** screen:
 - i. On the **Select Type** screen, select the LOTO domain.
 - ii. Set **Is Active?** To “Yes”
 - iii. Repeat the above 2 steps for each item in this section.

Mail Merge

Upload a Signature Image for In-App Signing

Previously: You could only configure your Mail Merge Templates to be signed via typing and/or drawing your signature.

Now: You now have a third option: upload a signature image from your desktop.




How/Where:

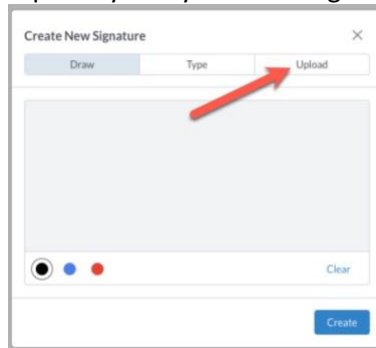
To use the Upload option, follow the **Admin** steps, below, to update an Existing Template.

Admin

1. **Admin>Mail Merge Templates**
2. Open an existing Mail Merge Template or create a new Letter Template.
3. In the **Pdf Signature Mode** drop down list, make sure NOTHING is selected. Here are the options:
 - a. (blank) = Users will be able to type, draw, or **UPLOAD** their signature.
 - b. Typed = Users will only be able to Type in their signature
 - c. Drawn =Users will only be able to Draw their signature
 - d. Typed or Draw Option = Users will only be able to type or draw their signature.
4. In the **Template File** field, make sure you have uploaded a **.PDF file**. (No other formats will work for In-app Electronic Signatures.)
5. Now click **Save Changes**.
6. In the **E-Signature Elements** section, make sure each of the elements have this field checked:
 - a. **In App** - CHECKED
 - Checked = For PDF files. This allows Users to sign this PDF inside the application.
 - Unchecked = For .DOCX files. This allows Users to sign this .DOCX file with DocuSign

End User

1. Open an item (Claim, Incident, etc.) that has the Mail Merge Letter Template.
2. Click **More>Forms and Mail Merge Letters**
3. Click the Edit Icon for the Template you want to sign. 
4. On the document, click on the **Sign Here** icon. 
 - If your Sign icon is green: , you will need to see your Origami Service Administrator to update your system settings so you can use this feature.



5. Then click the **Upload** button.

Members

View Delinquency Events for Members

Previously: There was no way to view delinquency events associated with a member.

Now: A new **More** menu option is now available to view all delinquency events for the selected member.

How/Where: **Member>Open a Member>More>Delinquency Events**

Member Transactions

View the Total Amount Paid for Member Transaction Payment Entries

Previously: When entering Member Transaction Payments in bulk, the total paid amount was not displayed automatically.

Now: A new aggregate field has been added to the bottom of the payment grid on the Payment Entry Form in Member Transactions. The new field will display the updated sum of payment transactions.

How/Where: Member Transactions>More>Payment Entry

Draft Payments			
Transaction Date	Insured	Policy	Paid Amount
07/01/2022	Royal Mines and Minerals Corp.		500.00
07/01/2022	Milky White Creamery Corp		800.56
07/01/2022	BB Company		52,398.25
			Total: \$53,698.81

Mobile Forms

Mobile Form menu options limited to applicable Domain and Record

Previously: When you clicked **More>Send to My Device**, you could see all the Mobile Form options for the applicable domain, even if they did not match the record you were viewing.

Now: You will only see the Mobile Forms for the applicable domain where the Mobile Form “vary forms by” field matches the record the user is viewing.

How/Where: This change applies across domains where Mobile Forms are configurable and to all Mobile Forms where **Action Type** = Start New and Send Existing Records or Send Existing Records to App.

For example, when viewing a “Monthly Safety Huddle” record, you only see the matching Mobile Form under **More>Send to My Device** instead of both Safety Huddles Mobile Forms.

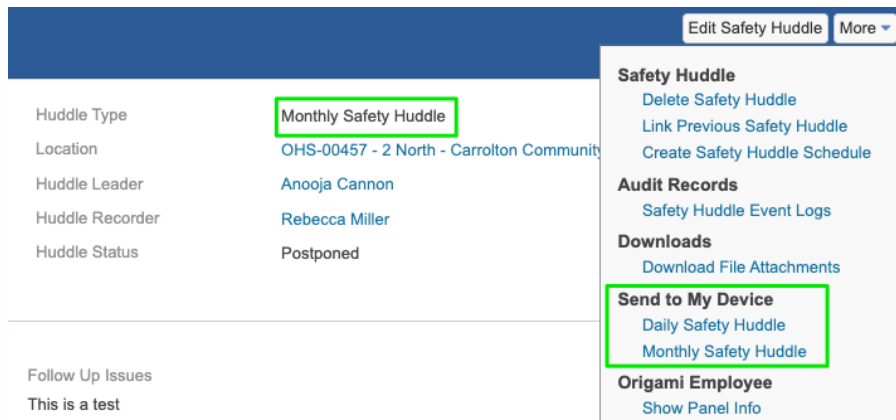


Figure 1 - Previously All Mobile Forms Displayed

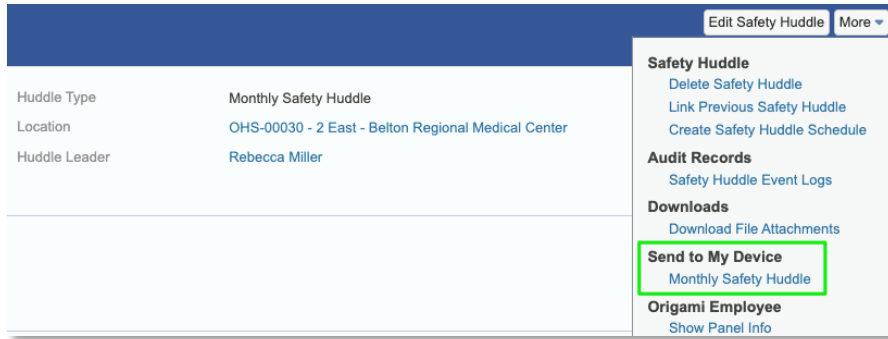


Figure 2 - New Feature Filters to Only Matching Mobile Forms

Outgoing Email Logs

Export Outgoing Email Logs to Excel

Previously: There was no way in the UI to export Outgoing Email Logs.

Now: You have access to export Outgoing Email Logs to Excel.

How/Where: Admin>Outgoing Email Logs>More>Export to Excel

Policy Billing

Automatically decline manual partial payments on a Delinquent Policy

Previously: If a Policy was delinquent and a notice of cancellation was sent, the system still allowed a User to accept partial payments on the policy.

Now: You can now automatically decline partial payments by using the new checkbox “Accept only full payment on delinquent policy”.

How/Where: Access checkbox via **User Admin>Billing Profile>Payment Delinquency**.

Payment Delinquency

i The following options are only enforced for policies where the rating pr

Amount Threshold ⓘ

Percentage Threshold ⓘ

Grace Period ⓘ Days After Due Date

Cancel After ⓘ Days After Grace Period

Cancellation Reason

Delay Billing Days After Cancellation

Accept Only Full Payment on Delinquent Policy

- When checked, the system will check prior to manual payment allocation.
- For delinquent Policies, the following error message will occur:

New Insured Payment

! Please correct the following errors.

- Partial payments are not accepted on delinquent policies.

Payment Details

Member Addison Schuardt

Policy 🔍

Invoice Type *

Create Commission Checks twice a month

Previously: You were only able to create Commission Checks once a month on a specific date.

Now: You can now create commission checks once or twice a month.

How/Where:

1. **Admin>Rating Programs>Open a Rating Program**
2. Click **More>Billing & Commissions**
3. In the **Commission Disbursement** section, there is new, second drop down list for the **Create Checks on** fields.

Commission Disbursement

i The disbursement method for commission is typically set at the Ager

Agency Bill

Disbursement ⓘ

Create Checks on and

Day of Month ⓘ *

- If you fill in the second field, disbursements will take place twice a month.
- If you leave the second field blank, disbursements will take place once a month.

Define Installment Fees as an add-on to the Payment Plan

Previously: Installment fees were added in the Rating program.

Now: Installment fees are now added in a Billing profile as an add-on to the Payment Plan.

How/Where:

1. **Admin>Billing Profiles>**open an existing Billing Profile
2. To use the new installment fees, you must first remove any existing premium line item in the rating program that is adding installment fees.
3. After removing any legacy installment fees, edit the billing profile.
4. In the **Installment Fees** Section:
 - a. check **Enable Installment fees**.

- b. Select a **premium category** for fees.
- c. **Fee Type** will default to “Installment Fee Options” which can be assigned with the billing frequency options for the billing profile.

Billing Frequency	Initial Percentage	Is Down Payment	Security Deposit Percentage	Security Deposit Threshold	Per Installment Fee Filter
Monthly	10.00	No			5.01
Quarterly		No			3.01
Semi-Annually		No			2.01
Ten-Pay	20.00	Yes			4.01

- d. Alternatively, you can select the **Fee Type** “Custom Scripts” to define the installment fees. Click **Edit Script** to develop and test your script.

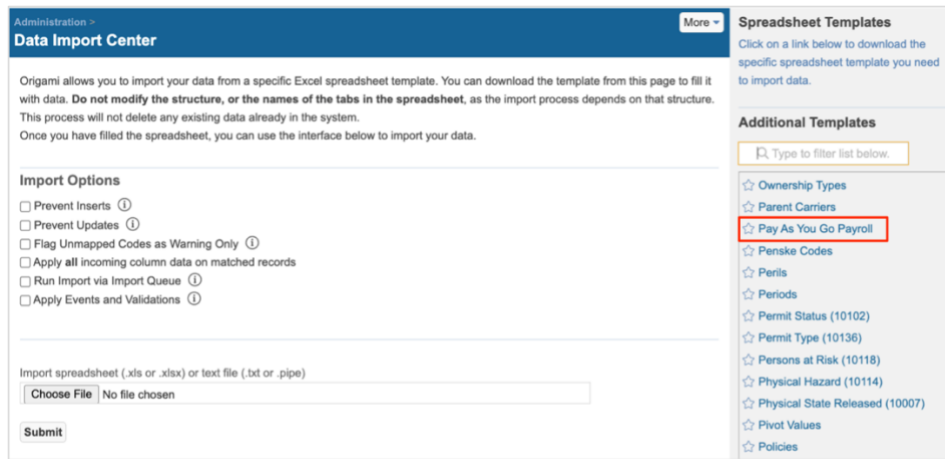
```
function Go(memberTransaction, proposal, ctx) {
  ctx.DebugLog("frequency = " + proposal.BillingFrequency);
  ctx.DebugLog("trans date = " + memberTransaction.TransactionDate);
  ctx.DebugLog("state=" + memberTransaction.BillingStateID);
  // enter your code here, return 0 if no late fee should be charged.
  // example
  return ctx.Util.SharedRateLookup("Shared.SimpleInstallmentFees", "Fee", "[State]=" +
    memberTransaction.BillingStateID + ", BillingFrequency=" + proposal.BillingFrequency + "",
    memberTransaction.TransactionDate, 0);
}
```


Import Pay As You Go Payroll information with a new template

Previously: You were unable to import payroll information through the Data Import Center when using Pay As You Go.

Now: You can now import Pay-As-You-Go payroll information through the Data Import Center with the new Template: **Pay As You Go Payroll**.

How/Where: Admin>Data Import Center. The new **Pay As You Go Payroll** template is in the **Spreadsheet Templates** list on the right.

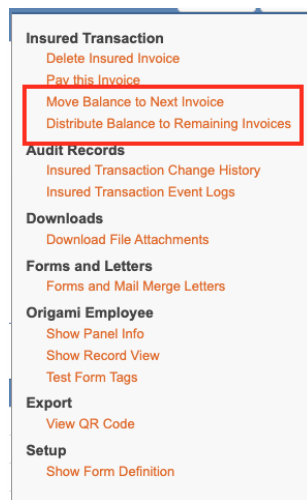


Move or distribute remaining Invoice balances to subsequent Invoices

Previously: This feature was unavailable.

Now: There are now options available to move the remaining invoice balance to the next invoice or to distribute the balance to remaining invoices.

How/Where: Policy Billing>Member Invoice>More



Move Balance to Next Invoice

1. When this option is selected, the current invoice’s remaining balance will be credited and in the next invoice, this amount will be debited.
2. In the table, **PolicyInvoiceLineChanges**, an adjustment record will be created for each line item of the invoice that is moved to the next invoice.

Initial Premium - 22-PC-00010 Go to Quote				
Description	Amount	Credited	Paid	Outstanding
Base Premium	3,963.17	3,963.17		0.00
22-PC-00010	3,963.17			
Balance moved to invoice 1106		3,963.17		
Admin Fee	79.26	79.26		0.00
22-PC-00010	79.26			
Balance moved to invoice 1106		79.26		
Claims Admin Fee	118.90	118.90		0.00
22-PC-00010	118.90			
Balance moved to invoice 1106		118.90		
Risk Management Fee	158.53	158.53		0.00
22-PC-00010	158.53			
Balance moved to invoice 1106		158.53		
Underwriting Fee	118.90	118.90		0.00
22-PC-00010	118.90			
Balance moved to invoice 1106		118.90		

Figure 3 - Current Invoice

Initial Premium - 22-PC-00010 Go to Quote				
Description	Amount	Credited	Paid	Outstanding
Base Premium	3,963.17			3,963.17
Admin Fee	79.26			79.26
Claims Admin Fee	118.90			118.90
Risk Management Fee	158.53			158.53
Underwriting Fee	118.90			118.90
Forwarded Balances				
Description	Amount	Credited	Paid	Outstanding
Base Premium (Moved from 0066-009)	3,963.17			3,963.17
Admin Fee (Moved from 0066-009)	79.26			79.26
Claims Admin Fee (Moved from 0066-009)	118.90			118.90
Risk Management Fee (Moved from 0066-009)	158.53			158.53
Underwriting Fee (Moved from 0066-009)	118.90			118.90

Figure 4 - Next Invoice

Distribute Balance to Remaining Invoices

1. When this option is selected, the current invoice’s remaining balance will be credited. This amount will be evenly debited to the remaining invoices.
2. In the table, **PolicyInvoiceLineChanges**, an adjustment record will be created for each line item of the invoice that is moved to the next invoice.

Preview the Payment Plan before you bind an Endorsement

Previously: When you were Binding an Endorsement, you could only see a preview of the payment schedule if you selected “Distributed amount to the remaining pending invoices for the policy”. The preview payment was unavailable if you chose the “Bill Amount to next pending invoice”

Now: You can now see a preview of the Payment Plan when you select “Bill amount to next pending invoice” on the **Bind Proposal** screen.

How/Where:

1. Open a **Policy** that still has pending Invoices.
2. Click **More>Create Endorsement**
3. Click the **Bind Endorsement** button.
4. In the **Billing** section, both these options now show a Payment Plan preview:
 - a. (New!) Bill Amount to next pending invoice on...
 - b. Distribute amount to next pending invoice on...

Preview the Payment Plan before you bind a Proposal

Previously: When you created a Proposal, you could not see a preview of the Payment Schedule without bidding the Proposal first.

Now: You can now preview the selected Payment Plan for review before Binding the Proposal.

How/Where:

1. Open the **Proposal** you want to bind.
2. Click the **Bind Proposal** button.
3. When you select a Payment Option, the new section **Payment Plan Preview** is displayed.

Payment Options						
	Initial Payment	Initial Due Date	Number of Payments	Installment Fees	Total Payment	
<input type="radio"/> 10 Pay - 10% Down	526.20	07/17/2022	8	70.00	3,424.00	
<input type="radio"/> 12 Pay - 10% Down	526.20	07/17/2022	8	70.00	3,424.00	
<input type="radio"/> SplitPay - 0 Deposit	3,354.00	08/01/2022	1	0.00	3,354.00	
<input checked="" type="radio"/> Semi-Annual - 10% Down	526.20	07/17/2022	3	20.00	3,374.00	
<input type="radio"/> Semi-Annually	3,364.00	10/26/2022	1	10.00	3,364.00	

Payment Plan Preview				
Transaction Date	Start	End	Due Date	Billed Amount
06/22/2022	02/07/2022		07/17/2022	526.20
07/07/2022	07/07/2022	08/06/2022	08/01/2022	1,423.90
08/07/2022	08/07/2022	09/06/2022	09/01/2022	1,423.90
				3,374.00

4. You can also select different Payment Options and review the corresponding Payment Plan.
5. When you have selected the correct Payment option, click **Submit Changes**.

Preview the Payment Plan before you change the Billing Frequency

Previously: When you selected **Change Billing Frequency**, you could not see the Payment Schedule without submitting the Change first.

Now: You can now preview the selected Payment Plan for review before submitting the billing change. This feature only works for Policies that have Change Billing Frequency.

How/Where:

1. Open a **Policy**.
2. In the **Premium Invoices** section, select **All Premium Invoices**.
3. **On the Policy Billing** screen, click **More>Change Billing Frequency**.
4. Now, when you select a Payment Option, the new section, **Payment Plan Preview** is displayed.

Payment Options					
	Initial Payment	Initial Due Date	Number of Payments	Installment Fees	Total Payment
<input type="radio"/> 10 Pay - 10% Down	526.20	07/17/2022	8	70.00	3,424.00
<input type="radio"/> 12 Pay - 10% Down	526.20	07/17/2022	8	70.00	3,424.00
<input type="radio"/> Semi-Pay - 0 Deposit	3,354.00	08/01/2022	1	0.00	3,354.00
<input checked="" type="radio"/> Semi-Annual - 10% Down	526.20	07/17/2022	3	20.00	3,374.00
<input type="radio"/> Semi-Annually	3,364.00	10/26/2022	1	10.00	3,364.00

Payment Plan Preview				
Transaction Date	Start	End	Due Date	Billed Amount
06/22/2022	02/07/2022		07/17/2022	526.20
07/07/2022	07/07/2022	08/06/2022	08/01/2022	1,423.90
08/07/2022	08/07/2022	09/06/2022	09/01/2022	1,423.90
				3,374.00

5. You can also select different Payment Options and review the corresponding Payment Plan.
6. When you have selected the correct Payment option, click **Submit Changes**.

Policies

Require a Reinstated Policy to have no gap in coverage

Previously: You were able to reinstate a Policy even if there was a gap between when their policy was cancelled and then reinstated.

Now: In a Rating Program, you can turn on the new “Gapless Reinstatement” feature that restricts a User from reinstating a Policy if the Change Date is not the same as the Policy’s Cancellation Date.

How/Where: Admin>Rating Program>select the Rating Program, then click **Edit Rating Program**.
(Or create a New Rating Program)

New field: Gapless Reinstatement checkbox

- **Checked:** when you want all reinstated Policies to use the Policy’s Cancel Date as the new Effective Date.
- **Unchecked:** Users can select an Effective Date for the reinstated Policy that leaves a gap between coverage from when the Policy was cancelled and then reinstated.

Review and approve recurring Policies

Previously: Document Controls only supported one-time review access to Policies.

Now: Document Controls now supports both one-time and recurring review access to Policies.

How/Where: User Assignments that populate the File Access grid panel for Document Controls can now be scheduled to be added by the system in the future.

Document Controls>open a Document Control.

1. Select **Assign Multiple** on the File Access grid panel



2. Select one or more users and click **Next**

3. Select **Scheduled** and provide Schedule details.

Create User Assignments

2 Users selected from the search results.

You have individually selected the following User records:

ROBERT PETRIE | LINUS CONCEPCION

One Time: Scheduled: ←

Assignment Details

Days Duration:

Schedule

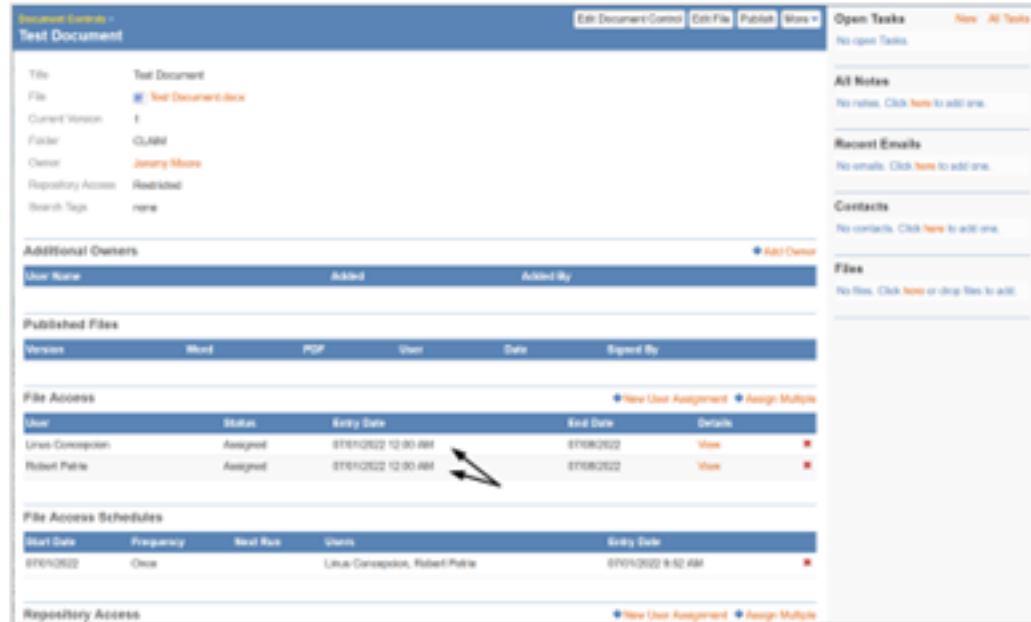
Frequency:

Runs on this selected month's each user.

4. Click **Submit**
5. After saving the scheduled User Assignments, a new grid panel, **File Access Schedules**, is added to the Document Controls view.

Start Date	Frequency	Next Run	Users	Entry Date
07/08/2022	Monthly		Robert Petrie, Linus Concepcion	08/08/2022 9:52 AM

6. The application automatically inserts the configured User Assignment Review records as configured. Please note, the page does not automatically refresh.



- If you need to make a change, you will need to delete the schedule and create a new one. Note: If a schedule is deleted, the records from the File Access grid panel (history) are not deleted.

Note: We are working to improve this process. In a future release, you will be able to configure the schedule and users separately.

View Delinquency Events for Policies

Previously: There was no way to view delinquency events associated with a policy.

Now: A new **More** menu option is now available to view all delinquency events for the selected Policy.

How/Where: Policy > Open a Policy > More > Delinquency Events

Example of the Delinquency Events for a Policy

WCP-0110-10424-01 - 10/02/2021 >									
Policy Delinquency Events									
Event Date	Event Type	Policy Number	Member	Broker	Due Date	Cancellation Date	Overdue	Total Balance	
11/04/2021	Cancelled	WCP-0110-10424-01	NY Test Policy 2	Cornell Insurance Services	10/18/2021	11/03/2021	7,201.00	7,201.00	
10/22/2021	Notification	WCP-0110-10424-01	NY Test Policy 2	Cornell Insurance Services	10/18/2021	11/03/2021	7,201.00	7,201.00	
10/19/2021	Grace Period	WCP-0110-10424-01	NY Test Policy 2	Cornell Insurance Services	10/18/2021	11/03/2021	7,201.00	7,201.00	

Risk Profiles

Add Tasks, Notes, and Files

Previously: You were unable to add tasks, notes, and files to Risk Profile records.

Now: You can now add tasks, notes, and files to a Risk Profile.

How/Where:

1. **Admin>Risk Profiles>open a Risk Profile**
2. Add your items in the Right-side panel.

Safety Huddles

New Safety Huddle Attendee Fields

Previously: Fields were not included on the standard Safety Huddle Attendee domain.

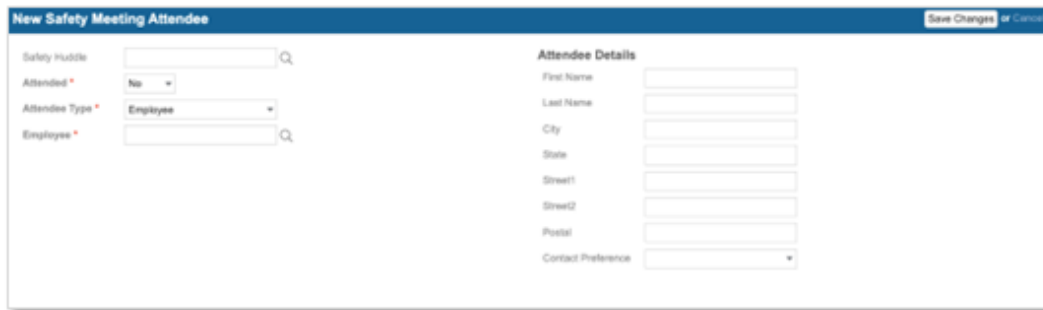
Now: When creating a new Safety Huddle Attendee, the following fields are now included on the standard Safety Huddle Attendee domain for Attendee Types Employee, Contact, and User:

- First Name
- Last Name
- Email
- Phone
- Street1
- Street2
- City
- State
- Postal
- Contact Preference drop down list (Email, Text Message)

Additional Custom Fields Available (Admin>Custom Fields):

- 20 Custom Texts
- 20 Custom Numbers
- 20 Custom Booleans
- 5 Custom Narratives
- 10 Custom Codes
- 5 Custom Multiselect Codes
- 5 Custom Contacts
- 5 Custom Users
- 15 Custom Dates
- 10 Custom Moneys

How/Where: Safety Huddle – New Safety Meeting Attendee Screen




Easily update Attendees

Previously: When creating or editing a Safety Huddle, you needed to add/edit each attendee by opening their attendee record.

Now: you can now edit the Attendee’s record right in the Safety Huddle Attendees table. The table was also updated to show Attendee Phone Numbers.

How/Where:

1. **All Safety Huddles**> click the **More** button Open an existing **Safety Huddle**
2. In the **Safety meeting Attendees** grid, click on the Attendee to update.
3. The “Email”, “Phone”, and “Attended” fields are now editable.
4. Update the record, then click SAVE  (on the right) for that record.

Generate Printable Abstracts for Safety Huddles

Previously: This feature was unavailable.

Now: You can generate Printable Abstracts for Safety Huddles several ways.

How/Where:

The More button: Admin>Safety Huddles>Huddle Number>More>Printable Abstract

Data Entry Events: Admin>Data Entry Events>abstractsSafetyHuddles

The “Printable Abstract” bulk action: Admin>Safety Huddles Records>More>Bulk Actions

Quickly add the entire team to a Safety Huddle

Previously: When adding a Team to a Safety Huddle, there were two options:

1. **Add the Team as an Attendee:** Only the Team Name was added to the attendee list. This did not allow for information to be tracked by member (like attendance) nor notifications to be sent to team members (like emails to all attendees).
2. **Add Individual Team Members:** Individual team members can be added as attendees, one member at a time. (This option still works the same.)

Now: When you add a Team to a Safety Huddle or Safety Huddle Schedule, the system now inserts all members of that team as attendees by default. You can also add additional team members, if desired.

How/Where: Safety Huddles and Safety Huddle Schedules

Add Emails, Tasks, Abstracts, Notes, Files and more to Safety Huddle Attendees

Previously: The functionality was limited for Safety Huddle Attendees. The Display Name also displayed incorrectly, with hyphens.

Now: The following functionality now works with Safety Huddle Attendees:

- Emails
- Tasks
- Abstracts
- Update Multiple
- Notes
- Views
- Files (includes the “Sketch” Element for capturing signatures)

How/Where: Safety Huddle Schedules

- The Display Name of Safety Huddles and Safety Huddle Attendees now displays without hyphens.

Give “Safety Huddle Type” and “Safety Huddle Issue Type” a custom name

Previously: You could not rename “Safety Huddle Type” or “Safety Huddle Issue Type”.

Now: You can now use Domain Name Overrides to rename “Safety Huddle Type” and/or “Safety Huddle Issue Type” so they display as different names throughout the system.

How/Where:

1. **Admin>Domain Name Overrides>select New Domain Name Override**
2. From the **Domain** drop-down field, select “Safety Huddle Type” or “Safety Huddle Issue Type”.
3. In the **Display Name Singular** field, enter the singular version of the Display name
4. In the **Display Name Plural** field, enter the plural version of the Display name.
5. Click **Save Changes**.

Bulk Update Safety Huddles, Safety Huddle Attendees, and Safety Huddle Issues

Previously: You were unable to bulk update field values for Safety Huddles, Safety Huddle Attendees, and Safety Huddle Issues

Now: You can now bulk update field values within the Safety Huddles, Safety Huddle Attendees, and Safety Huddle Issues

How/Where:

1. Go to one of these sections: **Safety Huddles, Safety Huddle Attendees, or Safety Huddle Issues**.
2. Click **More>Update Field Values**.

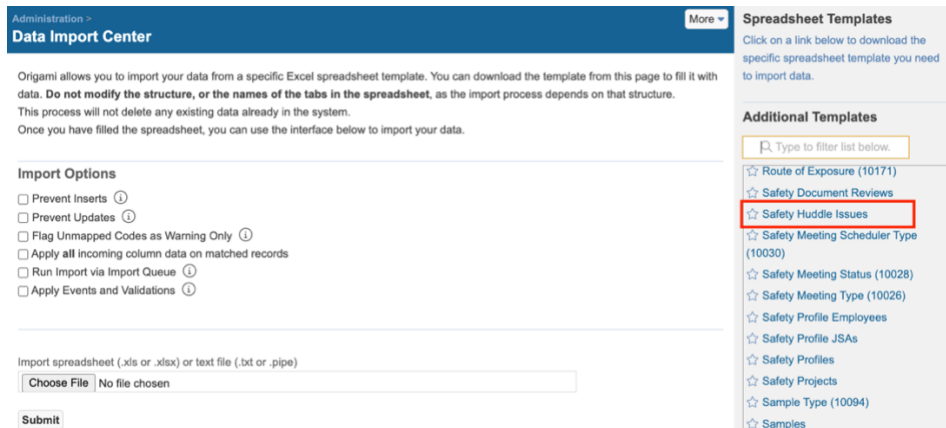
Import Safety Huddle Issues in the Data Import Center

Previously: Users were unable to import Safety Huddle Issues via the Data Import Center.

Now: Users can now import Safety Huddle Issues via the Data Import Center.

How/Where: Admin>Data Import Center

A template has been included in the **Additional Templates** menu on the Data Import Center page.



The screenshot shows the 'Data Import Center' page. On the left, under 'Import Options', there are several checkboxes: 'Prevent Inserts', 'Prevent Updates', 'Flag Unmapped Codes as Warning Only', 'Apply all incoming column data on matched records', 'Run Import via Import Queue', and 'Apply Events and Validations'. Below this is a text input field for 'Import spreadsheet (.xls or .xlsx) or text file (.txt or .pipe)' with a 'Choose File' button and a 'Submit' button. On the right, under 'Additional Templates', there is a search bar and a list of templates. The 'Safety Huddle Issues' template is highlighted with a red box. Other templates include 'Route of Exposure (10171)', 'Safety Document Reviews', 'Safety Meeting Scheduler Type (10030)', 'Safety Meeting Status (10028)', 'Safety Meeting Type (10026)', 'Safety Profile Employees', 'Safety Profile JSAs', 'Safety Profiles', 'Safety Projects', and 'Sample Type (10094)'.

Users can also export Safety Huddle Issue records in Data Import Center format from within the **More** menu of the Safety Huddle Issue domain.

Safety Meeting Topic Number	Meeting Date	Entry User	Safety Meeting Topic Type	More	
5		Cameron Schwartz	MOC	Export Export Safety Meeting Topics in Data Import Center Format Export to Excel Export to PDF Bulk Actions Update Field Values Setup Show Search Screen Configuration	
6		Sarah Templeton	OSHA Toolbox Talk		
7	12/01/2021	Ryan Healey	OSHA Toolbox Talk		
8	01/07/2022	Sarah Templeton	Permit Review		
9	01/01/2022	Sarah Templeton	OSHA Toolbox Talk		
TEST	04/18/2022	Carla Santos	Safety Committee		Related topic: No
10		Barney Boynton	Safety Culture		Safety Talk: Preventing Slips, Trips & Falls: No
11	06/01/2022	Pedro Rubio	CAPA Review		Info: No
12	06/09/2022	Sean Salvias	LOTO		Review LOTO protocols: No
13	06/09/2022	Sean Salvias	Permit Review		Review confined space permit: No
14		Pedro Rubio	CAPA Review		No

Use Data Validations in Safety Huddle Domains

Previously: Data validations were unavailable for Safety Huddle domains.

Now: Data validations are available for the following Safety Huddle domains:

- Safety Huddles
- Safety Huddle Issues
- Safety Huddle Attendee
- Teams
- Team Members

How/Where:

1. **Admin>Custom Data Validations**
2. Select **New Data Validation**
3. Select the area for the data validation you want to create. The Safety Huddle domains listed above are now available at this step.
4. Provide the Data Validation Details
5. Click **Save Changes**

Domain	Name	Update Action Type	Condition	Enabled
Medical Bills	27356TestValidation	Raise a Warning	Bill Description is equal to "genenclashvalueblank"	Enabled for Data Entry Only
Claims	TestValidation	Raise a Warning	Claimant is equal to "notarealvaluegethere"	Enabled for Data Entry Only
Safety Huddle Attendees	Data Validation Test Safety Huddle Attendees	Correct Records	City (Location) is equal to "Tampa"	Enabled
Safety Huddle Issues	Data Validation Test Safety Huddle Issues	Raise a Warning	Is inactive is true	Enabled for Data Entry Only
Safety Huddles	Data Validation Test Safety Huddles	Raise a Warning	City (Location) is equal to "Tampa"	Enabled for Data Entry Only
Teams	Data Validation Test Teams	Raise an Exception	Is inactive is true	Enabled for Data Entry Only
Team Members	Data Validation Test Team Members	Correct Records	Contact is equal to	Enabled for Data Entry Only

Filter By

Name:

Domain:

Update Action Type:

Condition:

Enabled:

Search

Tasks

Use Bulk Actions to update Tasks at the Account Level

Previously: You could only use Bulk Actions to update Tasks at the Client Level.

Now: You can now use Bulk Actions to update Tasks at the Account and Client levels.

How/Where: **Tasks>More>Bulk Actions**

Values Collection

Move to the New Version

Previously: We still had Clients using the Old Version of Values Collection.

Now: We have completely phased out the Old Version and have moved everyone over to the New Version. If you were using the Old Version of the Values Collection, your database will automatically be switched to the New Version.

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

How do I know if I was on the Old Version?

Old Version of the Value Collection Assignments Screen

Location / Territory / Member	Member Info	Renewal Questionnaire	Payroll Schedule
City of Lebanon (MS)	Tim Cuckow	Tim Cuckow	Tim Cuckow
City of Springfield (MI)	John Carlson	John Carlson	John Carlson

New Version of the Value Collection Assignments Screen

Location / Member	Group	Status	Comments	Primary	Secondary
LOCB2C1 - Atlanta	Employees	Pending		Lexi Wagner	Unassigned
LOCB2C1 - Atlanta	Property	Pending		Lexi Wagner	Unassigned
LOCB1C4 - Baltimore	Employees	Assigned		Lexi Wagner	Unassigned
LOCB1C4 - Baltimore	Property	Assigned		Lexi Wagner	Unassigned

What's Changed: See the [Origami October 2021 Client Release Notes](#) (pg. 49) for an overview of what's changed in the New (AKA: Beta) version of the Value Collection. Note: It was called the Beta version in the October 2021 Release Notes.

Fixed

JSA / LOTO

Blank and duplicate step numbers are now auto-numbered correctly

Previously: When you added a new step to an existing JSA or LOTO, the system did not adjust the auto-numbering correctly in these situations: If the step number was left blank, it automatically put this new step as step 1. If you used an existing step number, it would show as a duplicate step number.

Now: When you add a new step to an existing JSA or LOTO, auto-numbering will now correct these situations:

- If you do not enter the step number, it will be added as the last step.
- If you enter a step number that already exists, the new step becomes that number, while the existing step gets pushed down. (So, the existing step 2 now becomes step 3.)

Grid Panels now show images on Grid Panels

Previously: If you had an image in a Grid Panel that was read only, the image would not show. Images would only show in editable Grid Panels.

Now: Images are now always shown in editable and read-only Grid Panels.

Security permission errors have been fixed

Previously: Role Permissions were missing from the new standard Lockout/Tagout (LOTO) and Job Safety Analysis (JSA) solutions. This resulted in errors such as being unable to create Report Templates that referenced these domains in a Report Data Set. A workaround was used to mitigate such issues.

Now: Security permissions have now been added to the JSA and LOTO domains. The steps and approval log subdomains now inherit permissions from the main domain (Example: LOTOSTep and LOTOApprovalLog copy permissions from LOTO). Requests have a separate set of permissions. Once the new permissions are set up, the report templates can be saved successfully.

How/Where: Admin>Roles

The system now saves the JSA or LOTO Request before retrieving the JSA/LOTO

Previously: When End Users created a new JSA or LOTO Request the clicked the “Retrieve the JSA” or “Retrieve the LOTO” button, the system did not save the JSA or LOTO Request first. Then if an End User accessed the file and closed the tab without saving, the JSA / LOTO Request was not saved.

Now: When the End User now clicks the “Retrieve the JSA” or “Retrieve the LOTO” button, the system first saves the **new** JSA or LOTO Record then retrieves the file.

How/Where:

JSA

All Job Safety Analysis Requests>New Job Safety Analysis Request>select the “Retrieve the JSA” button

LOTO

Lockout Tagout Requests>New Lockout Tagout Request>select the “Retrieve the LOTO” button

Mail Merge

Print Preview and Printing now hides the grey box on each Merge Field

Previously: When you used Print Preview or Printed a Mail Merge document, there would be a grey box on every Merge Field in the document.

Now: The grey boxes are now hidden when you select Print Preview or print the form.

How/Where:

1. On an Incident or Claim, click **More>Forms and Mail Merge Letters** or **Online State Forms**.



2. Click the **Edit** button next to the Letter or Form you want to print.



3. Click the **Print Document** button, then click **Print**.

Policies

Files and Emails are now saved when you rewrite a Policy

Previously: When you rewrote a Policy, none of the attached Files and Emails would be transferred to the new Proposal.

Now: All attached Files and Emails will be copied from the Cancelled Policy to the new re-written Proposal.

How/Where: Policies>Open a cancelled Policy>More>Copy to Rewrite Quote. The newly created Proposal will now have links to all the Policy files and emails from the cancelled Policy.

Safety Huddles

You can now add Attendees to Safety Huddle Schedules

Previously: Attendees could not be added to a safety huddle schedule.

Now: Once you create a safety huddle schedule, you can now add attendees.

How/Where: Safety Huddle Schedule

Safety Meeting Schedules > Edit Safety Meeting Schedule More ▾

View Safety Meeting Schedule

Meeting Name: Test Huddle
 Meeting Time: 12:00 AM
 Is Active: No
 Location: 35 - Chicago
 Leader User: Sarah Templeton
 Schedule: Run on the 1st of each month at 12:00 AM (UTC-06:00) Central Time (US & Canada). Expires 10/6/2022 at 12:00 AM (UTC-06:00) Central Time (US & Canada).
 Last Run UTC: 06/01/2022
 Generate Days In Advance: 2

▾ Safety Meeting Attendees ➕ New Safety Meeting Attendee

Display Name	Team	Email	Attendee Type	Attended	Meeting Name
Jack Martin Aitken	Liztomania		Employee	No	
Alex Ackles	Liztomania		Employee	No	

▾ Safety Meetings

Meeting Number	Meeting Type	Meeting Date	Status	Location	Leader User	Entry Date
126	Management of Change (MOC) Review	03/01/2022	SCHEDULED	35 - Chicago	Sarah Templeton	03/01/2022 12:00 AM
289	Management of Change (MOC) Review	04/01/2022	SCHEDULED	35 - Chicago	Sarah Templeton	04/01/2022 12:00 AM
449	Management of Change (MOC) Review	05/01/2022	SCHEDULED	35 - Chicago	Sarah Templeton	05/01/2022 12:00 AM

1. On the View Safety Meeting Schedule screen, select **New Safety Meeting Attendee**.
2. Add Attendee Details and click **Save Changes**.

Emails are now automatically included for Attendees added as a Team to a Safety Huddle

Previously: If you added Attendees as a team to the Safety Huddle or Safety Huddle Schedule, you had to add the Attendees' emails manually.

Now: When you add a Team to the Safety Huddle or Safety Huddle Schedule, the emails for Users, Employees, and Contacts will be displayed if they have an email in the system.

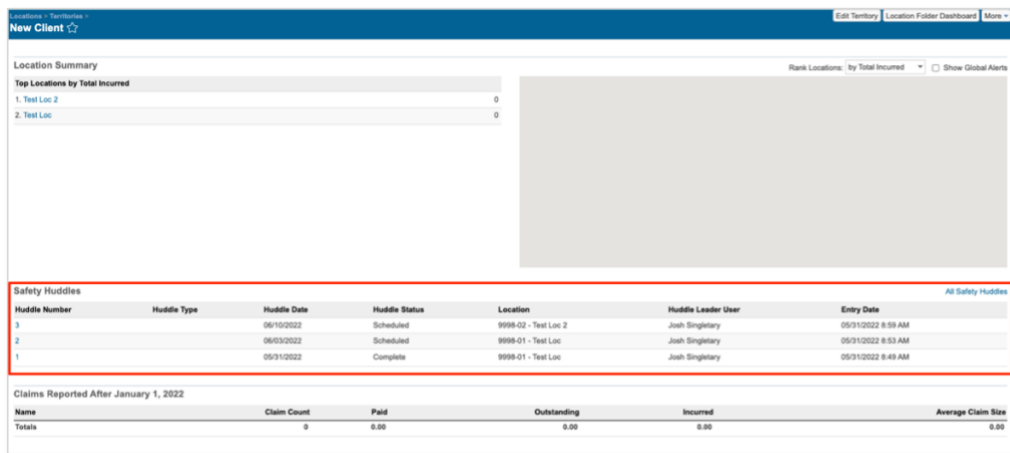
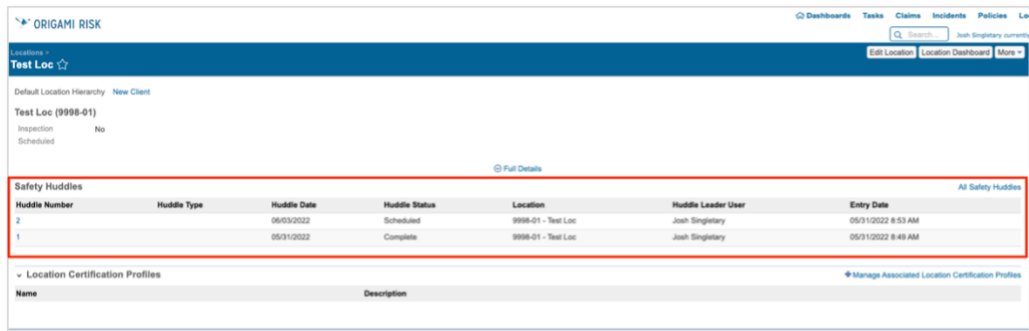
How/Where: Safety Huddles and Safety Huddle Schedules

Safety Huddle records now automatically display as a grid panel on associated Locations and Territories

Previously: A location/territory could be associated with a Safety Huddle record using standard fields. However, when doing so, the Safety Huddle record was not available within a grid panel on the view form of the Location/Territory.

Now: You can now view the Safety Huddles grid panel on Locations/Territories.

How/Where: Safety Huddle Domain. When you populate the Location/Territory field on a Safety Huddle record, the Safety Huddle record is then automatically displayed as a grid panel on the selected Location/Territory record.



You can now save Safety Huddle Issues as a Child Form of Safety Huddles in Mobile Forms

Previously: When creating a mobile form, you would receive an error if you attempted to add Safety Huddle Issues as a Child Form of Safety Huddles.

Now: When creating a Mobile Form for Safety Huddles, Safety Huddle Issues can now be saved as a Child Form.

How/Where: Admin>Mobile Forms

Sub-Factors

You can now add “N/A” as an option for all Sub-Factors

Previously: If a User manually typed “N/A” into a **Sub-Factor** field, the system would still save, but would not remove it from the denominator when calculating the average scores.

Now: Once implemented, the End User will be able to select “N/A” for their Sub-Factor selection. All “N/A” selections will equal a Value of “0” (zero impact) when calculating average scores.

How/Where: To use this new feature, you will need to create a new Factor. You cannot add, modify, or delete any existing Sub-Factors or Factors that have already been used. This keeps the integrity of the existing data intact.

Creating a New Factor that allows “N/A” as a response for all Sub-Factors

1. **ERM>Factors>New Factor** button
2. Enter your Factor Information.
3. In the **Data Type** drop down list, select either “Integer” or “Decimal”, depending on how you want to score this item. (Sub-Factors cannot be created on “Text”.)
4. In the **Scoring Factor** drop down list, select “Yes”. (This shows the **Sub-Factors** section at the bottom and the new field: **Allow N/A in SubFactors**.)
5. In the new field: **Allow N/A in SubFactors**, Select **Yes** from the drop down list. (This allows End Users to select “N/A” as a response for all Subfactors.)
6. Finish adding your Factor Values and Sub-Factors.
 - a. In the **Factor Values** section, add your **Values and Display Text**. (The Values and Display Text will be cloned to each Sub-Factor you create.)
 - b. When complete, click the **Add Sub-Factor** button.
 - c. This message is displayed “Sub-Factors should only be created once factor values are ready to go. Are you finished setting up your factor values?”.
 - Click **OK** if you have added **Values** and **Display text** for each Factor Value you want included in the new Sub-Factor sets. (This information will be cloned to your Sub-Factor sets.)
 - Click **Cancel** if you need to adjust your Factor Values.

- d. After you click **OK**, all the information in the **Display Text** fields is shown in the **Value** fields for your new Sub-Factor set. You cannot change the information in the Value fields for a Sub-Factor set. This keeps the ratings for each Sub-Factor set on an even scale.
 - You CAN change the Display Text in the above **Factor Values** section. This new information will be automatically copied over to each Sub-Factor set automatically.)
 - e. Now add in the requirements for each Value in the **Description** Field.
7. When you are finished, click **Save**.

What the End User will see: (ERM>Risks>New Risk)

A screenshot of a form field labeled 'Impact *' with the text 'Service Disruption, Affect Upon Funds or Process *'. Below the text is a dropdown menu with 'N/A' selected and highlighted in yellow.

In a drop down List, "N/A" will be at the bottom of the list.

A screenshot of a form field labeled 'Impact *' with the text 'Service Disruption, Affect Upon Funds or Process *'. Below the text are five radio buttons: 'Insignificant (1)', 'Minor (2)', 'Moderate (3)', 'Major (4)', and 'Critical (5)'. The 'N/A' option is selected and highlighted in yellow.

Radio Buttons

A screenshot of a form field labeled 'Impact *' with the text 'Service Disruption, Affect Upon Funds or Process *'. Below the text are five segmented buttons: 'Insignificant (1)', 'Minor (2)', 'Moderate (3)', 'Major (4)', and 'Critical (5)'. The 'N/A' option is selected and highlighted in yellow.

Segmented Control