ORIGAMI RISK

SERVICE
CASE MANAGEMENT
CLIENT TRAINING

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To view our full training video, please click here

How to Access the Case Management Portal

1. Log in to your Origami system

2. Click the "**Get Support**" link in the top right corner
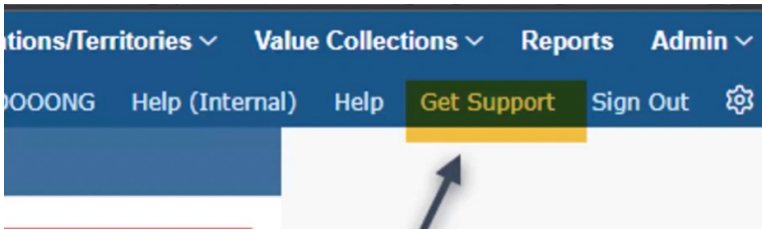
3. This will take you to the Case Management Client Portal, or the Client Portal for short

If you do not see the "Get Support" link, please contact your focused coverage team for access.

Navigating the Service Case Management Portal

Corresponding Video: 01 Client Portal Overview

1. Once you've accessed the Service Case Management Client Portal, you will be brought to the home screen. The home screen includes a few different sections.

2. The first section shows basic information about your open cases including the number of open requests and incidents, cases requiring your action, and deferred cases.
    *   You can click on the different colored sections of the graph to filter down to cases of that type
    *   You can also click on the blue text that says "View Report" at the bottom of each component to drill down into a detailed report listing.

3. The next section includes links to pre-built reports that allow you to slice and dice your case information in various ways to get more information about what has been done and what is in progress with your Origami team.

CLOSED CASES	RESOLVED INCIDENTS	OTHER
Last 90 Days	Last 90 Days	All Deferred Cases
This Year	This Year	All Cases by Type
Closed Cases Last 12 Months	All Time	Closed All Time

4. The bottom section is where you will find filtered lists that allow you to view, sort, access, and update your cases.
   - You can use the arrow next to My Account – All Open Cases to select a different list view. You can use the thumb tack icon next to the list name to pin that list which will make it appear as your default list.
     - *My Account – All Cases:* All cases, regardless of status
     - *My Account – All Open Cases:* All cases that are not in a "Closed" Status
     - *My Account – Cases Created by Me*
     - *My Account – Open Deferred Cases:* All cases currently in a "Deferred Status"
     - *My Account – Open Incidents:* All cases with a type of "Incident" that are not in a "Closed" status
     - *My Account – Open Requests:* All cases with a type of "Request" that are not in a "Closed" status
     - *Recently Viewed*
   - Within each list, you can click on the case number or subject to open that case
   - You can click on the arrow next to each column heading to sort by that column

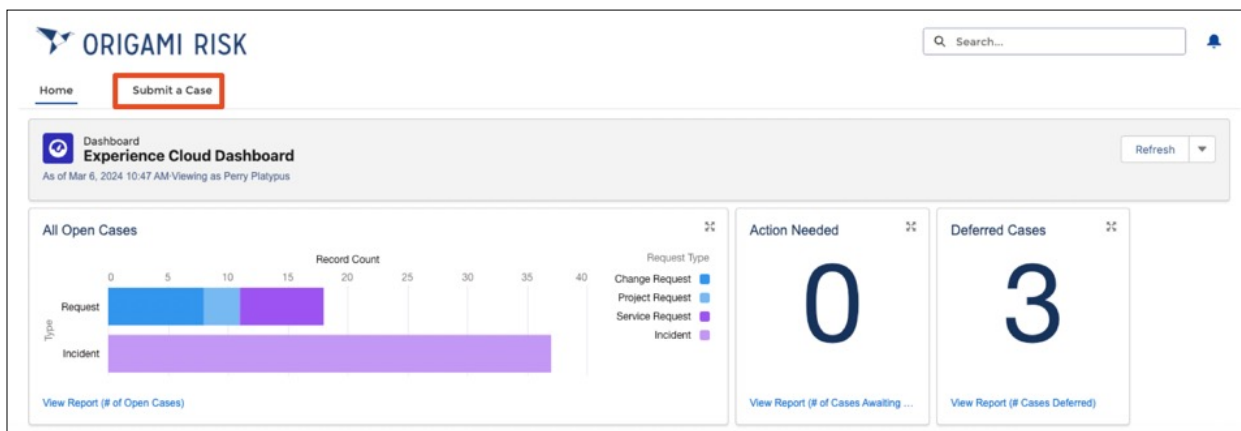5. The Client Portal home screen also includes a "Search…" box in the top right corner. Here you can enter a case number, subject, or string of text to search for specific cases.

How to Enter a New Case

Corresponding Video: 02 Entering a Case

1. Access the Case Management Client Portal

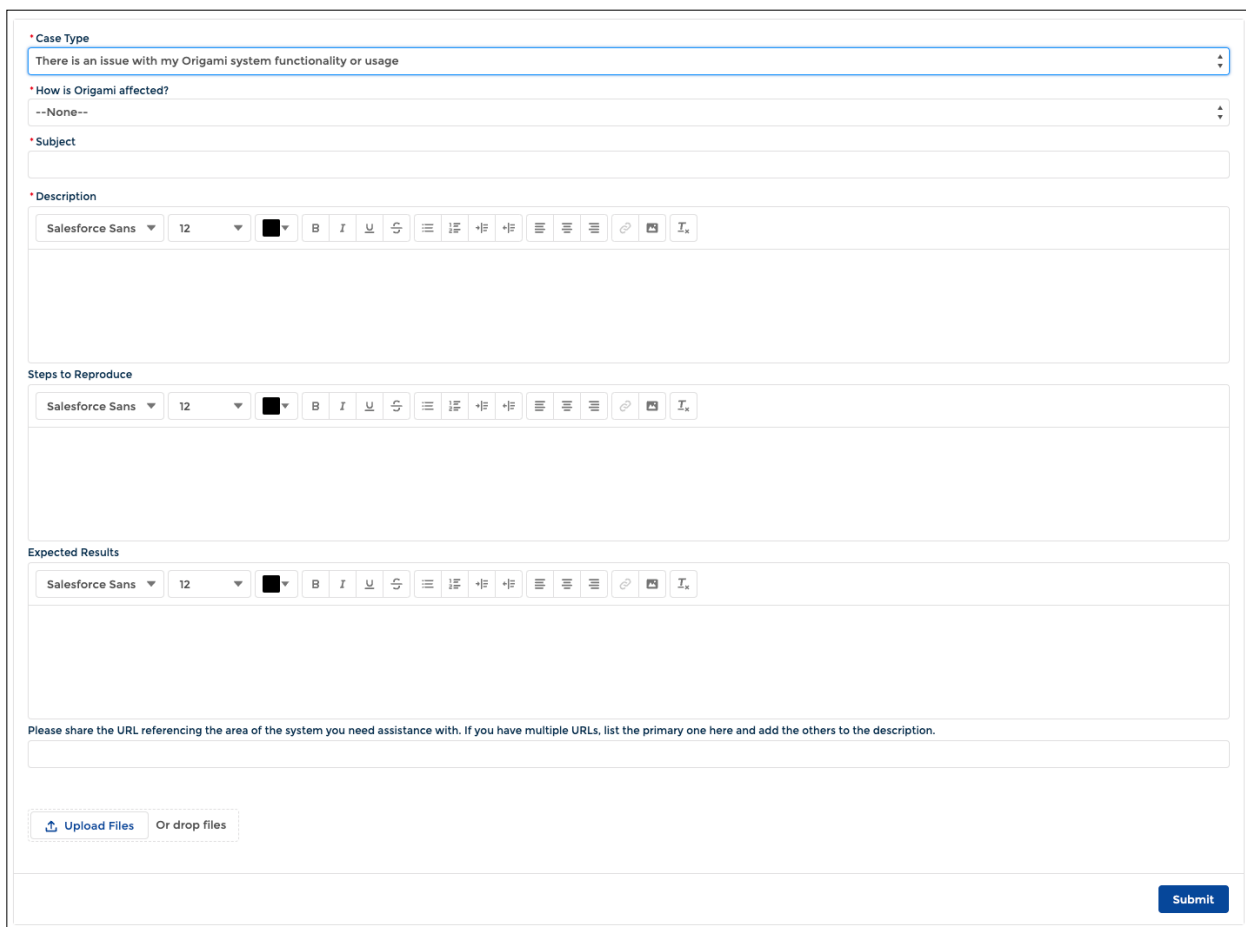2. Select "**Submit a Case**" near the upper left corner.

3. Select the "**Case Type**"

- **There is an issue with my Origami system functionality or usage:** Something in Origami is not working as it should be, you need to report a bug or system issue.
- **I have a request:** You need Origami assistance to help answer a question, provide information, make a change to the system, or help with a larger project.

4. If you selected "**There is an issue with my Origami system functionality or usage**" –
   - Select an option for "**How is Origami affected?**"
   - Enter a **Subject**. This should be a brief title that identifies the case matter
   - Enter a **Description**. This should be a more detailed description of the matter. Please include as many relevant details as possible.
   - If applicable, enter **Steps to Reproduce**
   - If applicable, enter **Expected Results**
   - If possible, please include a URL to the area of the system you need assistance with
   - If applicable, use the "**Upload Files**" button to attach files.
   - Click **Submit** in the bottom right corner to create the new case.

*Note: **Steps to Reproduce, Expected Results, and Upload Files** are all optional. This is to ensure that entering a case in the Client Portal is just as easy as sending an email.*
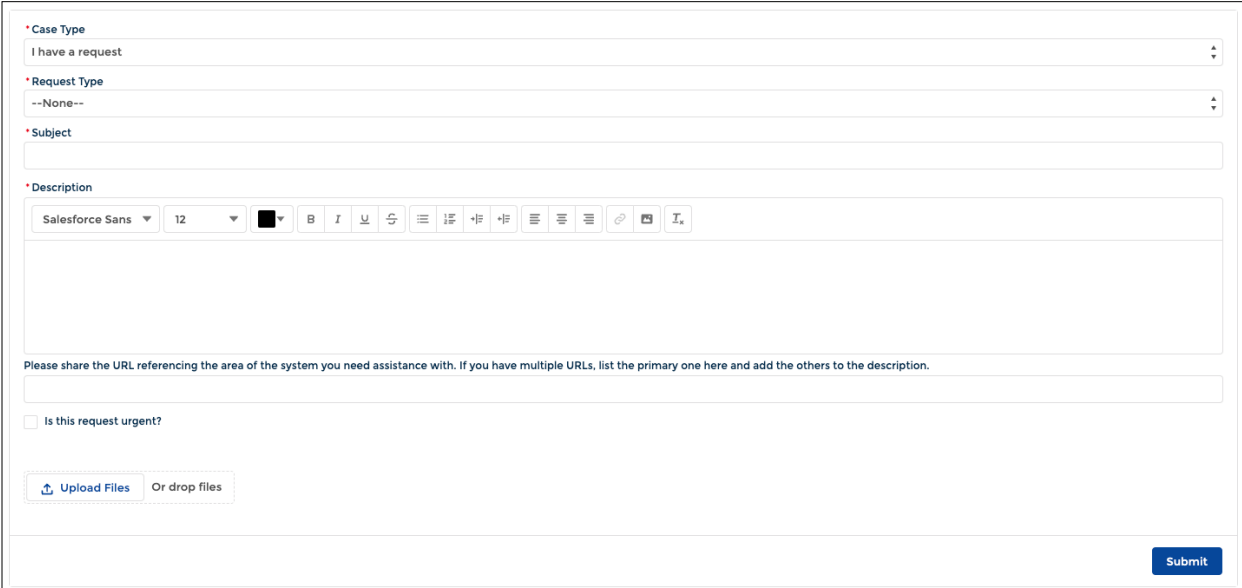
5. If you selected **"I have a request"** –
   • Select the **Request Type**
   • Enter a **Subject**. This should be a brief title that identifies the case matter
   • Enter a **Description**. This should be a more detailed description of the matter. Please include as many relevant details as possible.
   • If possible, please include a URL to the area of the system you need assistance with
   • If the request is urgent, check the **"Is this request urgent?"** checkbox
   • If applicable, use the "**Upload Files**" button to attach files.
   • Click **Submit** in the bottom right corner to create the new case.

   Note: Steps to Reproduce Expected Results, and Upload Files are all optional. This is to ensure that entering a case in the Client Portal is just as easy as sending an email.

6. After you click **Submit**, you will be brought to the newly created case.

Reviewing and Updating an Existing Case

Corresponding Video: 03 Reviewing and Updating a Case

1. Find and click on a case to open it. There are multiple ways to find a case. It is recommended to:
   • Use the "**My Account – All Open Cases**" filter from the bottom portion of the client portal home screen OR
   • Search for the case number or subject using the **Search** bar in the top right

2. Within the case, on the left side of the screen, you will see basic information about the case including the case owner, status, and priority. You will see additional information on this side of the screen depending on the case type. ***Note: On your submitted case, these fields are only editable by Origami employees. You should can use the boxes on the right side of the screen to provide updates and additional details.***

3. On the right side of the screen, you will see all the different interactions you've had with your focused coverage team and Origami Service colleagues.
   - You can post a new update using the "**Share an update**…" box
   - You can respond to updates from Origami Service colleagues using the "**Write a comment**…" box below the update you want to reply to.
   - The case owner will be notified of any posts or comments you add. Within a post or comment, you have the ability to tag specific Origami colleagues using the @ symbol if you'd like to notify someone besides the case owner.
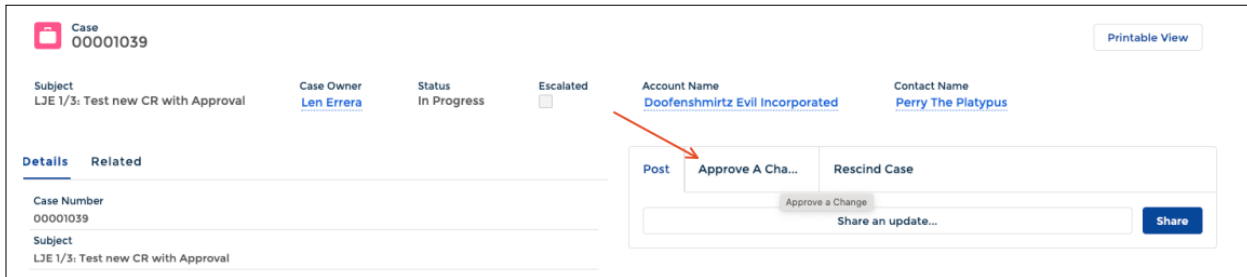
Approving a Change Request

__Corresponding Video: 04 Service and Change Requests__

1. Cases that require Origami colleagues to make a material change to your system will require your approval.

2. Once you submit a case requesting a change, your Origami team will update the case to reflect whether the request is considered a Service Request or a Change Request
   - Service Requests are smaller requests or questions that require less than an hour to complete and do not require your approval to implement. The Origami team will not update the level of effort for Service Requests because they are all assumed to be less than 1 hour.
   - Change Requests are larger changes estimated to take more than an hour to complete and do require your approval to ensure we are using your support hours as you intend. The Origami team will update the estimated level of effort on all Change Requests to reflect the estimated number of hours that change will take.

3. For a change request, review the estimated level of effort and determine if you'd like the Origami team to spend support hours implementing this change. The estimated level of effort can be found within a case on the left side in the **Change Request Details** section.
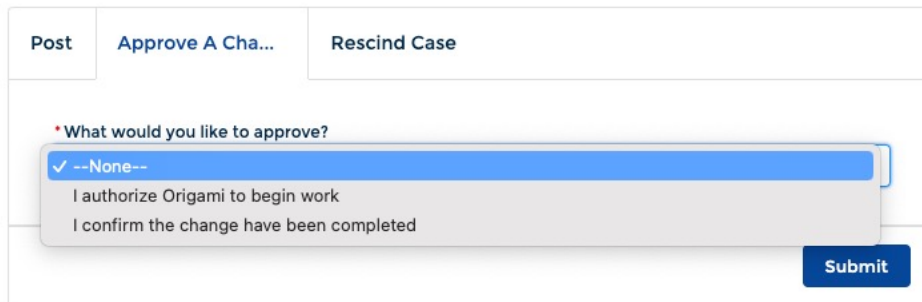
4. To approve the change, use the "**Approve a Change**" tab near the top right corner within the case.
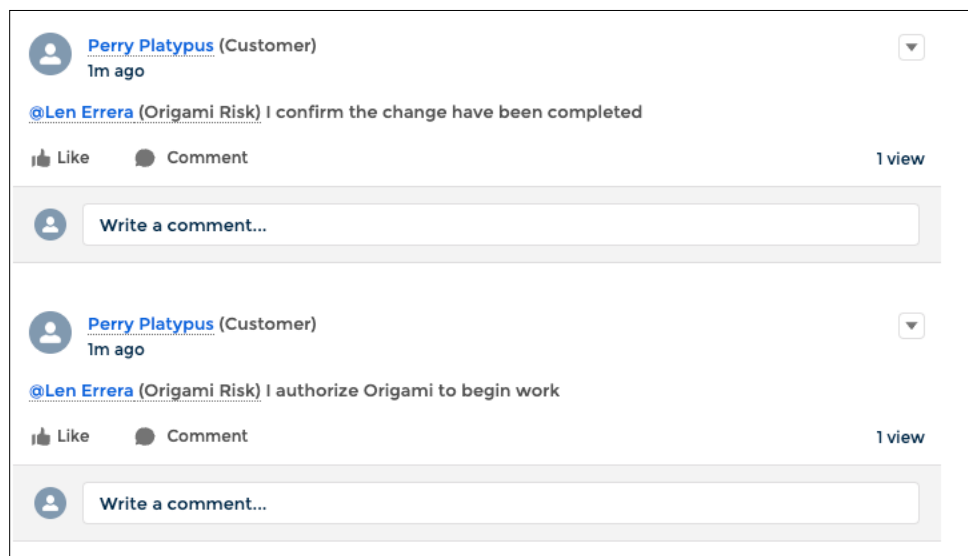
5. Select what you'd like to approve and click Submit.

6. Once you submit your approval, an update will automatically be posted within the case.

Managing Deferred Cases

Corresponding Video: 05 Managing Deferred Cases

1. You may want to defer a case due to level of effort, timing, or other reasons. If you'd like a case to be moved to a "Deferred" status:
   - Find and open the case
   - Share an update asking your Origami team to defer the case
   - Your Origami team will update the case status to "Deferred"

2. To view deferred cases, you can:
   - Click the "**View Report**" link under the count of deferred cases in the top section of the client portal home screen
   - Use the "**All Deferred Cases**" report link in the middle section of the client portal home screen

Using Case Management Reports in the Client Portal

Corresponding Video: 06 Reporting

1. On the home screen of the Case Management Client Portal, you will find various reporting options to help you understand and manage cases you've opened and that have been resolved.

2. The **All Open Cases** component at the top of the home screen shows a breakdown of all cases that are not closed by type (Incident, Service Request, Change Request, Project Request)
   • You can hover over and click on each color with the graph to filter down to cases of that type for more details.
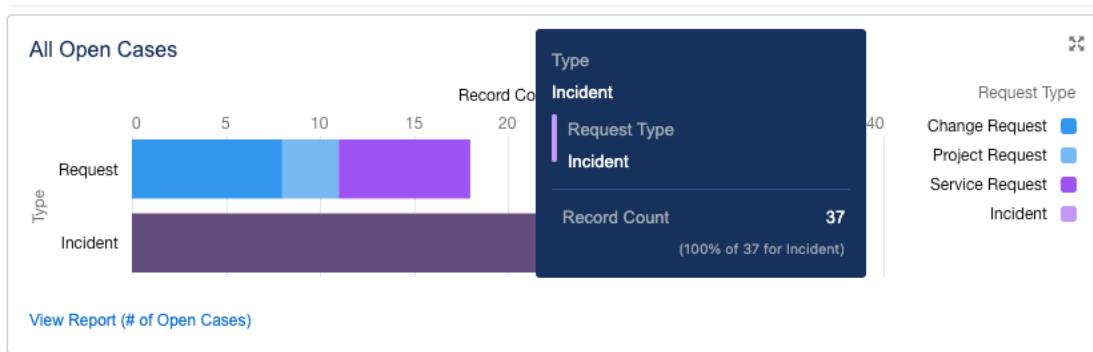
3. Origami has provided additional reports you can access from the links in the middle section of the home screen including:
   • **Closed Cases** – All cases, regardless of type, that are in a closed status
      • Last 90 Days
      • This Year
      • Last 12 Months
   • **Resolved Incidents** – All closed incidents (cases where the type = "Incident)
      • Last 90 Days
      • This Year
      • All Time
   • **Other**
      • All Deferred Cases – All Cases in a deferred status, regardless of type
      • All Cases by Type (regardless of status)
      • Closed All Time (regardless of type)

CLOSED CASES	RESOLVED INCIDENTS	OTHER
Last 90 Days	Last 90 Days	All Deferred Cases
This Year	This Year	All Cases by Type
Closed Cases Last 12 Months	All Time	Closed All Time

Questions? Reach out to your Focused Coverage Team