



ORIGAMI RISK

**SERVICE
CASE MANAGEMENT
CLIENT TRAINING**

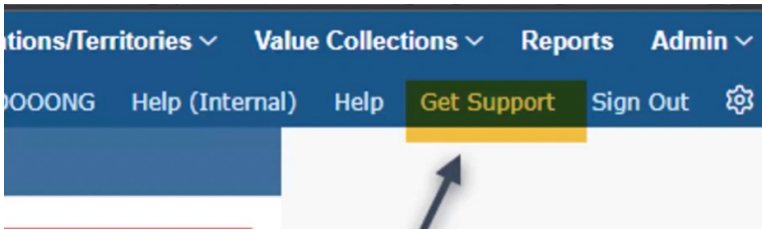
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[To view our full training video, please click here](#)

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 This Year Closed Cases Last 12 Months	Last 90 Days This Year All Time	All Deferred Cases All Cases by Type 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

My Account - All Open Cases  


50+ Items • Sorted by Date/Time Opened • Filtered by All cases - Closed • Updated a few seconds ago

	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Own...
1	00001106	Perry The Platypus	Email Notification Is Not Sending Appropriately	New	P4	3/6/2024 10:40 PM	pplat
2	00001105	Kelly Korynta	test	New	P0	3/1/2024 2:47 PM	FCT 06
3	00001104	Kelly Korynta	test	New	P0	3/1/2024 1:20 PM	FCT 06
4	00001097	Kelly Shoemake	test	In Progress	P3	3/1/2024 1:12 PM	

My Account - All Open Cases  

LIST VIEWS

- My Account - All Cases
-  My Account - All Open Cases (Pinned list)
- My Account - Cases Created by Me
- My Account - Cases Waiting for My Action
- My Account - Open Deferred Cases
- My Account - Open Incidents
- My Account - Open Requests
- Recently Viewed

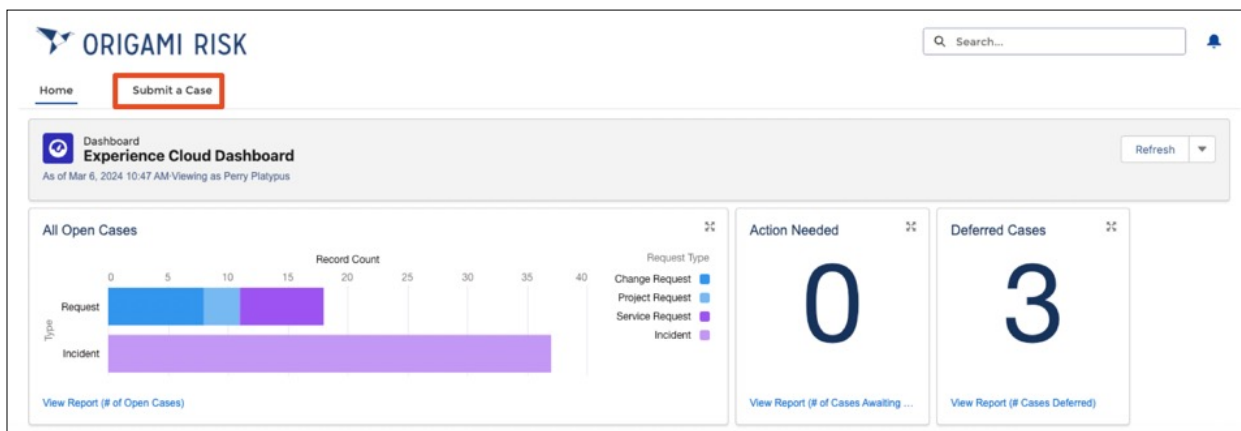
5. The Client Portal home screen also includes a “Search...” box in the top right corner. Here you can enter a case number, subject, or string of text to search for specific cases.



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**”

* Case Type

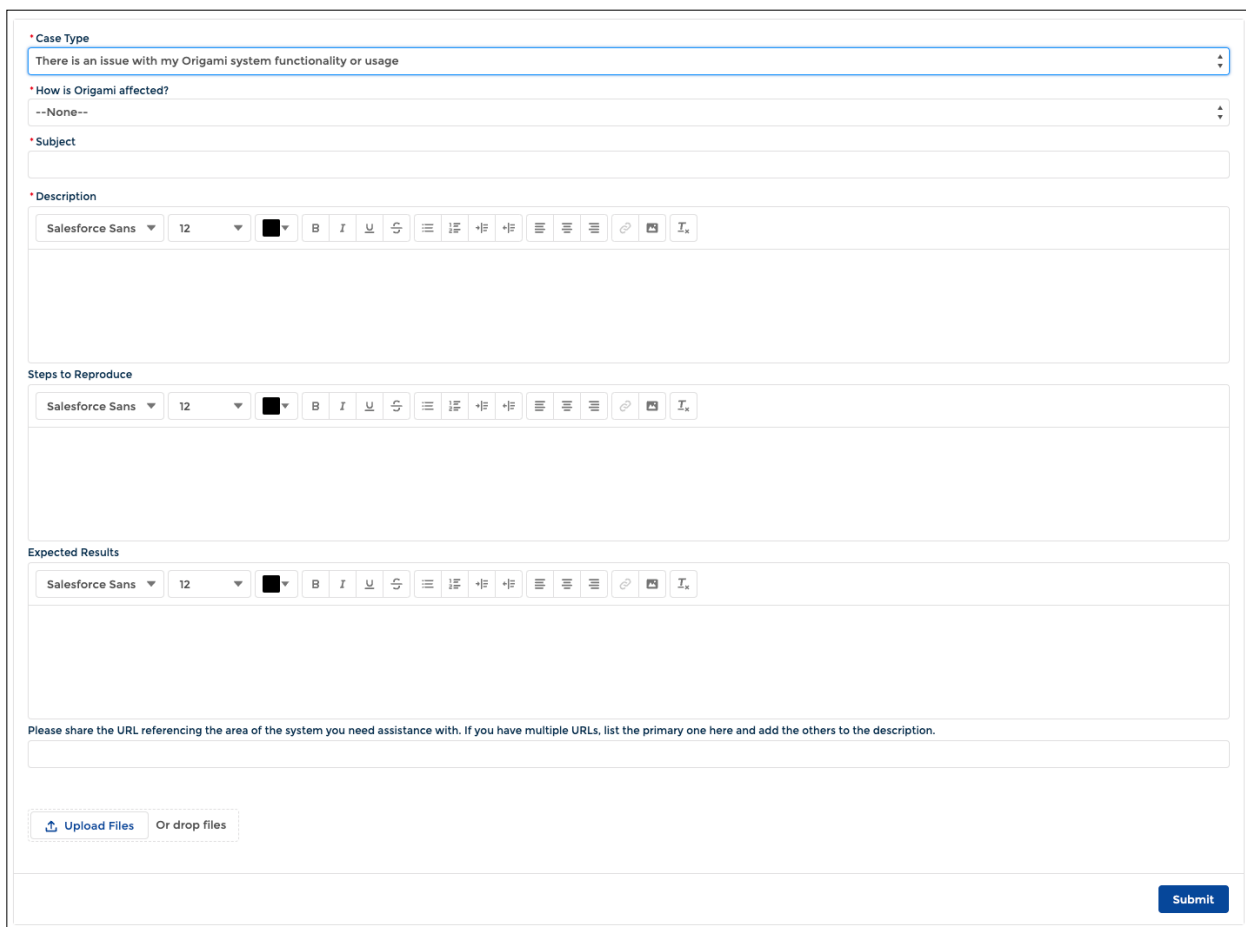
✓ --None--

There is an issue with my Origami system functionality or usage
I have a request

- **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.



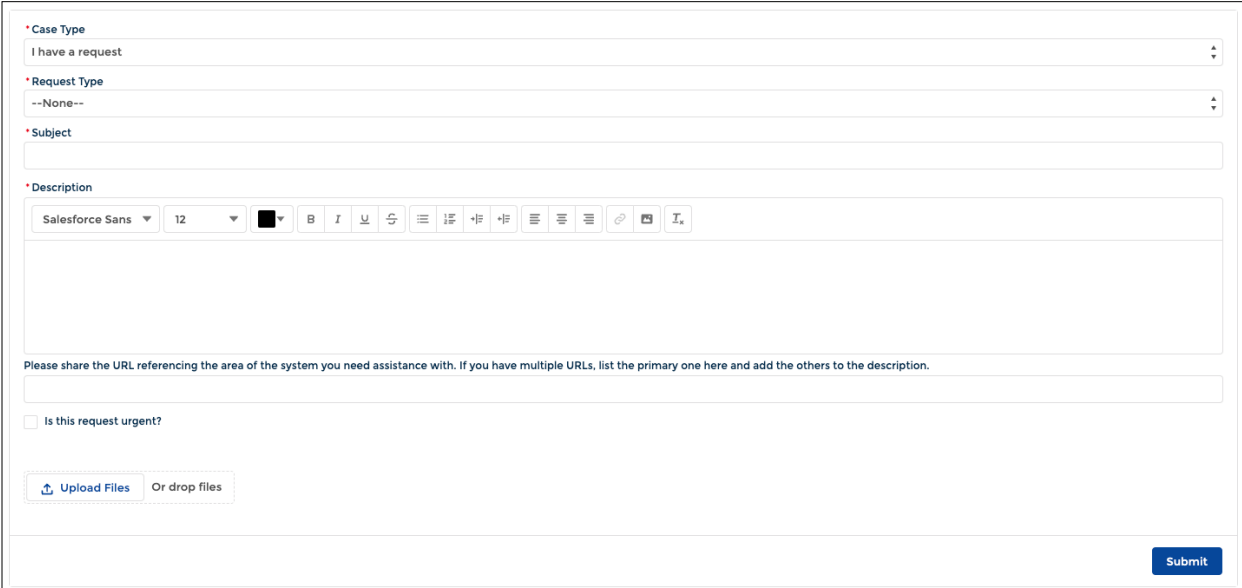
The screenshot shows a web form for creating a service case. The form is titled "Case Type" and contains several sections:

- Case Type:** A dropdown menu with the selected option "There is an issue with my Origami system functionality or usage".
- How is Origami affected?:** A dropdown menu with the selected option "--None--".
- Subject:** A text input field.
- Description:** A rich text editor with a toolbar containing options for font face (Salesforce Sans), size (12), color, bold (B), italic (I), underline (U), link, unlink, list, and image. The text area is empty.
- Steps to Reproduce:** A rich text editor with the same toolbar as the Description field. The text area is empty.
- Expected Results:** A rich text editor with the same toolbar as the Description field. The text area is empty.
- URL:** A text input field with a placeholder text: "Please share the URL referencing the area of the system you need assistance with. If you have multiple URLs, list the primary one here and add the others to the description." The field is empty.
- Upload Files:** A button labeled "Upload Files" and a text input field labeled "Or drop files".
- Submit:** A blue button labeled "Submit" located at the bottom right of the form.

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.



The screenshot shows a web form for creating a new case. It includes the following fields and controls:

- Case Type:** A dropdown menu with "I have a request" selected.
- Request Type:** A dropdown menu with "--None--" selected.
- Subject:** A text input field.
- Description:** A rich text editor with a toolbar containing options for font (Salesforce Sans), size (12), bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, outdent, link, unlink, and insert link.
- URL:** A text input field with a placeholder: "Please share the URL referencing the area of the system you need assistance with. If you have multiple URLs, list the primary one here and add the others to the description."
- Urgency:** A checkbox labeled "Is this request urgent?".
- Attachments:** A button labeled "Upload Files" and a text label "Or drop files".
- Submit:** A blue button in the bottom right corner.

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

ORIGAMI RISK Search... Home Submit a Case

Dashboard Experience Cloud Dashboard Refresh

As of Mar 6, 2024 10:47 AM-Viewing as Perry Platypus

All Open Cases

Record Count: 0, 5, 10, 15, 20, 25, 30, 35, 40

Request Type: Change Request, Project Request, Service Request, Incident

Action Needed: 0 View Report (# of Cases Awaiting ...)

Deferred Cases: 3 View Report (# Cases Deferred)

CLOSED CASES
Last 90 Days, This Year, Closed Cases Last 12 Months

RESOLVED INCIDENTS
Last 90 Days, This Year, All Time

OTHER
All Deferred Cases, All Cases by Type, Closed All Time

My Account - All Open Cases

50+ items • Sorted by Case Number • Filtered by All cases - Closed • Updated 3 minutes ago

Search this list...

	Case Number ↑	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owne...
1	00001032	Perry The Platypus	First test case	Deferred	P3	12/27/2023 2:21 PM	pnunez
2	00001033	Perry The Platypus	Test client logged case	In Analysis	P2	12/27/2023 3:07 PM	
3	00001034	Perry The Platypus	testing	New	P2	12/27/2023 3:56 PM	FCT 06

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.**

Case 00001106 Printable View

Subject: Email Notification Is Not Sending Appropriately

Case Owner: Perry Platypus

Status: New

Escalated:

Account Name: Doofenshmirtz Evil Incorporated

Contact Name: Perry The Platypus

Details Related

Case Number: 00001106

Subject: Email Notification Is Not Sending Appropriately

Description (Rich): The email notification for new claims is not always being sent out from Origami.

URL

Created By: Perry Platypus, 3/6/2024 10:40 PM

Last Modified By: Perry Platypus, 3/6/2024 10:40 PM

Case Contact Information

Team: Doofenshmirtz Evil Incorporated

Case Owner: Perry The Platypus

Assisting Resource: Contact Name, Contact Phone

Case Detail

Type: Incident

Request Type: Urgent Request

Sub-Request Type: Priority P4

Post: Approve A Cha... Rescind Case

Share an update... Share

Sort by: Most Recent Activity

Search this feed...

Perry Platypus (Customer) Just now

The subject of the email is "New Incident Notification"

Like Comment

Write a comment...

Perry Platypus (Customer) created this case. 20m ago

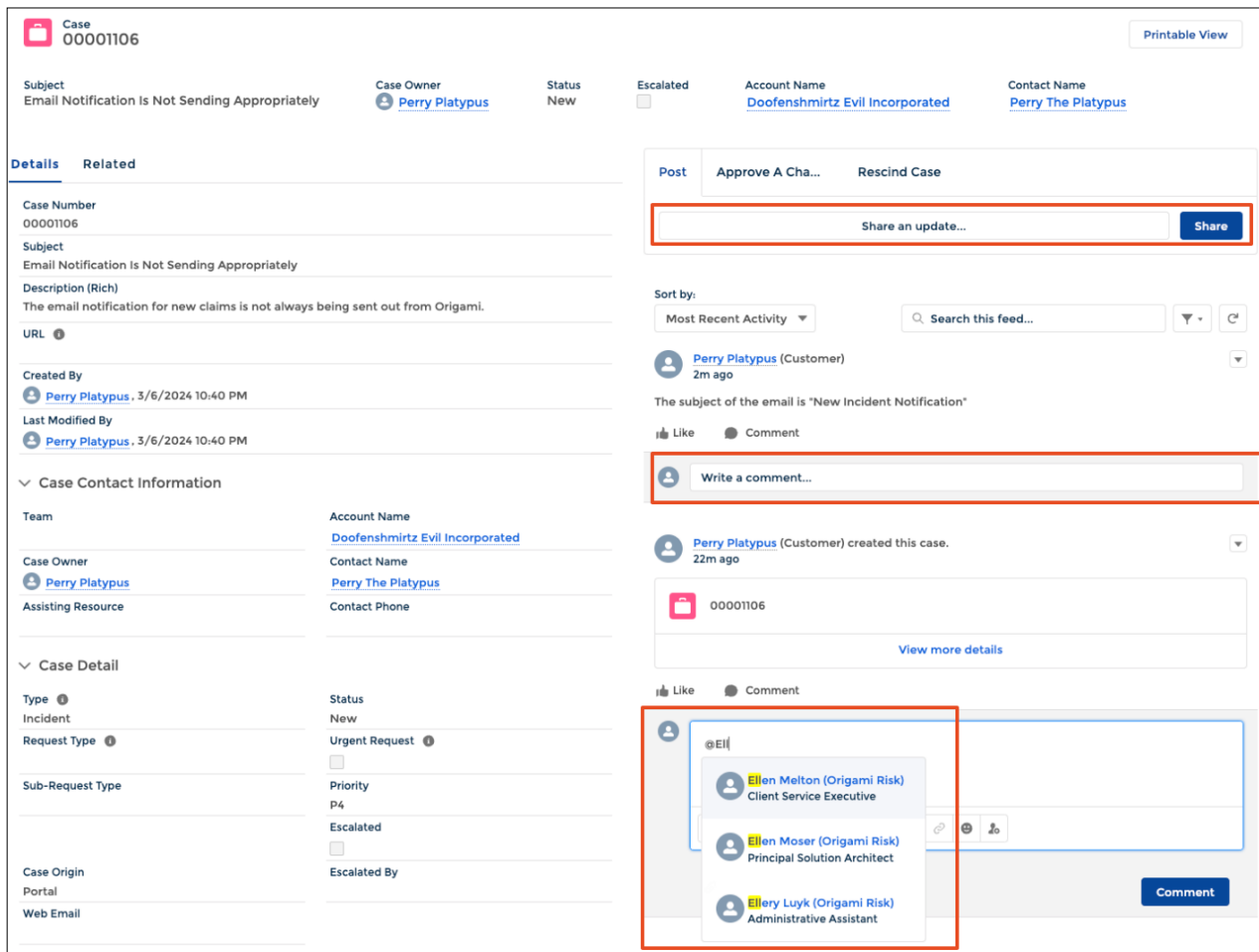
00001106

View more details

Like Comment

Write a comment...

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.



The screenshot displays the Origami Risk Case Management interface. On the left, the case details for Case 00001106 are shown, including the subject 'Email Notification Is Not Sending Appropriately', case owner 'Perry Platypus', and status 'New'. The main area on the right features a feed of updates and comments. A red box highlights the 'Share an update...' input field with a 'Share' button. Below it, another red box highlights the 'Write a comment...' input field. A third red box highlights a comment from 'Ellen Melton (Origami Risk)' which includes a list of tagged colleagues: 'Ellen Moser (Origami Risk)' and 'Ellery Luyk (Origami Risk)'. The interface also includes a 'Printable View' button, a 'Sort by' dropdown set to 'Most Recent Activity', and a search bar for the feed.

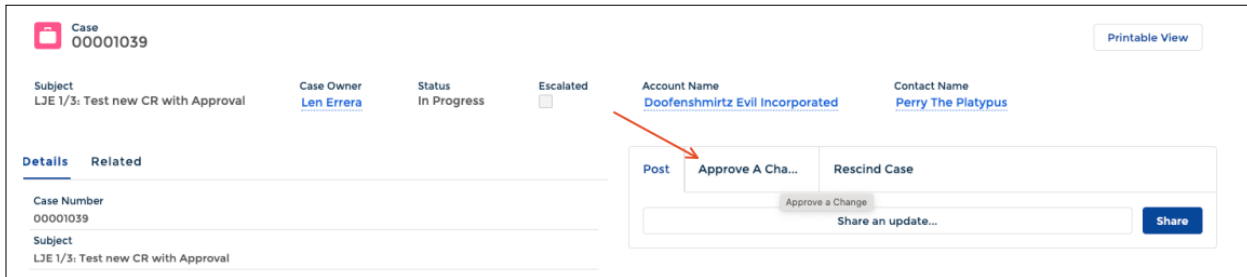
Approving a Change Request

[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.

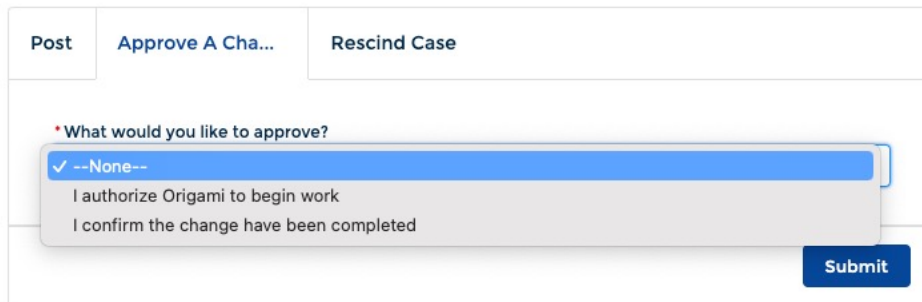
▼ Case Detail	
Type ⓘ Request	Status In Progress
Request Type ⓘ Change Request	Urgent Request ⓘ <input checked="" type="checkbox"/>
Sub-Request Type	Priority P2
	Escalated <input type="checkbox"/>
Case Origin Portal	Escalated By
Web Email	
▼ Change Request Details	
Estimated LOE S: Under 2 Hours	Deferred Request Status
Target Delivery Date 1/26/2024	

4. To approve the change, use the “**Approve a Change**” tab near the top right corner within the case.



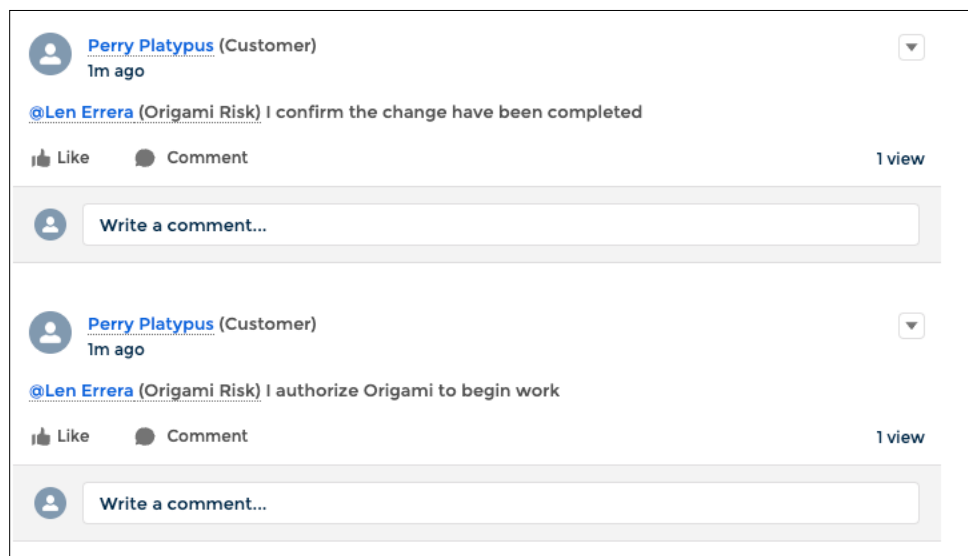
The screenshot shows a case management interface for Case 00001039. The subject is 'LJE 1/3: Test new CR with Approval'. The case owner is Len Errera, and the status is 'In Progress'. The account name is 'Doofenshmirtz Evil Incorporated' and the contact name is 'Perry The Platypus'. A red arrow points to the 'Approve a Change' tab, which is currently selected. Below the tabs, there is a text input field with the placeholder 'Share an update...' and a 'Share' button.

5. Select what you'd like to approve and click Submit.



The screenshot shows the 'Approve a Change' dialog box. The dropdown menu is open, showing the following options: '--None--', 'I authorize Origami to begin work', and 'I confirm the change have been completed'. The 'Submit' button is visible at the bottom right of the dialog.

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



The screenshot shows a post by Len Errera (Origami Risk) with the text 'I confirm the change have been completed'. The post is timestamped '1m ago' and has 1 view. Below the post, there is a comment input field with the placeholder 'Write a comment...'. The post is also visible in a list view below, showing the same text and timestamp.

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"

Case 00001106 Printable View

Subject: Email Notification Is Not Sending Appropriately | Case Owner: Perry Platypus | Status: New | Escalated: | Account Name: Doofenshmirtz Evil Incorporated | Contact Name: Perry The Platypus

Details | Related

Case Number: 00001106
Subject: Email Notification Is Not Sending Appropriately
Description (Rich): The email notification for new claims is not always being sent out from Origami.
URL:
Created By: Perry Platypus, 3/6/2024 10:40 PM

Post: Approve A Cha... Rescind Case

I'd like to defer this case for now

To: this case Share

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

ORIGAMI RISK Search...

Home [Submit a Case](#)

Dashboard Experience Cloud Dashboard Refresh

As of Mar 6, 2024 10:47 AM Viewing as Perry Platypus

All Open Cases Record Count

Request Type	Count
Change Request	10
Project Request	5
Service Request	5
Incident	35

Action Needed: 0 View Report (# of Cases Awaiting ...)

Deferred Cases: 3 View Report (# of Cases Deferred)

CLOSED CASES: Last 90 Days This Year Closed Cases Last 12 Months

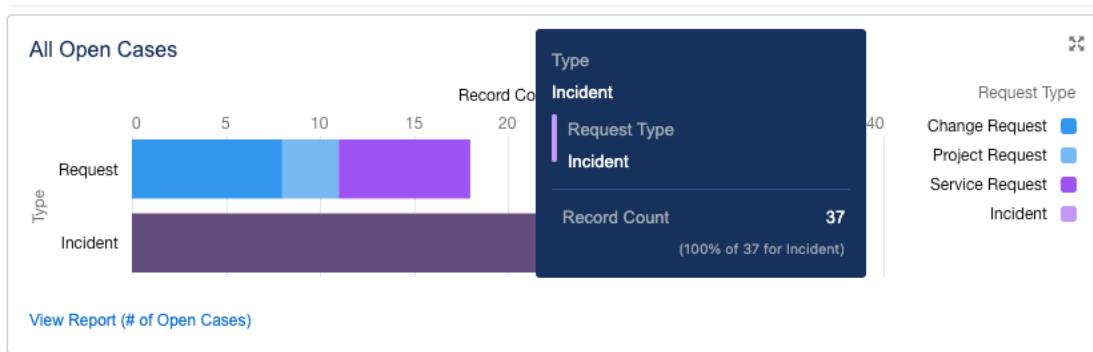
RESOLVED INCIDENTS: Last 90 Days This Year All Time

OTHER: All Deferred Cases All Cases by Type Closed All Time

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