exclaim Release Notes

exclaim Enhancements – Fern Release – August 2019

Contents

1 Overview

This product change notice summarizes the enhancements to exclaim since the last release of Elm_MR2 on April 6, 2019. The product change notice includes internal tracking numbers in the format of [EXCL-XXXX]. These internal tracking numbers are used both internally and externally when we get a request for a new idea or fix something in exclaim.

exclaim versions have botanically-themed code names in alphabetical order. This release is internally called Fern. The previous releases were named Aloe, Bamboo, Cactus, Dandelion, Elm.

2 Major enhancements

The following is a list of major enhancements that have been included in exclaim:

TRACKING NO.	TITLE DESCRIPTION
[EXCL-2824]	New Grid Control for Claims List
[EXCL-1883]	Portal - Allow additional items to be added by policyholder
[EXCL-2922]	Portal - Add Age and Condition as Mandatory fields configurable by Insurer
[EXCL-3014]	Notification event for Portal List Submission
[EXCL-3145]	Add pricing workflow to bulk copy-original items that are under a specific dollar threshold
[EXCL-3196]	Portal - Display maintenance notices on customer portal when an outage is scheduled

2.1 Enhancement Details

[EXCL-2824] - New Grid Control for Claims List

We have changed the claims list to introduce new functionality for better management and control of claims.

The claims list high level features

- List of claims are presented in a single list so that you no longer have to navigate to subsequent pages
- Change column orders
- Multi-column filtering that includes date ranges, numeric ranges, text filtering, etc.
- Ability to save multiple views and be able to select from any of your saved views
- Ability to define your own personal default
- Simple analytics capabilities that allow grouping, aggregation, counting and simple arithmetic operations.

Video training is available. To access the video training click on the following link: exclaim - Fern - Training Videos

[EXCL-1883] - Portal - Allow additional items to be added by policyholder

The policyholder portal can be reopened to accept additional items after the initial contents list has been submitted. This capability is under the exclusive control from the exclaim user through the use of a new "Portal Submissions Allowed" checkbox on the main Claim page. The control over the Policyholder portal ensures that new content items are not being added as the content items are being priced.

The Portal Submissions can also be changed at any time so that access can be revoked or re-enabled.

To share the portal with a policyholder:

1. Click the "Send Portal Link" button to invite the policyholder.
2. The "Portal Submission Allowed" checkbox will show the status as enabled indicating that the policyholder portal is open to accept content items.

To disable the policyholder portal:

1. Disable (uncheck) the "Portal Submissions Allowed" checkbox.

The policyholder will see a message of "The portal is not currently open to submit new content items. Please contact the person responsible for your claim to allow additional items to be entered."

To re-enable the policyholder portal

1. Enable the "Portal Submissions Allowed" checkbox.
2. Communicate to the policyholder that the portal can accept entry of new items. Re-enabling the portal will not automatically send the policyholder a message.

The policyholder will be able to add new content items. The previous list of content items will be displayed to allow the policyholder to see what items have already been submitted.

[EXCL-2922] - Portal - Add Age and Condition as Mandatory fields configurable by Insurer

Added support to configure mandatory customer portal fields. The Age and Condition are fields that can be configured to be mandatory based on an insurers preference.

[EXCL-3014] - Notification event for Portal List Submission

The portal submission notification email has been migrated to use exclaim's notification system. Prior to this release, portal list submissions was provided as an email to all collaborators on a claim. In this release, the portal submission will conform to the existing notification system in exclaim allowing users to subscribe and choose how they want to be notified.

When a policyholder submits the original or subsequent list of lost or damaged items, the notification system within exclaim will alert users according to their personal preferences.

To change your personal notification settings,

1. navigate to Settings > Notification Settings.
2. Select the method of notification from the list of templates or create a custom notification setting.
3. Select your personal preference from email, alerts, email and alerts.

[EXCL-3145] - Add pricing workflow to bulk copy-original items that are under a specific dollar threshold

A new method of pricing automation named "auto copy original" has been added to exclaim. exclaim has combined both auto-copy-original and auto-pricing into a single Auto Valuation action. Auto copy original allows setting the suggested replacement based on the value of the original item. If the original item unit cost is below the established price threshold it will auto-copy the original item information into the suggested replacement. In addition, you can use a configurable supplier if the original item supplier has not been provided.

The action to perform auto valuation actions is available on the Claim tab and on the Contents List tab with the "Find Replacement" button. When you select auto valuation ("Find replacement for xx item(s)"), a dialog will present a list of options to select. The list of options include the auto-copy items original price, the name of the supplier if the original item supplier is not provided and a choice to include auto-pricing of items (if enabled for your organization). The default values are determined by your organization configuration and your personal preferences but you can change the value according to your needs.

Auto-valuation will only apply on items that have no assessed replacement. If both auto-copy original and auto-pricing are selected, it will process the auto-copy original rules first and then apply auto pricing.

[EXCL-3196] - Portal - Display maintenance notices on customer portal when an outage is scheduled

The customer portal will display a maintenance notification when an exclaim notification of an upcoming software release and a policyholder accesses the Customer Portal.

3 Minor Enhancements

The following is a list of minor enhancements and bug fixes in exclaim.

TRACKING NO.	TITLE DESCRIPTION
[EXCL-3200]	Change the rounding on receipt report calculations
[EXCL-3525]	Add ability to export content item Photos and Documents from exclaim
[EXCL-3552]	Restrict unsupported insecure browsers from connecting to exclaim (IE7, IE8, IE9)
[EXCL-2849]	Cannot enter a decimal number for Depreciation Rate when using Bulk Action option
[EXCL-3604]	Cannot enter Portal if claim has been previously closed and then re-opened.
[EXCL-3662]	Portal age of 0 (0 years or 0 months) would save the content item with no age
[EXCL-3648]	Allow insurers to run the report "Cover Page" with missing assignee information
[EXCL-2647]	Receipt order within a Content Item is not sorted in receipt management or receipt reports
[EXCL-2662]	Claim Replacement Reports show the Room and Item Class as a Replacement instead of showing the suggested replacement for items

3.1 Enhancement Details

[EXCL-3200] - Change the rounding on receipt report calculations

exclaim has updated the receipt tax calculations with improved and more consistent rounding of applicable calculations.

The receipt calculations will affect all of the Replacement content reports in exclaim. Note, that there may be some discrepancies when regenerating receipt reports for historical claims.

[EXCL-3525] - Add ability to export content item Photos and Documents from exclaim

exclaim has enhanced the download photos capability to include both photos and documents in a single download file.

To download photos:

1. Navigate to photo manager from the Claim tab
2. Select Download
3. Enable all that apply from the available options
    ○ Content Photos
    ○ Content Documents
    ○ Claim Photos

[EXCL-3552] - Restrict unsupported insecure browsers from connecting to exclaim (IE7, IE8, IE9)

exclaim will restrict logging into exclaim when using unsupported and insecure browser versions. exclaim will restrict access from Internet Explorer v7 (IE7), Internet Explorer v8 (IE8) and Internet Explorer v9 (IE9).

The reasons for this:

1. Security - These browsers no longer receive security updates from Microsoft and therefore present risks in data transmitted between a user's computer browser and exclaim.
2. User experience - exclaim is continually evolving to support new and improved features. Unsupported browsers will not be able to take advantage of any new or enhanced functionality and therefore present a usability issue for the user.

When attempting to login from any of the unsupported browser version, the login screen will not display the login username and password but instead display a message like "Microsoft Internet Explorer 8 is not supported by exclaim. The technologies used within exclaim require that you use Google Chrome or Microsoft Internet Explorer version 10 or later or Microsoft Edge"

[EXCL-2849] - Cannot enter a decimal number for Depreciation Rate when using Bulk Action option

Added support for decimal depreciation rates when using the group/bulk actions. Prior to this release a user could only enter in whole numbers as the depreciation rate.

[EXCL-3604] - Cannot enter Portal if claim has been previously closed and then re-opened.

Fixed an issue where a policyholder was unable to submit a content when the original claim was previously closed.

[EXCL-3662] - Portal age of 0 (0 years or 0 months) would save the content item with no age

Addressed an issue where if a content item was entered with an age of 0 that it would save that content item with no age. The age has an effect on the depreciation where the depreciation rate for an item with 0 age is different than no age.

[EXCL-3648] - Allow insurers to run the report "Cover Page" with missing assignee information

Fixed the Cover page report which would not generate any output if there was missing claim information.

[EXCL-2647] - Receipt order within a Content Item is not sorted in receipt management or receipt reports

Changed the order of the receipts to be consistent with how the receipts were entered.

[EXCL-2662]- Claim Replacement Reports show the Room and Item Class as a Replacement instead of showing the suggested replacement for items

Changed the receipt reports to consistently show the suggested replacement.

4 Browser Support

The following is a Microsoft Support Advisory for Internet Explorer 7, 8, 9, and 10.

"Beginning January 12, 2016, only the most current version of Internet Explorer available for a supported operating system will receive technical support and security updates. Please visit the Internet Explorer Support Lifecycle Policy FAQ here http://support.microsoft.com/gp/Microsoft-Internet-Explorer for list of supported operating systems and browser combinations." – Microsoft Support

exclaim supported web browsers are Microsoft Internet Explorer 11, Microsoft Edge and Google Chrome.

As of this release, support for IE7, IE8 and IE9 has been revoked.

5 Support

If you require additional assistance, please contact support@edjuster.com or call +1 (866) 779-5950 option 2.