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OPTINS

scoop



Brandy Woltkamp has transitioned from a Product Specialist III to Senior Application Support Analyst.

Brandy Woltkamp – Same Person, Different Role

By Alex Rogers
Product Specialist I

In January, Brandy Woltkamp will celebrate her sixth year anniversary with the NAIC. In April, Brandy transitioned from a Product Specialist III to a Senior Application Support Analyst. In her new position, Brandy specializes in identifying technical related issues, as well as assisting in the design and enhancement process of the OPTins application. The transition from the implementation team into her new position has been seamless and Brandy is pleased that she is still able to work with customers, albeit in a new way as well as working in depth to determine new enhancements, features, and usability of the applications.

Brandy's newest hobby outside of the workplace is updating her new home. She has a long list of home improvements to make and welcomes any volunteers to help. During the current holiday, Brandy plans to relax and spend a lot of time with her family.

If you normally work with Brandy on any state updates or implementations, please contact the OPTins marketing team at optinsmktg@naic.org and someone will be happy to assist you.

Keyboard Shortcuts – Not Just for OPTins

By Alex Weber
Software Quality Engineer II

Keyboard shortcuts are some of the most overlooked features when using a computer. They can be hard to remember and hard to find, but once they are utilized, they save time and effort. OPTins has compiled a list of the most helpful shortcuts to make your filing process easier, faster and more fun! These shortcuts can be used in any Window's-based computer application.

Commonly Used Keyboard Shortcuts
(*+ indicates holding keys at the same time)

Copy (Ctrl + C)
Allows you to copy any highlighted text.

Cut (Ctrl + X)
Cuts the highlighted text from a text field. (Cutting is the same as copying except that it removes the selected text from where it was originally highlighted.)

Paste (Ctrl + V)
When Paste is selected, anything that was copied or cut will now appear again in a text field.

Select All (Ctrl + A)
Place your cursor on a body of text that you would like to select (highlight), and then use this shortcut. All of the surrounding text will highlight, allowing you to quickly write over the content, copy, cut or delete (in the case of a text field).

Undo (Ctrl + Z)
Have you ever accidentally deleted a giant chunk of text? Maybe you rewrote content and then decided that what you had before was better. This shortcut will become your best friend at these times by undoing your most current edits.

Find (Ctrl + F)
Allows you to search for a word(s) on a page. When you select this shortcut, a field will appear in your browser that allows you to search for the content that you would like to find on that current page.

If you have a shortcut that is not listed here, please send an email to optinsmktg@naic.org and let know. We may feature your shortcut suggestion in a future newsletter article.

OPTins User Audits - It's a Team Effort

By Brandy Woltkamp
Senior Application Support Analyst

The OPTins team soon will be contacting via email all individuals whose username contains the role of User Admin Requestor. This communication will ask those individuals to conduct an audit of the active logins on each OPTins account to ensure that all users of OPTins are active and have the roles necessary to work within OPTins on a daily basis.

We ask that you take part in this voluntary audit of your users by January 23 so that we can start out 2015 with the knowledge that logins are up-to-date. OPTins has many different roles available for our users. Please review the roles below to ensure that all users have the appropriate authority for their login. Also, note that everyone should have their own unique username. Users should never share logins with one another.

Industry-Roles	Description
Filer	This role allows users to create a filing/amendment and save the filing as a draft for Schedule/Submit Filings users to submit at a later date.
Schedule/Submit Filings	This role allows users to create a filing and save the filing as a draft. It also gives users the ability to schedule a filing to be submitted at a later date or submit a filing on the date created.
Read-Only	This role allows users to have read-only access to search/view filings.
Filing Entity Administrator	This role allows users to make changes and additions to all entities on the account.
EFT Report Reviewer	This role allows users to run an EFT report to reconcile their OPTins transactions against their bank statement.
User Admin Request	This role allows users to request new users, update current user roles and deactivate users on behalf of their account.

State-Roles	Description
Regulator	This role allows users to review submitted filings, amend filings and create paper filings.
Submit Filings	This role allows users to submit filings that include a state payment.
Paper Filing Delete	This role allows state users to delete filings.
Read Only User	This role allows state users read-only access.
EFT Report Reviewer	This role allows users to run an EFT report to reconcile their OPTins transactions against their bank statement.
Configuration Manager	This role allows users to maintain state configuration settings, including: Filing Periods, Payment Types, Company Types and the Filing Requirements part of Filing Configurations.
State Specific Field Administrator	This role allows state users to maintain state-specific fields.
Filing Entity Administrator	This role allows users to add new and edit existing filing entities on their account.
Not Filed Report User	This role allows state users to run the not filed reports.
Enhanced Export	This role allows users to request a complete export to be transformed from the standard XML to another output style.
Transaction Maintainer	This role allows users to view and maintain the payment balance totals of filing entities that have filed to their state account.
Transaction Viewer	This role allows users to ONLY VIEW the payment balance totals of filing entities that have filed to their state account.
User Admin Request	This role allows users to request new users, update current user roles and deactivate users on behalf of their account.

Online Help - It Just Makes Sense!

In addition to the excellent team of help desk analysts that we have on staff, OPTins has an online help portal, located within the application, with various topics of information, designed to help answer your questions.

Located within the OPTins application, in the top right, click on the Online Help link, and a new window will open with four available categories:

- User Manual – The industry and state user manuals contain detailed information about all parts of OPTins. Ample screen shots with simple explanations will help users navigate through the application.
- Release Notes – Clicking on this link opens the most current version of OPTins Release Notes. This document explains everything that was added, updated or changed in the most recent release.
- On-demand Tutorials – This link leads to a page where you can access on-demand tutorials. You can view these tutorials at any time.
- Help Topics – We have developed a variety of help topics. These topics are quick reference guides to specific areas of OPTins. Click on the topic for which you need guidance to read short and simple instructions on that topic.

If you have questions after reviewing Online Help, please contact the OPTins Help Desk at optinshelp@naic.org.

2014 Makes OPTins Better Than Ever!

By Michelle Wilson
Product Specialist II

The OPTins team recently made several upgrades to the OPTins application based on your feedback.

The August release of OPTins contained new enhancements to the filing search screen. To make searches more user-friendly, the look and feel of the search screen, as well as the functionality of the search fields, have been streamlined. Search fields have been broken into Simple and Advanced search categories, easing the functionality's use. Advanced Search criteria can be found by clicking More Search Fields in the search bar.

One of the biggest changes to OPTins happened in late September, when the application was released on JBoss. This created a new URL link for the website and improved performance for all users.

The latest release to OPTins came in late October. EFT Reports can now be run for each individual state filed to rather than all states in one report. Additionally, OPTins now gives industry filers the option to receive an email confirmation when submitting new filings electronically.

Keep an eye out for future OPTins enhancements and, as always, feel free to contact the OPTins Help Desk at optinshelp@naic.org should you have any questions or concerns.

OPTins Welcomes Four New Employees

By Michelle Wilson
Product Specialist II



Pictured from left to right: Alex Weber, Caleb Green, Chris Mullins and Jessica McMillen

Jessica McMillen started on the OPTins team as a Product Support Intern in July and moved into a Customer Support Analyst I position in early December. She attended Grinnell College and graduated in May 2014. She likes to read, binge-watch shows on Netflix and do yoga. She says the people at the NAIC are one of the best parts of working here, and there always seems to be some delicious food to sample. (The OPTins team does not starve.)

Welcome to the team, everyone!

The OPTins team recently welcomed four new members to the OPTins team.

Chris Mullins and Alex Weber joined the team in late September, each starting as a Software Quality Engineer II on our QA team.

Chris left a position as a Principal Applications Analyst for his new role at the NAIC. Chris says he really likes the culture at the NAIC. When Chris is not working at the NAIC, he enjoys playing the trombone and sampling different beers (but not at the same time). Also, Chris is looking forward to getting married in March at the historic Union Station here in Kansas City.

Alex worked as a Quality Engineer for a small company prior to coming to the NAIC. Two of the things he likes about working at the NAIC are the opportunity to learn more about the technical niche and the work-life balance. Alex is a published songwriter, once writing a song that was recorded on a Korean Christian worship music album and sold overseas!

Caleb Green is a new product support intern, joining the team in July. He's currently studying to become an aerospace engineer and is a big Kansas Jayhawk fan. In his free time, he likes to make chainmail. He enjoys the flexibility the NAIC offers and its location to many great lunch spots.



OPTins Help Desk Staff

Back Row: Andy Hartman, Bryan Hartwell, Nick Fosgate
Front Row: Rick Kelso, Jessy McMillen, Brandy Woltkamp, Connie Lancaster



OPTins Implementation Team

Back Row: Cait Wingard, Alex Rogers, Jennifer Franz
Front Row: Joy Morrison (Assistant Director), Michelle Wilson, Courtney Mayorga (Product Implementation and Support Manager)



OPTins Business Analysts

Back Row: Chris Bien, Jeff Gates
Front Row: Stacie Donner, Jennifer Lingenfelter

*Not pictured: Diane Talbot and Bridget Kieras

We hope your holiday was merry and bright.
Happy New Year!