

USER GUIDE

PROJECT MANAGER



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Project manager role

If your company has been allocated a project management task in a case, you will see the task in the task list in the specific case.

Depending on the insurance company configuration, some steps might already have been done by the insurance company in question.

NOTE! In order for your company to be assigned Project management tasks, the task needs to be selected as a provides service in the office information, via Company admin.

Go to the Project management task and click *Edit* above the map in order to assign a project manager. You can also assign a project manager by clicking *Assign members* under the tasks.

4 * Water inspecti	Task information	Multimedia	Milestones	Extras	
O+ Project manage	Work number: Size:			(58.7	ct management: In4mo Training - Espoo km) Log
C Drying	Task: Start time:	Project manag 24.09.2019	ement	ASSI	Monninkylä
Assign members Log	End time: Estimated partner budget:	EUR	hange project ma Dwn office v	1	×
Create new MEPS file	Approved partner budget: Description:	EUR			Save Cancel Jackarby

The project manager needs to look over the case in order to determine needed actions. Your main tasks are to set the timetable for the entire case, check that the work is done properly and report the progress of the case if desired.



If a positive compensation decision is made and after the project manager is chosen - the task switches the status automatically to \mathbf{Rt}

If the main inspection is not in status **A**, the project manager can still assign and set timetables for tasks.

You can add/remove tasks in a case by clicking on *Add/remove case tasks* under the task list. You can add two tasks of the same type in one case if needed. In

Project management: In4mo T	raining -		
Espoo		Inspection tasks:	â
Project manager: Fanny Servic	e	General inspection	0
Case information		Water inspection	Main inspection
		Fire inspection	0
		Nature event inspection	0
4 * Water inspecti		Content inspection	0
	Task info	Tasks:	
Project manage		Project management	First aid
Add/remove case tasks	Work nu	Demolition	Drying
	Size:	Fire cleaning	Cleaning
Add/remove case tasks	Task:	Contents handling	Carpentry work
Log		Brickwork	HVAC work
Assign partner Log	Start tim	Plumbing, Outdoors	Clearance
Assign members Log	End time	Plumbing, Indoors	Roofing
Assignmenibers	Estimate	 Locksmithing	Painting
	partner	Steel work	Electrical work
		House construction	Glass work
	Approve	Flooring	 Tiling
Create new MEPS file	partner	Extra tasks	
	Descript		
Measurements			Save

this case, you need to click on *Extra tasks* and choose an extra task.



Assign tasks to companies

Once you have added the tasks, you might be able to assign the tasks to your own company or to another partner of the insurance company, that is if the insurance company has given you this possibility.

Click *Assign partner*, select the tasks you wish to assign to the same company, select the partner from the list and click *Save*.

i	11411	Cases News My calendar Project calendar Fanny S e tasks to one office Refresh	ervice Chat history Company admin Support Requ	est for MMR300 Sign out
<	Tasks ⇒ Demolition ⇒ Case I C De	Expertise	Test company - Tapiola (58.7 km) Vulnerability Partner - Helsinki (68.7 km) (Mmo Training - Espoo (58.7 km) Vulnerability Service - Vulnerability Service Office (58.8 km) ContractorCo - Espoo (58.8 km) ContractorCo - Chaitemi (65.7 km) EasyFix - Espoo (68.7 km) ContractorCo - Kaitaa	, og C
	Log	Notes: Edit	Kerškoo IIby	ancel

Alternatively, you can assign the task(s) to a partner in the task by clicking *Choose*.

A * Water inspecti	Task information	Multimedia	Milestones	Extras			
B [‡] Project manage	Work number:					bsel Log	
> C Demolition	Subcontractor work number:		Demolition	Assig	gnee: Log	×	3
C Drying	Size:		Please select an o				
Add/remove case tasks	Task: Start time:	Demolition	Select from reco (58.7 km) In4mo Non-in4mo pa	Training -		~	18
Log Assign partner Log	End time:		Choose tasks:				ø
Assign members Log	Description:		Project manage				lackarby
	Edit		Drying Notes: (Max 480	characters))		
Create new MEPS file							2
Measurements							
Documents [1] 🥔						.1	prooration
Chat room						Save Cancel	a mente
Cash offer						4	

Solera in4mo

Assign tasks to responsible employees

You can only assign tasks to employees which are allocated to your own company.

Choose the task you want to assign a responsible person for in the task list and click *Edit* on the right under the chosen office name.

Espoo	🗇 Edit task	×	
Project mana	Start time:		
Case infor	24.09.2019		Invoice Project plan
	End time:		
A * Wat	24.09.2019		
A vvat	Description:		ctras
B‡ Proje			Demolition: In4mo Training - Espoo (58.7 km)
> 0+ Demc			Choose Log
	For the second s	.::	Assignee: Edit Log
0+ Dryin	Employees: Assignees: M Service Fanny Service	<u>^</u>	Subcontractor: Choose Log
	in service in anny service		Subcontractor assigned: Log
Add/remove			× × × × × × × × ×
Log	*		Monninkylä
Assign partn	· · · · ·		
			Kerkkoo IIIby
Assign mem		~	Kerkkoo
	Whole company 🗸		Jackarby
	Own office		Pero Santa
Create nev	Whole company 43 Save	Cancel	
Measureme	nts	^	Hamari

If needed you can fill out information of the task in the *Description* box, but it is not mandatory.

Choose the option *Whole company* from the dropdown list, if you can not find the person you want to assign the task for. On the member list you will only see the employees who are certified.

Mark the name you want to choose and move it from the first box (*Employees:*) to the one beside it (*Assignees:*) by clicking the arrow.

When a task has been assigned to a responsible person the status switches to status 1

If possible, try to set an estimated start and end date for the task. The dates can be updated at any time from both the web portal and the mobile application.

When start and end dates are set along with a responsible person, the status will switch to $oldsymbol{2}$



Multiple task assignment

You can also assign multiple tasks to responsibles at the same time and/or set a startand end date for all the tasks at once.

When your company has been assigned new tasks, press *Assign members* under the task list. In the view that opens you will see all the tasks assigned to your company.

	Assign members		×
Project management: In4mo Tr Espoo Project manager: Fanny Service Case information	Water inspection: Inspector:	16.09.2019 16:10 Fanny Service X Edit	
A * Water inspecti	Project management Project manager:	Edit	
Bt Project manage	Demolition: Description:	24.09.2019 - 24.09.2019	
2 Demolition	Assignees:	Fanny Service X Edit	
> 0+ Drying Add/remove case tasks	Drying: Description:	Start date - End date	
Log Assign partner Log	Assignees:	Edit	
Assign members Log		Save Cancel	

You can write descriptions and set and/or modify start and end dates for the tasks. To choose or edit assignees, click *Edit* next to *Assignees*.

Select the responsibles and define which tasks they will be assigned for by selecting the right tasks next to assignee's name. Click *Save* when you are ready.

Employees	Assignees		Water ins	spectionProject mar	nagementDemol	itionDrying
Fanny Service M Service Own office	Fanny Service	X	۲	۲		

Press the x-sign next to the assignee's name or untick specific tasks if you want to remove the person from a task.

NOTE! If a user is not certified, then it is not possible to select a task for this specific user. In this case the system informs it with a \bigotimes when you have the mouse over a selection box.

Click on the fields for start and end dates to choose or modify start and end dates for each task. As default, when you click on the *Start date* field and choose a date from the calendar, the system will automatically fill out the *End date* field to be the same date so this needs to be edited. When modifying the dates that have already been set after saving, the system asks (which is optional to fill in) what is the reason for the changing of dates.



Add budget to task(s)

Generally all tasks (except inspection, first aid and project management) require a budget to be accepted by the insurance company before the actual reporting can be start from the mobile application. That is, if the insurance company has not pre-approved the budgets for tasks.

The company that has been assigned for the task is also responsible for adding the budget, meaning you can only add budgets to your own tasks. Budget can only be added when the task is in status **2**

To add the budget (there are two options to choose from):

A) Go to *Task information* in a task and click *Add budget for task(s)*.

OR

B) Click the *Budget* sub header of the case and click *Add budget for task(s)*.

Case information	Cost control	• [Budget	► Inv	oice B)	Add budget	Project plan for task(s)	Refresh
Related tasks	V	/I-description	Show less	Budget	Ma	iterial Cost	Lo	g
A * Water inspecti	Task information	Multimedia	Milestones	Extras				
B‡ Project manage A	Add budget for ta Work number: Subcontractor work number:	ask(s)		Assignee: Subcontra	Fanny Servi	raining - Esp ice Edit Log Choose Lo ned:) Log
Add/remove case tasks	Size: Task:	Demolition		M	onninkylä		11	E CONTRACTOR

In the view that opens, add a short description for the budget, the total amount *excluding material*

and VAT and attach a budget calculation file from your PC. **NOTE! Without a budget calculation file, a budget cannot be sent for approval.**

Select the task(s) that are related to the budget. You can also add a comment for the budgets if you want to, but this is optional.

When ready, click *Send for approval* and the tasks you have sent in a budget for

в

approval, switches to status

Add budget for task(s)	×
Short description:	
Budget excluding material and VAT:	EUR
Material cost excluding VAT:	EUR
Budget calculation file:	Choose from computer Selaa Ei valittua tiedostoa.
Please select an office:	In4mo Training - Espoo 🗸
Tasks:	Demolition
	Drying
Comment:	
	Send for approval



Updating budgets

If the budget needs to be edited, go to *Budget* on the sub headers and click *Edit* on the right of the task under *Log*.

NOTE! A budget and the calculation file can only be edited/changed when the budget is either rejected or approved.

When a budget is approved, the status of the task switches to ^{B‡} and the WI (Work Item) description field turns to green from yellow.

When the status of the task is *B*++ the reporting from the mobile application can start.

When a budget is rejected, the status of the task goes back to *2*. The description field is then red. Go then back to *Edit* and update the information.

Case information	Cost control	Budget	Invoice	→ Pr	oject plan
				Add budget fo	or task(s) Refresh
Related tasks	WI-description		Budget	Material Cost	Log
Drying Demolition	Budget 🥔		20 000,00 EUR	EUR	Edit
Fire cleaning	Budget 🥔		56 000,00 EUR	EUR	Edit
Cleaning	Budget 🥔		89 000,00 EUR	EUR	

When a budget	n4mo Dashboard	Cases News My calendar Project calendar	Fanny Service Chat history Compa	any admin Support Re	quest for MMR300 Sign out	
is updated in an	ſ	Update budget for task(s	6)	×		
ongoing task (in						
status 3), the	Sector States of a	Short description: Budget excluding material and VAT:	Budget 20 000.00 EUR		s Log nce Log	
status of the		Material cost excluding VAT:	EUR		ice coy	
task switches to		Budget calculation file:	Choose from computer Choose File No file chosen			
3-		Tasks:	screenshot1.jpg Drying Demolition			
This means that	Project management: In4mo Espoo	Comment:				
the work can	Project manager: Fanny Serve Case information			Pr	oject plan	
continue, but					or task(s) Refresh	
only the	Related tasks		Send for approv	/al Cancel	Log	
original budget ᠺ	Demolition Fire cleaning	Budget @	56 000.00 EUR	EUR		C
is approved.	Cleaning	Budget Ø	89 000,00 EUR	EUR		

The task cannot be marked as completed in the mobile application until the budget is approved and the status is back in *3*.

The budget can still be edited when the task has reached status *4* or *A* as completed/approved, but instead of the budget being edited – a new budget will appear for the task instead and the old budget will still be visible, but with a white description field.



Starting and managing the reconstruction project

The project management task will move to status 3 when the reporting from the damage site in the repair project starts

a) by the project manager when (s)he reports the first item in the project management task on the mobile application

OR

b) when the assigned person for the first repair task starts the reporting by taking the first picture.

You have the project management task in your mobile where you can report from the damage site if needed. The reported items will be visible in the *Multimedia*, as in any other task.

A * Water inspection	Task information	Multimedia	Milestones	Extras		
3 Project manage	Fanny Service:	1			Move to 'Extras' folder Set site visit picture 25.09.2019 14:38:34	0
A Demolition	Cet					
> 3 Drying	21	4	2			
➡ 2 Fire cleaning		000	3			
➡ B Cleaning	± Save → Ro	tate 90° Ĵ Rot	ate 90'			
Add/remove case tasks						
Log Assign partner Log	A United and	laine die Alle (me			A	
Assign members Log		ltimedia file (ma No file chosen	IX 30 MB)			
	Add					

If the task information for the project manager task needs to be edited, you can do so by clicking on *Edit* in the *Task information* tab.

Water inspection	Task information	Multimedia	Milestones	Extras	
Project manage	Work number:			Project ma	anagement: In4mo Training - Espoo
Demolition	Size:			(58.7 km)	Log Fanny Service Edit Log
B‡ Drying	Task: Start time:	Project manager 24.09.2019	ment	N. N	onninkyla
2 Fire cleaning	End time:				11112
B Cleaning	Estimated partner budget:	EUR		*	Kerkkoo 💕 Ilby 🖇 🖉
Addremove case tasks	Approved partner budget:	EUR			Jacka
Log Assign partner Log	Description:				- X. X. V
Assign members Log	Notes:				Haman + 1
	Edit Dy Farmy Ser	vice on 24.09.2019 15	:27 Log	2	Tolikinen
Create new MEPS file				-te	FA
Measurements				D bing	© 2019 Microsoft Carpord © 2019 Microsoft Carpord

NOTE! The start time of the project manager task is automatically the time when the task was allocated to the assigned partner office.



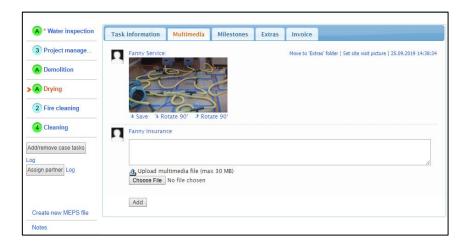
Approve and conclude tasks

By clicking the sub header *Project plan*, you see all the tasks in the case including details about the assigned employees, and the planned start- and end times. Report items can be viewed via the *Multimedia* link next to the *End time* column.

Here you can follow up that all steps are completed and that the work on the damage site is proceeding.

	 There are tasks that need Tasks waiting for budget a 	to be sent for budget approval: Fin approval: Cleaning	e cleaning		
Diect management: Infmo Trai	Porvoontie 125, 0710 Sarah Haines (Sarah H Water inspection : In4mo Training - E Drying: In4mo Training - Espoc Fire cleaning: In4mo Training - Espoc	Haines, 01111) ning - Espoo (Fanny Service) ispoo (Fanny Service) o (Fanny Service) - Espoo (Fanny Service)	Compensation deci Case handler: Fann Case ID: ABC12345	y Insurance Log	
poo pject manager: Fanny Service	-	udget ———— > Invoic	e ———	Project pl	
poo oject manager: Fanny Service Case information	Cost control Bi		-		Refresh
ooo oject manager: Fanny Service Case information Task name	Cost control Bartner	Assignees	Start time	End time	Refresh
ooo oject manager: Fanny Service Case information	Cost control Partner In4mo Training - Espoo		-		
ooo oject manager: Fanny Service Case information Task name	Cost control Bartner	Assignees	Start time	End time	Refresh
ioo ject manager: Fanny Service Case information Task name Water inspection	Cost control Partner In4mo Training - Espoo	Assignees Fanny Service	Start time 16.09.2019	End time 16.09.2019	Refresh Multimedia
ioo jject manager: Fanny Service Case information Task name Water inspection Drying	Cost control Partner In4mo Training - Espoo In4mo Training - Espoo	Assignees Fanny Service Fanny Service	Start time 16.09.2019 24.09.2019	End time 16.09.2019 24.09.2019	Refresh Multimedia Multimedia
ject manager: Fanny Service Case information Task name Water inspection Drying Demolition	Cost control Partner In4mo Training - Espoo In4mo Training - Espoo In4mo Training - Espoo	Assignees Fanny Service Fanny Service Fanny Service	Start time 16.09.2019 24.09.2019 24.09.2019	End time 16.09.2019 24.09.2019 24.09.2019	Refresh Multimedia Multimedia Multimedia

You can always go to a specific task and see information about a specific task. Click *Multimedia* to see the report items regarding the chosen task.





Each task is to be approved (or rejected) by the project manager.

A * Water inspection	Task information	Multimedia	Milestones	Extras	Invoice	
3 Project manage	Approve Reject	0		Clean	ing: In4m	o Training - Espoo (58.7 km) Log
A Demolition	Work number:					iy Service Log
A Drying	Subcontractor work number:					assigned: Log
2 Fire cleaning	Size:				Monnink	ryla
The second s	Task:	Cleanin	g		*	
4 Cleaning	Start time:	24.09.2	2019	-		Kerkkoo 📑 IIIby 🔓 🦉
d/remove case tasks	End time:	24.09.2	2019			
sign partner Log	Estimated partner budget:	89 000	,00 EUR			Jackarby
and the second	Approved partner budget:	89 000	,00 EUR		-	

When all the repair tasks in the project are marked as <u>approved</u> and are in status green *A*, the project manager task's status switches automatically to *4*. The *Approve* button appears in the task information tab, when the task is in status *4*. Also, the *Reject* button appears when the task is in status *4*, so if you consider that the task is not completed, click on the *Reject* button and the task switches back to status *3*.

Once the repair tasks have been approved, the project manager can:

1. Create and assign more tasks to complete the reconstruction project

OR

2. Mark the project management task as complete. When marking the task as approved, the status switches to *A* like in the other repair tasks.

If you wish to add more tasks, click on *Add/remove case tasks*. Otherwise the project is now completed.

NOTE: The project manager needs to	A * Water inspection	Task information	Multimedia	Milestones	Extras	Invoice
check the tasks and	>A Project manage	Reopen task (statu	s 3)			ect management: In4mo Training - Espoo
finally approve them	A Demolition	Email Step A Test				' km) Log gnee: Fanny Service Log
so they go to status	A Drying	Work number: Size:				Monninkylä
A	A Fire cleaning	Task:	Project	management		
•	A Cleaning	Start time: End time:	24.09.3	2019	5	Kerkkoo IIIby
	Add/remove case tasks	End time: Estimated partner budget:	EUR			P Jackarby
	Assign partner Log	Approved partner budget:	EUR			Hamari



Add and send invoice for approval

In order to add invoice to task(s), choose from the sub headers the *Invoice* part and click *Add invoice* to the right.

Case information	Cost control	▼ Invoice	Project plan
	Add invoice		Add invoice
	*Amount: *Invoice number:	250000 EUR (incl.VAT) 19560000	In4mo Traini Espoo
Approved partner budget(incl.VAT	*Add invoice file (max 30MB):	Choose File Water inspecBC12345.doo	x 1 127 160,00
Approved invoices (incl. VAT)	*From:	In4mo Training - Espoo 🔻	
From	Payment date: IBAN: BIC: c Reference number: Comment: ask	(Max 500 characters)	Approved date
A Project manage	Rei	Add	ancel raining - Espoo
A Demolition	Email Step A Test	Assignee: Fanny Servio	ce Log
A Drying	Vork number:	Monninkylä	· · · · · ·

Fill out the needed information and click *Add*. Note that there are few mandatory fields such as *amount, invoice number* and who the invoice is *from* that needs to be specified. Also adding of an *invoice file* is mandatory. Other fields are optional to fill in.

Only those members in your company, who have the permission to see the budget, can see and add invoices for your company offices. Make sure that the *Can see budget* is activated for those members, who need to see budgets and add invoices for cases.

All invoices will be saved both under the *Invoice* sub header and in the *Documents* library. An invoice icon \square will also be visible on the case list.

All invoices will be sent for approval to the case handler, who can either accept or reject the invoice. Once the invoice is approved, it can still be rejected afterwards. Same goes for invoices that

	,	Cost control	Invoice	Proje	ct plan	
					A	dd invoice
					In4m	o Traini
					E	Espoo
Approved partner budget(incl.)	VAT)					1 127 160,0
Approved invoices (incl. VAT)						250 000,0
Approved Meiling for		insted Los				
Approved Waiting for a	Submitted	jected Log	Comment	Amount	Approved date	
	Submitted		Comment			More info
From	Submitted date	Invoice number			date 26.09.2019	More info More info
From In4mo Training - Espoo	Submitted date 26.09.2019 26.09.2019	Invoice number		250 000,00	date 26.09.2019	

have been rejected, they can still be approved afterwards.

It is also possible for insurance company users to attach invoices on the behalf of your company. **You can see invoices regarding your company's tasks only.**