USER GUIDE

PROJECT MANAGER

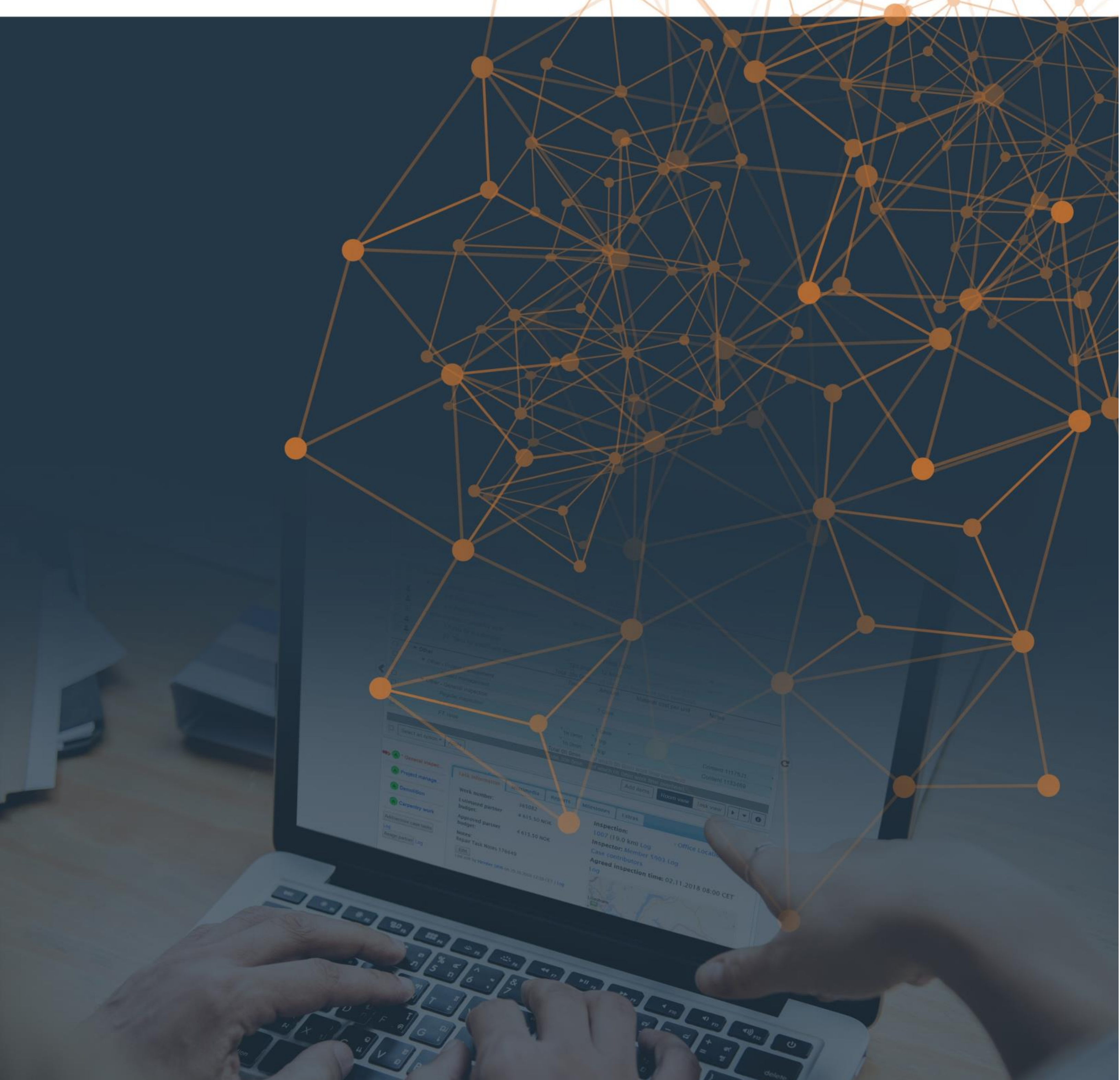


Table of Contents

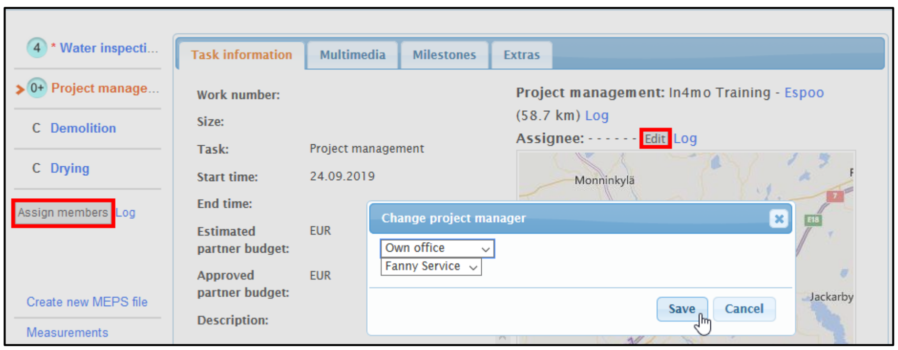
Project manager role

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.

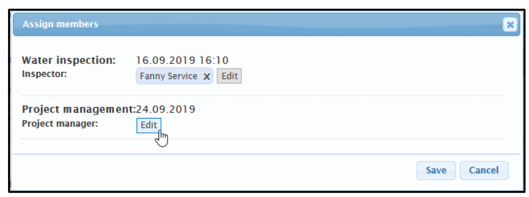
Depending on the insurance company configuration, some steps might already have been done by the insurance company in question.

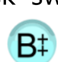
NOTE! In order for your company to be assigned Project management tasks, the task needs to be selected as a provides service in the office information, via Company admin.

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.



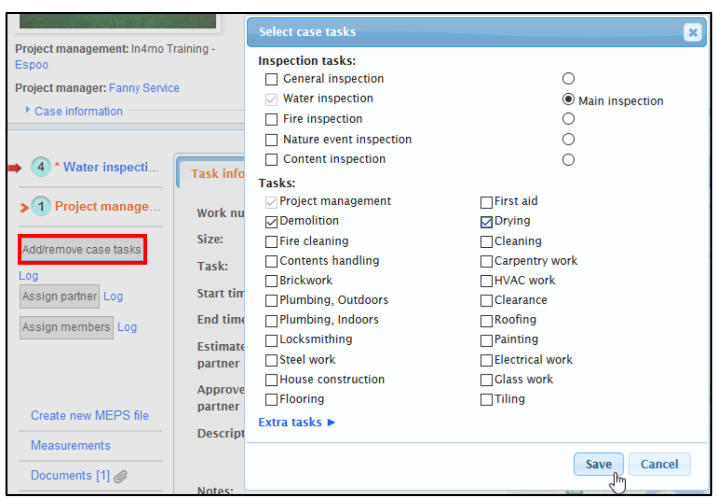
The project manager needs to look over the case in order to determine needed actions. Your main tasks are to set the timetable for the entire case, check that the work is done properly and report the progress of the case if desired.



If a positive compensation decision is made and after the project manager is chosen - the task switches the status automatically to 

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

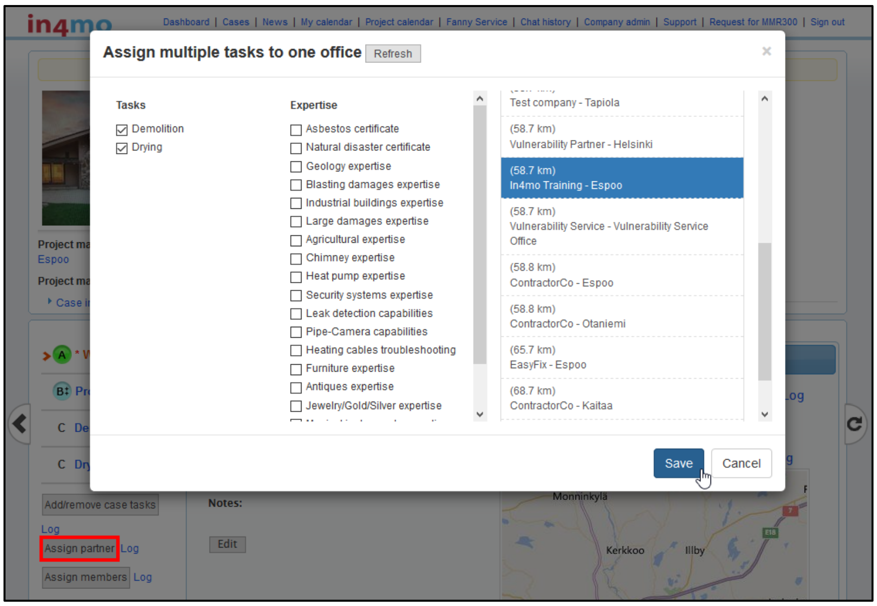


Solera | in4mo

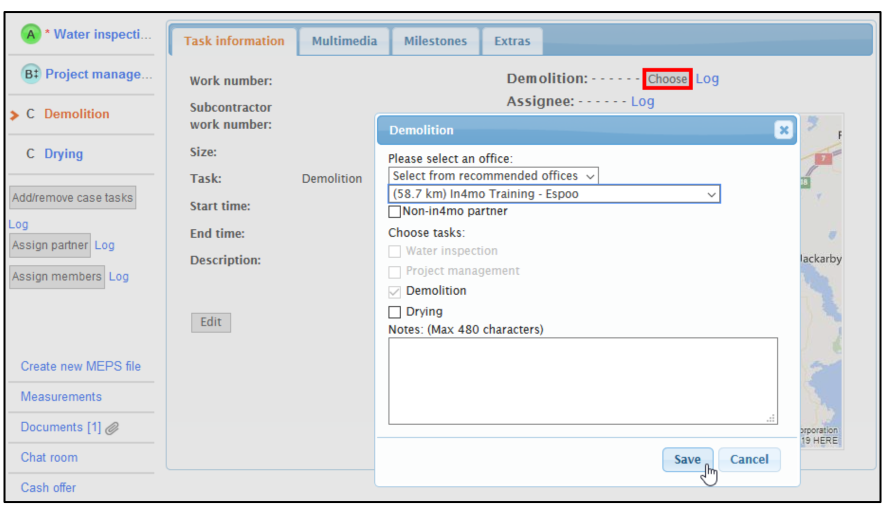
Assign tasks to companies

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*.



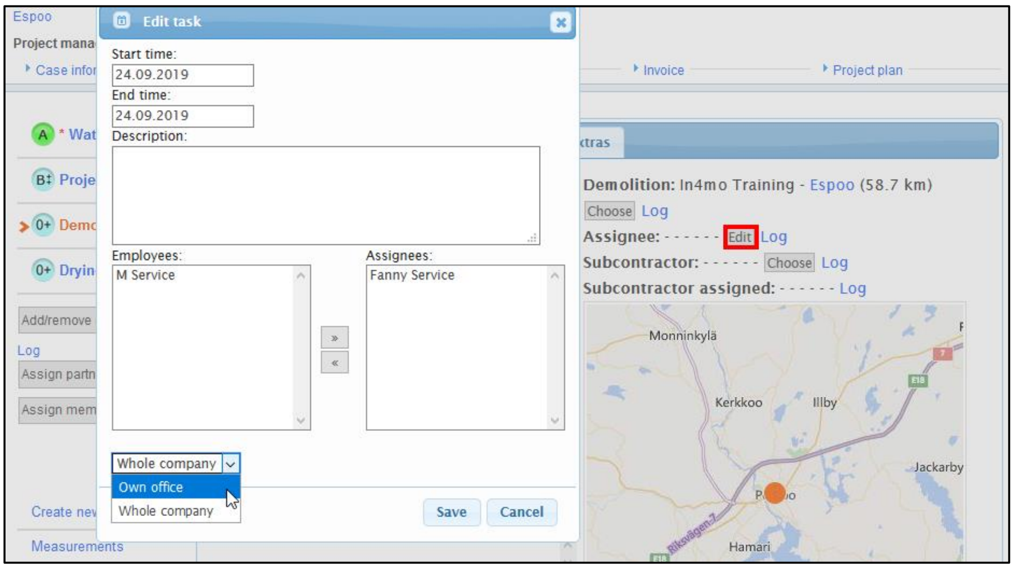
Alternatively, you can assign the task(s) to a partner in the task by clicking *Choose*.



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.



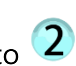
If needed you can fill out information of the task in the *Description* box, but it is not mandatory.

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 

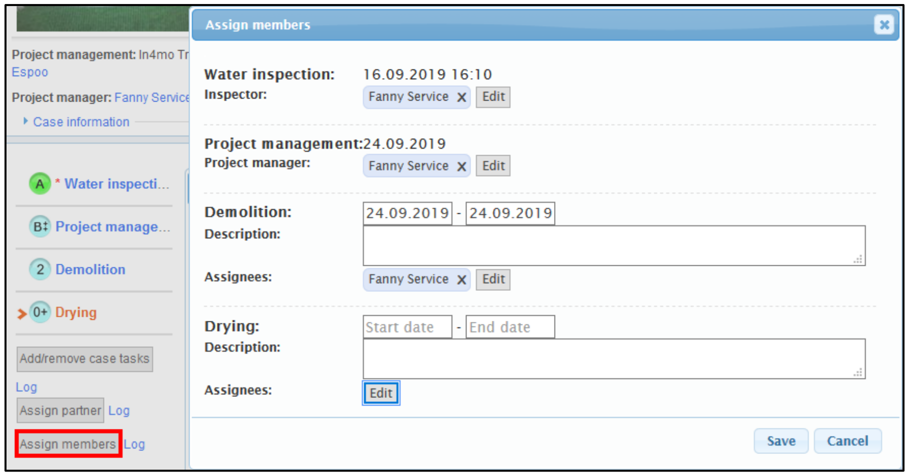
If possible, try to set an estimated start and end date for the task. The dates can be updated at any time from both the web portal and the mobile application.

When start and end dates are set along with a responsible person, the status will switch to 

Multiple task assignment

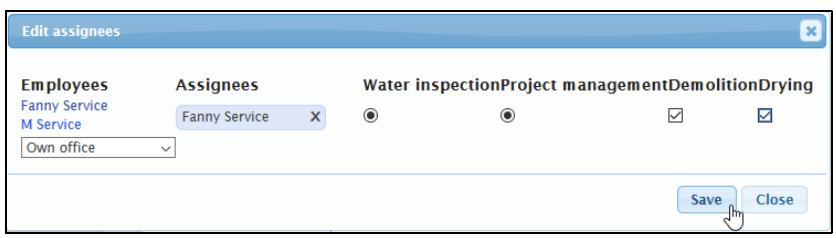
You can also assign multiple tasks to responsibles at the same time and/or set a start- and end date for all the tasks at once.

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.



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.



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 🚫 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.

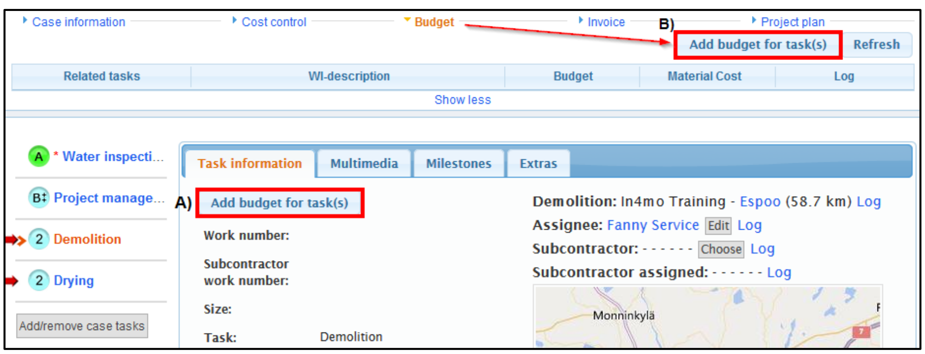
The company that has been assigned for the task is also responsible for adding the budget, meaning you can only add budgets to your own tasks. Budget can only be added when the task is in status 2

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

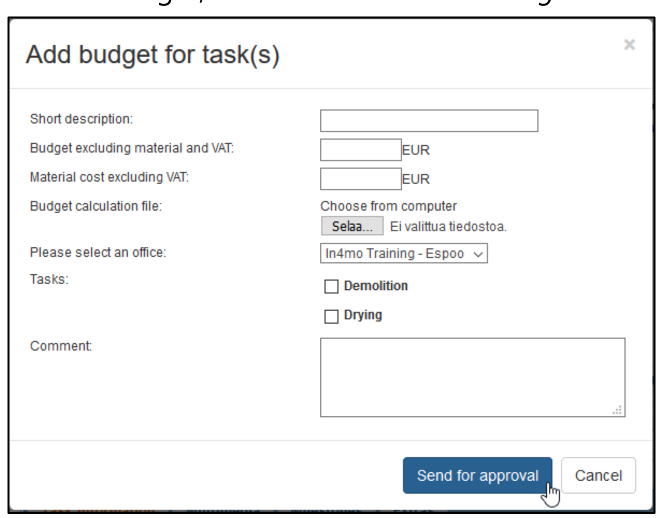
B) Click the *Budget* sub header of the case and click *Add budget for task(s)*.



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 approval, switches to status B



Updating budgets

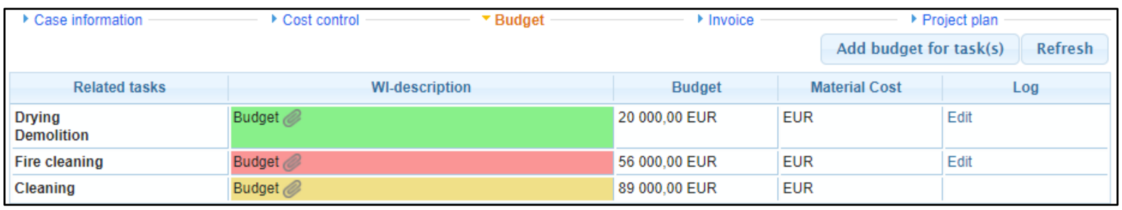
If the budget needs to be edited, go to *Budget* on the sub headers and click *Edit* on the right of the task under *Log*.

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.

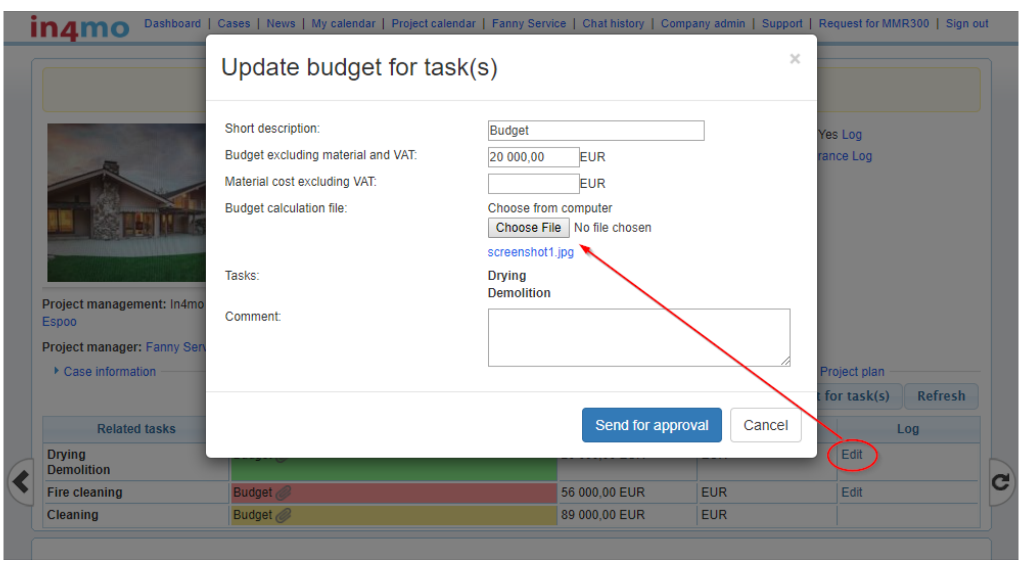
When a budget is rejected, the status of the task goes back to *2*. The description field is then red. Go then back to *Edit* and update the information.



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 is updated in an ongoing task (in status *3*), the status of the task switches to 3-

This means that the work can continue, but only the original budget is approved.



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

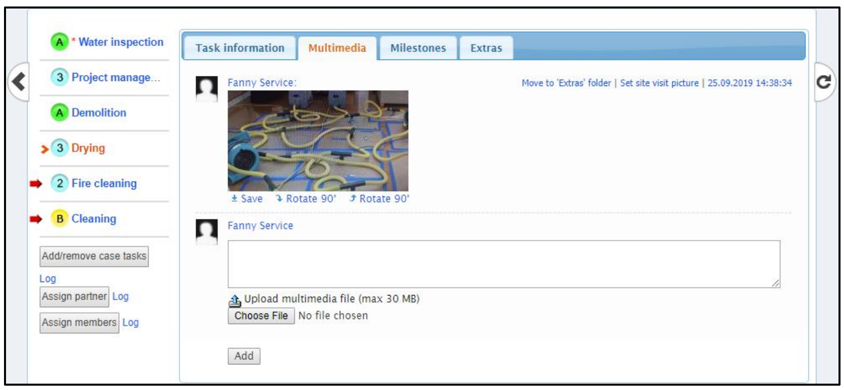
The project management task will move to status *3* when the reporting from the damage site in the repair project starts

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

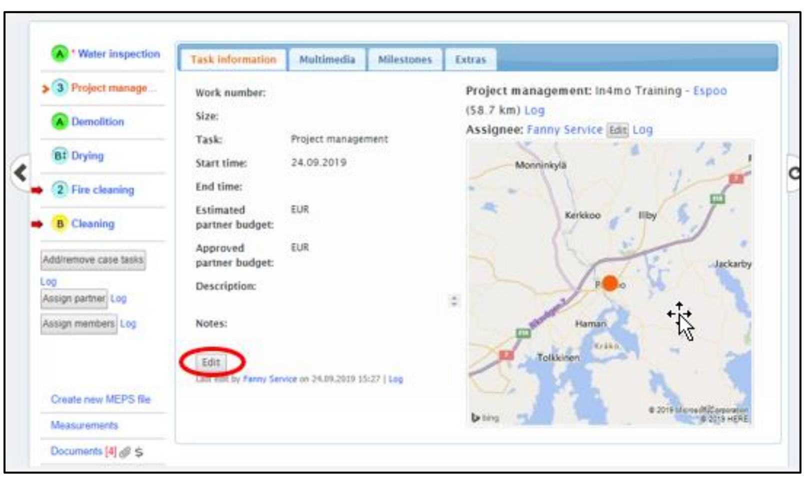
OR

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.



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.



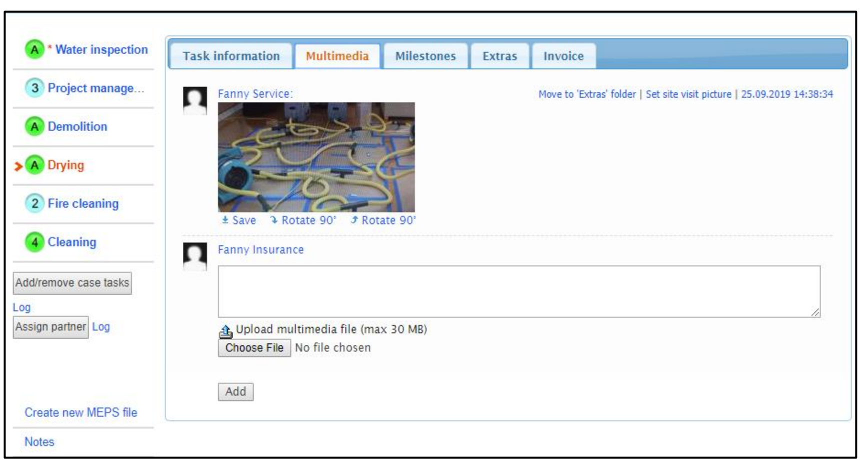
NOTE! The start time of the project manager task is automatically the time when the task was allocated to the assigned partner office.

Approve and conclude tasks

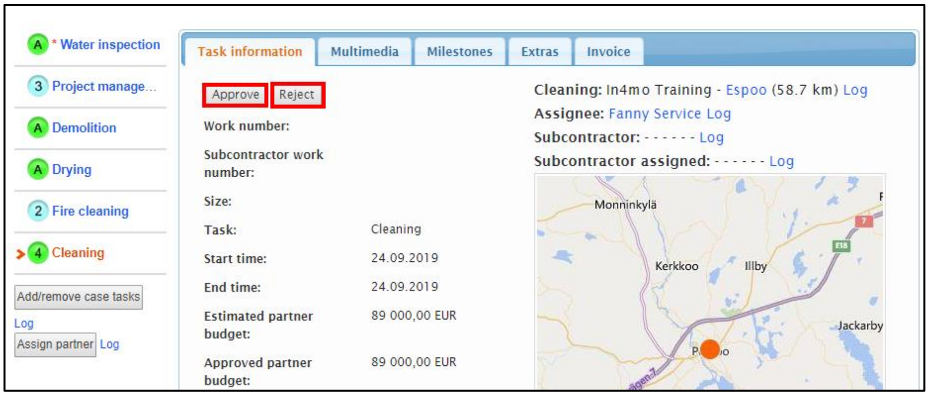
By clicking the sub header *Project plan*, you see all the tasks in the case including details about the assigned employees, and the planned start- and end times. Report items can be viewed via the *Multimedia* link next to the *End time* column.

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

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.



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:

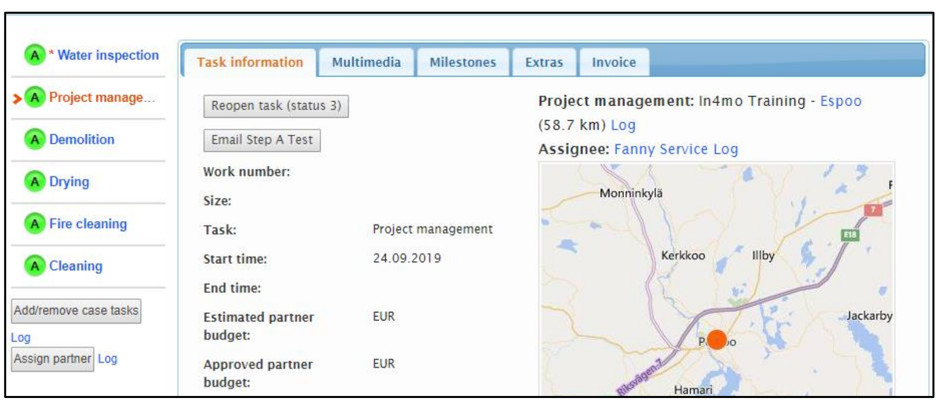
1. Create and assign more tasks to complete the reconstruction project

   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.

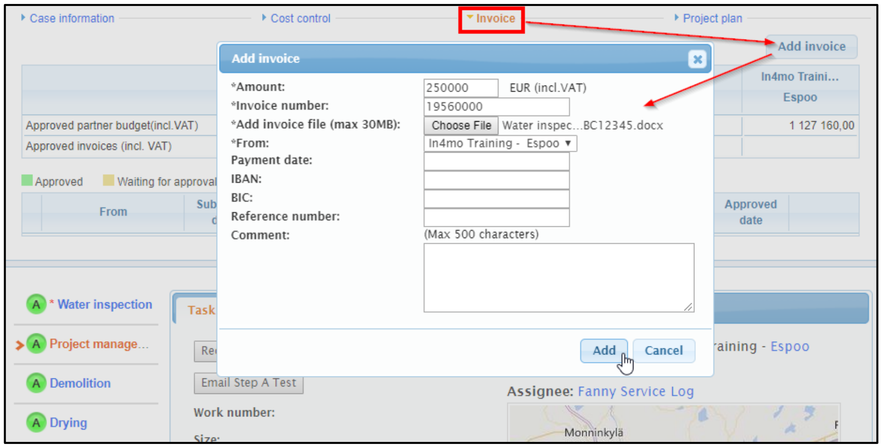
If you wish to add more tasks, click on *Add/remove case tasks*. Otherwise the project is now completed.

NOTE: The project manager needs to check the tasks and finally approve them so they go to status A



Add and send invoice for approval

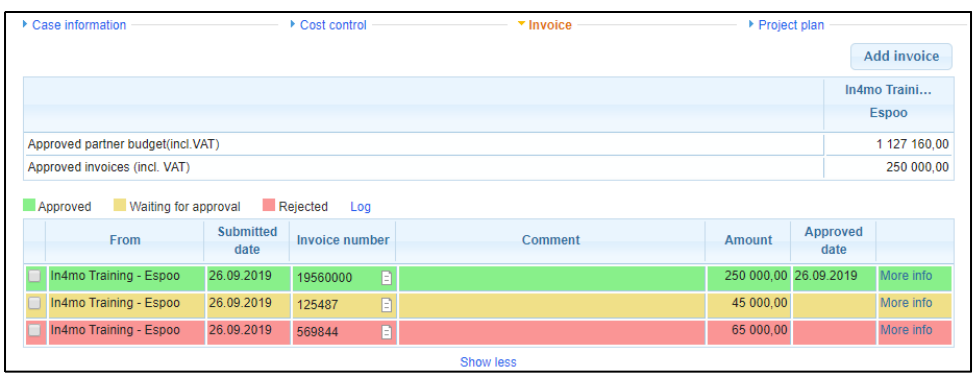
In order to add invoice to task(s), choose from the sub headers the *Invoice* part and click *Add invoice* to the right.



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 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 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.**