SOLERA | in4mo

USER GUIDE
Authorities and Roles in
in4mo

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Overview

There are several roles a user can have in in4mo. This user guide explains what kinds of roles a user can have in in4mo, and what this role means. The roles explained are project managers, external case handlers, inspectors with extra authorities, case handlers and administrators, as well as giving a short description of the different authority levels users can have.

Note that which roles are in use and for what purpose, as well as what kind of permissions are given to the different roles, can vary between different portals, depending on what kind of configurations are set in the portals. This means that if you for example use in4mo for both Insurance Company A and Insurance Company B, and you have a role as project manager in both portals, there might be some differences as to what kind of extra abilities you have in the portals, even though you have the same role.

Authority levels

Every user in in4mo has an authority level, which determines what kind of permissions the user has. There are six authority levels which users can have, from 1-6. The levels 5-6 are used for insurance company users, whereas 1-4 are used for users from the partner network (Contractor portals being an exception). Below you can see what kind of permissions the different authority levels give. Each level listed below (except level 1) has the same permissions as the level before it, in addition to the additional permissions listed for that level, i.e. level 3 has all the permissions mentioned for level 1 and 2, in addition to the permissions mentioned for level 3.

Authority level 1
This is the lowest level a user can have and gives the user access to only see and edit cases in which the user has been assigned a role, in addition to access to the user's own profile and the support pages.

Authority level 2
Gives the user access to see and edit cases assigned to others in the company, i.e. cases in which the user has not been assigned a role.

Authority level 3
Gives access to assign tasks to members, i.e. when the company has received a new task, a user with authority level 3 can set who is responsible for the task.

Authority level 4
This is the administrator level for partner/service companies and is the highest authority level a partner user can have. Gives the user access as an administrator, and thus access to the company admin pages. There is an own user guide for the administrator role which goes more into detail of the administer role.

Authority level 5
Gives a lower-level access to the admin pages. Typically used for case handlers. Only available for members of the insurance company.

Authority level 6
Gives a higher-level access to the admin pages, giving access to parts of the admin pages not available to others. This is the highest level a member of an insurance company can have.

Extra permissions

The list below shows what kind of extra permissions technical advisors, external case handlers, inspectors with extra authorities, inspectors and project managers can have.
The permissions are given per role type, meaning that it is possible to for example give external case handlers the ability to approve budgets, whereas project managers are not.

Create and cancel tasks
Allocate partners to tasks
Make cash offer for any task
Approve budget
Make compensation decision
Attach budget on behalf of partners
View office categories
Approve tasks
Initiate and edit RFQ
Make decision on RFQ
Add new non-in4mo partners to RFQ
Customer communication access
Marked for chat notifications
Make cash offer for WI before budget approval
Start inspection
iRV invitation to Contact person
iRV invitation to Assignee
Can see under review value
Can set under review value

If giving a role the permission to approve budgets, it is further possible to define how big budgets they can approve. For external case handlers and inspectors with extra permissions it is possible to define the approval limit for each specific user, whereas project management follows limits set per case, per partner, or per office. This means that it is possible to define how big budgets a specific partner (all offices) can approve, or how big budgets specific offices can approve. Or partners/offices might use the standard values (per case values) defined in the portal.

User roles

A user can have one or several different roles in the system. In this chapter you will find information about what the different extra roles are, as well as what each role entails.

Case handler

The user set as case handler in a case is the main responsible user for the case. The case handler is an internal user, meaning a user from an insurance company, or in the case of Contractor Pro customers' own cases, their members can also have a role as case handler. The practical role of a case handler in cases can vary from portal to portal, depending on how the individual insurance company wants to utilise the roles, and what kind of extra authorities other roles described in this guide have.

The case handler role is a role which is given to specific members, meaning that it is not necessarily so that all users from an insurance/Contractor Pro company can be set as a case handler.

Case handler:	☑

Technical adviser

An insurance company has the possibility to set a technical adviser in a case, in addition to the case handler. The technical adviser could for example be someone with expertise in the damage type in a case, and thus be able to answer more technical or detailed questions than the case handler would be. The technical adviser can be selected as the recipient of chats.

External case handler

Insurance companies have the possibility to select an external user (user from the partner network) as an external case handler in a case, giving this person more possibilities and responsibilities in the case. The insurance company also chooses which users should be available to select as external case handler. The role of the external case handler in a case, and what kind of extra permissions they have, depends on the settings in the portal.

Inspector with extra authorities

It is possible to give inspectors extra authorities, without giving all inspectors extra authority. The role 'Inspector with extra authorities' is a member-specific setting which the insurance company can give to individual partner users. What kinds of extra authorities inspectors with this role get, depends on the settings in the portal in question. Note also that the role is on a per case basis, meaning that a user with this setting activated won't have any extra authority in a case assigned to a colleague.

Inspector with extra authorities:	☐

When a member with this role activated is assigned to an inspection task in a case it will show in the case information that the member is an inspector with extra authorities.

* **Fire inspection :** Servicepartner - Oslo (Erik Service - Inspector with extra authorities)

Project manager

An insurance company can give partners more responsibilities and possibilities in a case by assigning them project management in a case. Project management is added as a task in a case and assigned to a company, who will then select a responsible for the task. This responsible person will then be the project manager in the case. The role of the project manager in a case, as well as what kind of extra permissions they have, depends on the settings in the portal.

In order to be able to receive project management task this must be among the services an office offers. A user must also be certified as a project manager for it to be possible to select the user as a project manager.

Administrator

An administrator has access to the admin pages for the user's company. It is the administrator's task to add and maintain company information, offices and members, among other things. There are some differences between administrators in insurance companies and other companies.
More details on the administrator role can be found in a separate administrator user guide.