SOLERA | in4mo

USER GUIDE

Statistics Reports
– in4mo Contractor & Service Companies

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Overview

There are many different statistics reports in in4mo, which provide help for follow-up purposes.

Reports are generated based on your settings and are found under **Company admin** -> **Reports**. On this page you will find the different reports under different categories. When you have found a report you wish to download, simply click on the wanted report, then select from what time you want to download the report. Note that this page, and hence all reports found on the page, is only available for Contractor customers.

All reports mentioned in this document will be downloaded as a .csv file. The character encoding is UTF-8. The files can be opened in Microsoft Excel or other software to be analysed.

Reports can be generated at a weekly or a monthly basis, and you can choose which interval works best for you. Some reports can also be generated on a daily basis in addition to monthly or weekly. You can also choose for them not to be generated at all. The availability of some reports might also depend on which functionalities are in use in the portal.

The different reports that are available will be explained in more detail later in this document, here's a list of the available reports:

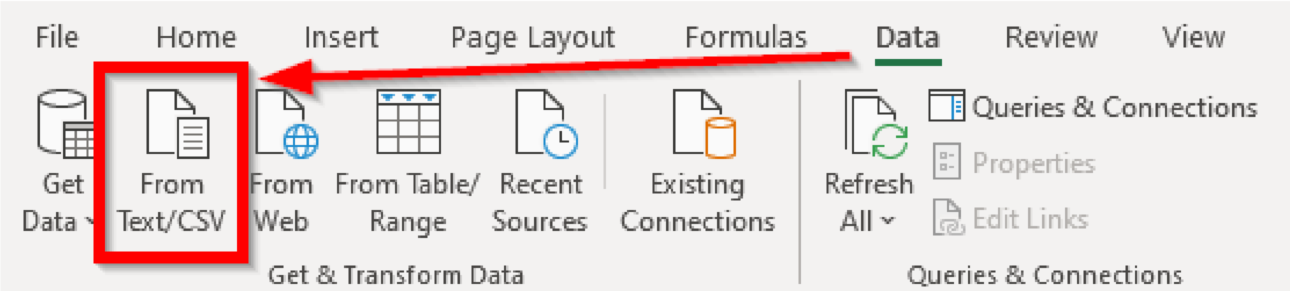
- iCC Task Report (Contractor Pro only)
- WI report (Contractor Pro only)
- Partner statistics (Contractor Pro and Lite only)
- Office availability report (Contractor Pro only)
- Remote Video Services Report (Contractor Pro only)
- Partner list
- Member list

Opening .csv Files in Microsoft Excel

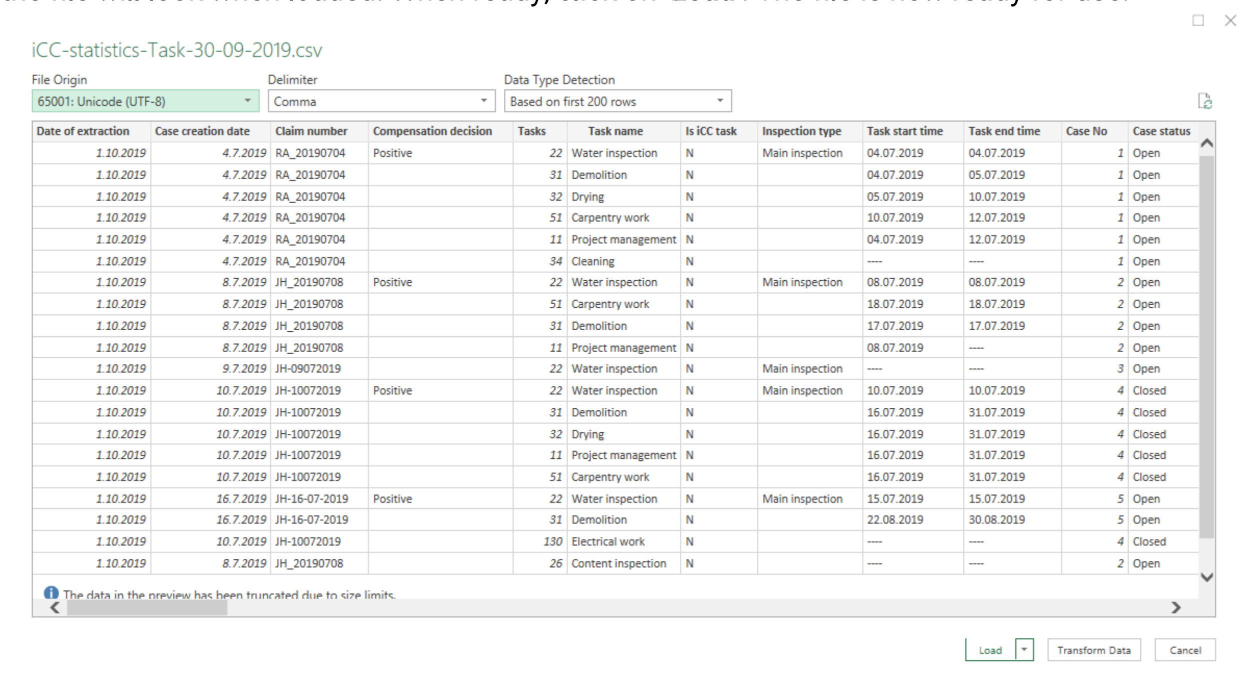
There are two different approaches to opening the .csv files in Microsoft Excel. They can be opened directly in Excel after the download is completed, or they can be saved on your computer, then opened through Excel.

<u>Opening a file saved on computer:</u>

Open Microsoft Excel, then click on ‘**Data**’. You will see a button called ‘**From Text/CSV**’. Click this button, browse to where you have saved the downloaded file, select the correct file, and click ‘**Import**’.



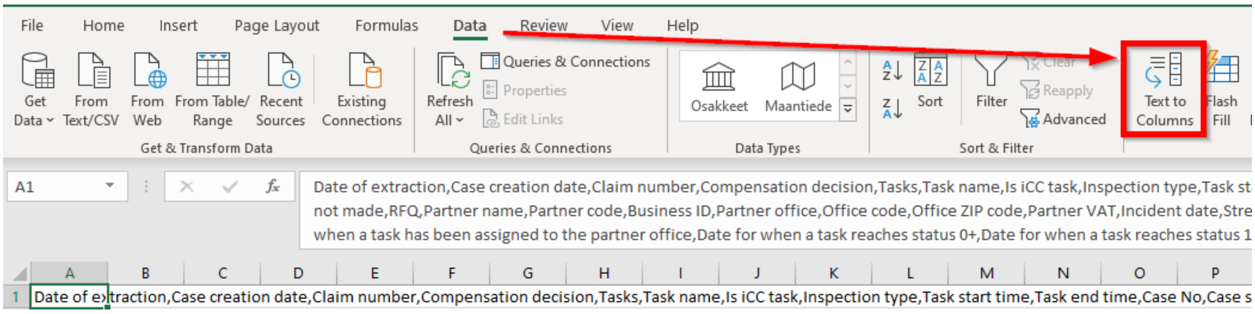
When Excel has loaded the file, a window will pop up where you check that the file origin is in Unicode (UTF-8), and that the delimiter is set as ‘**Comma**’. The table below is a preview of how the file will look when loaded. When ready, click on ‘**Load**’. The file is now ready for use.



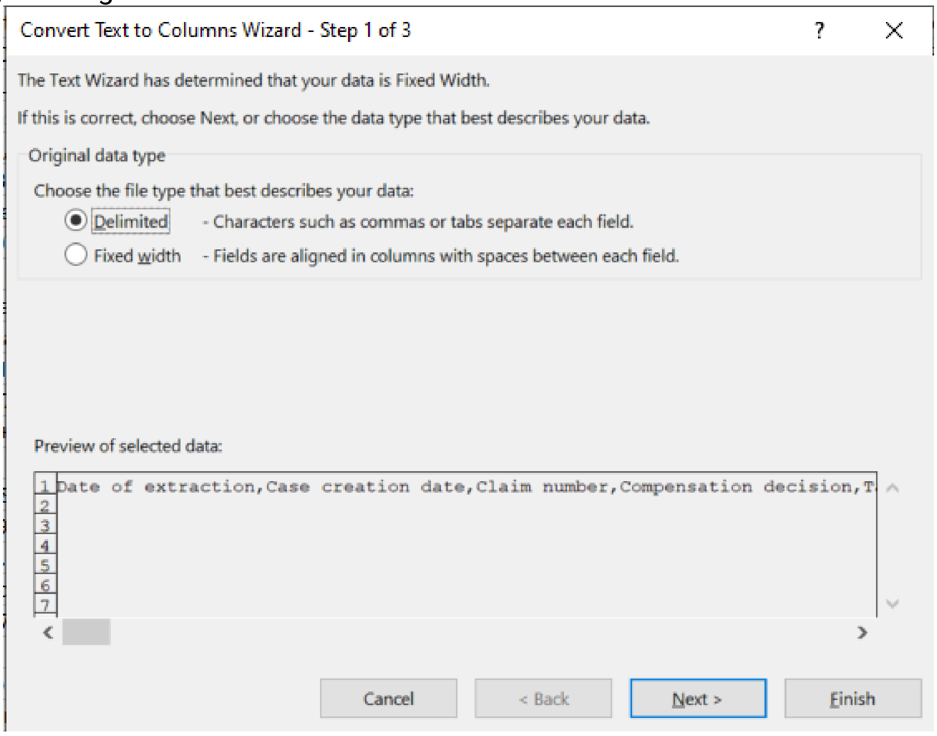
Date of extraction	Case creation date	Claim number	Compensation decision	Tasks	Task name	Is iCC task	Inspection type	Task start time	Task end time	Case No	Case status
1.10.2019	4.7.2019	RA_20190704	Positive	22	Water inspection	N	Main inspection	04.07.2019	04.07.2019	1	Open
1.10.2019	4.7.2019	RA_20190704		31	Demolition	N		04.07.2019	05.07.2019	1	Open
1.10.2019	4.7.2019	RA_20190704		32	Drying	N		05.07.2019	10.07.2019	1	Open
1.10.2019	4.7.2019	RA_20190704		51	Carpentry work	N		10.07.2019	12.07.2019	1	Open
1.10.2019	4.7.2019	RA_20190704		11	Project management	N		04.07.2019	12.07.2019	1	Open
1.10.2019	4.7.2019	RA_20190704		34	Cleaning	N		----	----	1	Open
1.10.2019	8.7.2019	JH_20190708	Positive	22	Water inspection	N	Main inspection	08.07.2019	08.07.2019	2	Open
1.10.2019	8.7.2019	JH_20190708		51	Carpentry work	N		18.07.2019	18.07.2019	2	Open
1.10.2019	8.7.2019	JH_20190708		31	Demolition	N		17.07.2019	17.07.2019	2	Open
1.10.2019	8.7.2019	JH_20190708		11	Project management	N		08.07.2019	----	2	Open
1.10.2019	9.7.2019	JH-09072019		22	Water inspection	N	Main inspection	----	----	3	Open
1.10.2019	10.7.2019	JH-10072019	Positive	22	Water inspection	N	Main inspection	10.07.2019	10.07.2019	4	Closed
1.10.2019	10.7.2019	JH-10072019		31	Demolition	N		16.07.2019	31.07.2019	4	Closed
1.10.2019	10.7.2019	JH-10072019		32	Drying	N		16.07.2019	31.07.2019	4	Closed
1.10.2019	10.7.2019	JH-10072019		11	Project management	N		16.07.2019	31.07.2019	4	Closed
1.10.2019	10.7.2019	JH-10072019		51	Carpentry work	N		16.07.2019	31.07.2019	4	Closed
1.10.2019	16.7.2019	JH-16-07-2019	Positive	22	Water inspection	N	Main inspection	15.07.2019	15.07.2019	5	Open
1.10.2019	16.7.2019	JH-16-07-2019		31	Demolition	N		22.08.2019	30.08.2019	5	Open
1.10.2019	10.7.2019	JH-10072019		130	Electrical work	N		----	----	4	Closed
1.10.2019	8.7.2019	JH_20190708		26	Content inspection	N		----	----	2	Open

Opening directly after completed download:

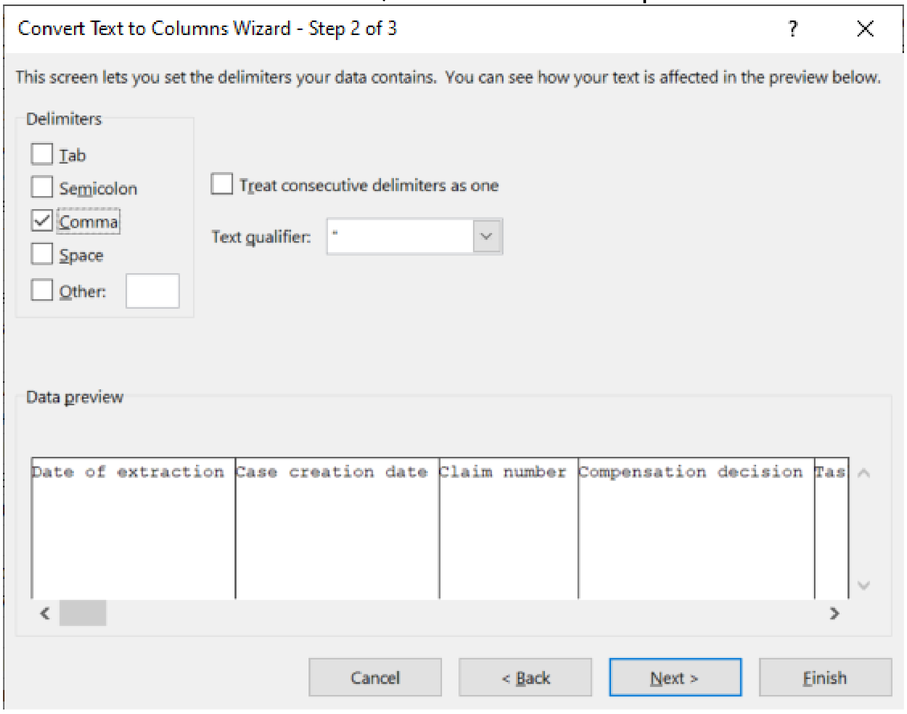
If you have chosen to open the downloaded file directly, you may find that all content is found in column A of the Excel file. To fix this, click '**Data**' from the top menu in Excel, then click '**Text to Columns**'.



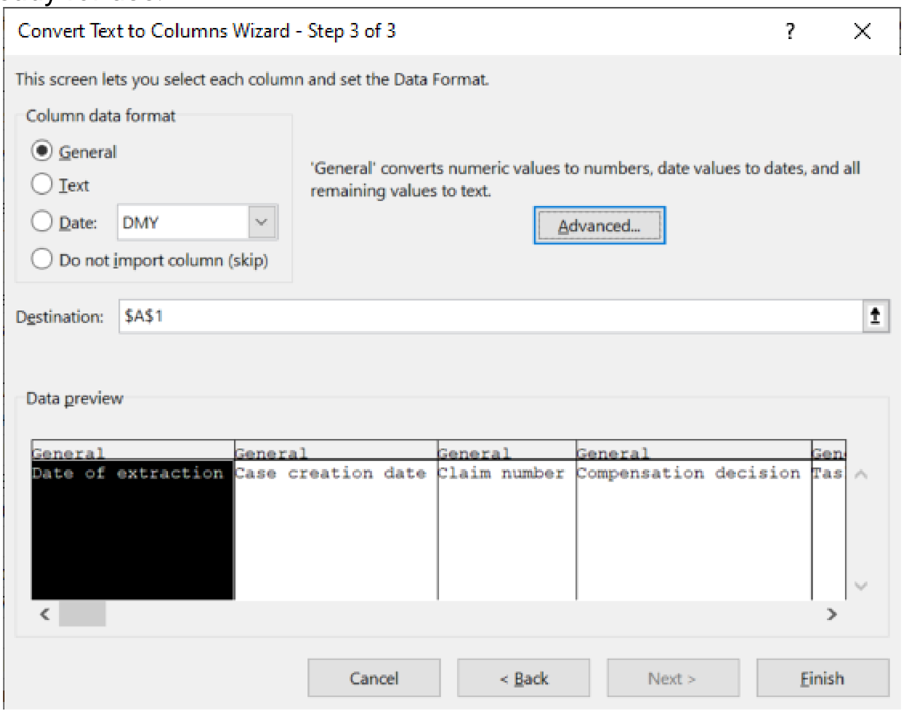
A new window will open. Under '**Original data type**', select the first option (**Delimited**), then proceed by clicking '**Next**'.



In step 2, select ‘**Comma**’ as the delimiter, then click ‘**Next**’ to proceed.

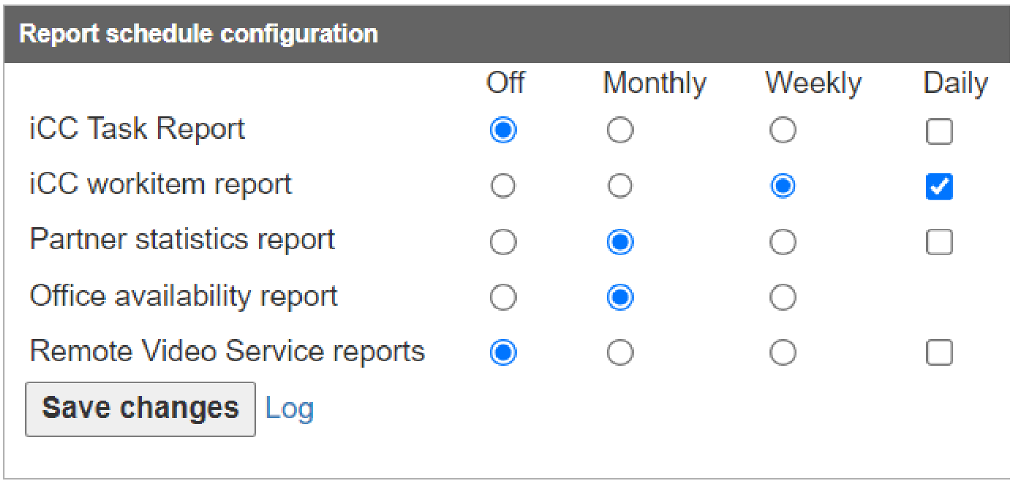


In the third and final step, select ‘**General**’ as the column data format, then click ‘**Finish**’. The file is now ready for use.



Report Schedule Configuration (Contractor only)

The configurations for the reports are found in the same place as where you access the reports: **Company admin** -> **Reports.** Only users with authority level 6 has access to this page. The **Report schedule configurations** are found at the bottom of the page.



Note that the first two reports seen in the screenshot above can only be set up by in4mo, whereas you will only see the other reports. Contact in4mo to set up your wanted interval for these reports. In time it will be made possible for you to select yourself.

For each report you can decide whether the report should be generated on a monthly or a weekly basis, or that it should not be generated at all. Reports generated on a monthly basis are generated at the end of each month and are available for download on the first day of each month. Reports generated on a weekly basis are generated Sunday night each week and are available for download on Monday morning. Note that for the reports for which daily reporting is available, this daily report comes in addition to the monthly/weekly reports.

Whenever you change a setting the changes will come into effect immediately, meaning that if you change the setting for a specific report to be generated on a weekly basis, it will be generated starting from the next Sunday night, and likewise if you change the setting to monthly, the report will be generated at the end of the current month.

Whenever you make changes, remember to click '**Save changes**' at the bottom.

Define Separator for csv Files (Contractor only)

It is possible to define the separator used for .csv files generated in in4mo. Changing the separator will affect all reports, as well as member and partner lists and extracts from dashboard and case list.

Defining the separator is done in **Company admin -> Reports** and will be in use for all files generated after the change.

The default setting for the separator is comma (,), meaning that the functions will not change until a new separator is defined manually.

Available Reports

A list of the available reports was shown in the Overview chapter. Below you will find more information about each report. Note that some of the reports are only available to customers of in4mo Contractor, whereas the partner and member lists are available to all.

iCC Task Report (Contractor Pro only)

The task report contains information about every single task in a case. Each task has its own row with information showing the situation at the moment the report was generated. How long a period is tracked in this report may vary between different portals. The report only includes information from portals in which iCC is activated.

Column	Field Name	Description
A	Date of extraction	The date the report is generated
B	Company	The name of the company whose case it is, either the name of an insurance company or the text 'Own case' if it's an own case
C	Case creation date	The date the case was created
D	Claim number	The identifier defined by your company
E	Compensation decision	Positive or Negative if the compensation decision (insurance cases) or case continuation decision (own cases) is made at the time of report generation, otherwise blank
F	Tasks	Task type ID
G	Task name	The name of the task type
H	Is iCC task	Indicates if the task is currently registered as an iCC task, meaning having a work plan
I	Inspection type	If main inspection task it is indicated, otherwise empty
J	Task start time	The planned start date for the task
K	Task end time	The planned end date for the task
L	Case No	The unique ID of the case created by in4mo
M	Case status	The status at generation of the report: Open, Closed, Aborted or Removed
N	Closing date for case	Date when the case was closed, if closed
O	Status	The status of the task at generation of the report
P	Main inspection reached status 4 but compensation decision is not made	If main inspection is completed but compensation decision is not made, the field will have a value
Q	RFQ	Y if the task is or have been under RFQ otherwise N
R	Partner name	The name of the partner assigned to the task at generation of the report
S	Partner code	The unique code of the partner assigned to the task at generation of the report
T	Business ID	The business ID defined for the partner office assigned to the task at generation of the report
U	Partner office	The name of the partner office assigned to the task at generation of the report
V	Office code	The unique code of the partner office assigned to the task at generation of the report

W	Office ZIP code	The zip code of the partner office assigned to the task at generation of the report
X	Partner VAT	The VAT number defined for the partner office assigned to the task at generation of the report
Y	Incident date	The registered date of the incident
Z	Street address	The street and number of the registered damage address
AA	ZIP code	The zip code of the registered damage address
AB	City	The city of the registered damage address
AC	Case creator	Name and email address of the user that is registered as case creator
AD	Case handler	Name and email address of the user that is registered as case handler at generation of the report
AE	Date/time for when a task has been assigned to the partner office	Time stamp for the current assignment of the task at generation of report
AF	Date for when a task reaches status 0+	Time stamp for when the task has been viewed by the current assignment of the task at generation of report
AG	Date for when a task reaches status 1	Time stamp for the current assignment of the task at generation of report
AH	Date for when a task reaches status B	Time stamp showing when the task reached status B
AI	Date for when a task reaches status B++	Time stamp showing when the task reached status B++
AJ	Date for when a task reaches status 3 for the first time	Time stamp showing when the task reached status 3 for the first time
AK	Date for when a task reaches status 4 for the first time	Time stamp showing when the task reached status 4 for the first time
AL	Task rejected	Yes/no depending on whether the task have been removed or not
AM	Date for last reported task	The date for when the task was last time included in a csv report
AN	Office distance	The distance between the assigned office and the damage site
AO	Date for when a task reaches status A for the first time	Time stamp showing when the task reached status A for the first time
AP	Date for when a report was first uploaded for task	Time stamp showing when the report for the task was uploaded for the first time
AQ	Report filled on web	Shows whether the report was filled out from the web portal or not. Shows Y if filled out from the web portal, otherwise it shows N
AR	Task id	The unique ID of the task, created by in4mo
AS	Case id	The unique ID of the case, created by in4mo
AT	Extra task	Shows whether the task is an extra task or not. Shows Y if the task is an extra task, otherwise it shows N

AU	Estimated Time in minutes	Shows the estimated time for completing the task. The time estimate shown is the total estimated for all work items added for the task, as seen under Workplan.
AV	Assigned to subcontractor	Y or N depending on the activation of Subcontractor Extra for the specific task

Work Item Report (Contractor Pro only)

The work item report lists all work items which have been added or edited in in4mo Cost Calculation (iCC) during the last ten months, and includes information about amounts, costs and materials.

The columns in the report are:

Column	Field Name	Description
A	Insurance company	Name of the insurance company, or 'Own case' if not an insurance case
B	Date of extraction	The date the report is generated
C	Case creation date	The date the case was created
D	Claim number	The identifier defined by insurance company
E	WI Amount	The amount of the work item
F	WI Unit	The work item unit, e.g. m, m2, EUR, Hours
G	Task name	The name of the task under which the work item is located, cell is blank if the work item is not tied to a task
H	Room	The name of the room. Shows 'System' for travel and admin costs
I	Structure	The name of the structure. Shows 'System' for travel and admin costs
J	WI ID	Shows the ID of the specific work item, cell is blank for travel and admin costs. There can be several items in a workplan with the same WI ID.
K	WI Name	The name of the work item
L	Closing date for case	Shows the date that the case was closed. If the case has not been closed yet, it will show ----
M	RFQ	Shows whether the task was assigned through RFQ. Shows Y if assigned through RFQ, otherwise N
N	Partner name	The name of the partner assigned to the task, blank if the task has not been assigned
O	Partner code	The unique code of the partner
P	Partner office	The name of the assigned office
Q	Office code	The unique code of the partner office
R	Partner VAT	The VAT number defined for the partner office assigned to the task at generation of the report
S	Business ID	The business ID defined for the partner office
T	Incident date	Shows the incident date for the case
U	Damage address	Shows the address of the damage site
V	Case creator	Name and address of the user who created the case
W	Case handler	Name and address of the case handler

X	Case No	The unique ID of the case created by in4mo
Y	Approved budget (no materials)	Shows the sum of the approved budget without material costs
Z	Superseded	Shows whether the work item has been superseded by a new item. Shows Y if it has been superseded, otherwise N
AA	Approved budget Material(own)	Shows the sum of the approved material costs
AB	Status white, budget excl. materials, not sent for approval	Shows the WI budget without materials that's in a draft state, i.e. work items displayed in white under Cost Control
AC	Status white, partners own materials, not sent for approval	Shows the WI material budget that's in a draft state, i.e. work items displayed in white under Cost Control
AD	Status yellow, budget excl. materials, not approved	Shows the WI budget without materials that's been sent for approval, i.e. work items displayed in yellow under Cost Control
AE	Status yellow, partners own material, not approve	Shows the WI material budget that's been sent for approval, i.e. work items displayed in yellow under Cost Control
AF	Status red, budget excl. material, rejected	Shows the WI budget without materials that's been rejected, i.e. work items displayed in red under Cost Control
AG	Status red, partners own material, rejected	Shows the WI material budget that's been rejected, i.e. work items displayed in red under Cost Control
AH	Date for last reported work-item	The date of generation of the last WI csv the specific WI was included in
AI	Username for user who added WI	The username of the user who added the work item
AJ	Email for user who added WI	The email address of the user who added the work item
AK	Username for user who last updated WI	The username of the user who last edited the work item
AL	Email for user who last updated WI	The email address of the user who last edited the work item
AM	Material name	Shows the name of the selected material. If no material has been selected, this cell will be blank
AN	Material id	The ID of a specific material
AO	Material type	Shows the type of the material added, e.g. standard material, partner price, supplier price, custom material etc.
AP	Supplier name	Shows the name of the material supplier, if the selected material is from an integrated material supplier
AQ	Work item notes	Shows the note added in the notes field for the work item, if a note has been added
AR	Task id	The unique ID of the task, created by in4mo. Shows '0' for work items not directly tied to a task, such as admin and travel costs
AS	Case id	The unique ID of the case, created by in4mo
AT	Planitem id	The unique ID of the work item. There can only be one WI with this ID.

AU	Extra task	Shows whether the task is an extra task, in which case it will be marked with a 'Y', otherwise marked with an 'N'
AV	WI last update	Shows the date and time when the work item was last updated
AW	Work number	Shows the work number the assigned partner has defined for the task, if any, otherwise this cell will be blank
AX	Deleted	Shows whether the work item has been deleted, in which case it will be marked with a 'Y', otherwise marked with an 'N'
AY	Case status	The status at generation of the report: Open, Closed, Aborted or Removed.
AZ	Previous PlanitemID	This field will be populated if an approved work item has been updated and refers to the item that was updated, e.g. the last grey item in the cost control page
BA	WI is moved to customer	Shows if the work item has been allocated to the customer, in which case it will be marked with a 'Y', otherwise it will be marked with a 'N'
BB	WI is moved to Customer's craftsman	Shows if the work item has been allocated to the customer's craftsman, in which case it will be marked with 'Y', otherwise it will show 'N'

Partner Statistics Report (Contractor Lite and Pro only)

The partner statistics report provides a detailed overview of your company's work, as well as other useful information about the tasks during the period.

The report contains a row for each specific action for a task done by an office during the period. A task will remain in the report even if the task is cancelled, the status for the task is revoked or the whole case has been aborted. This means that the same action could be displayed on more than one row, although with different timestamps.
The report contains information about which office has done what action (name and code), as well as in which case, in which task, and for which insurance company. If the task is an extra task, this will be marked with a 1 under the 'Extra tasks' column.

Some columns are displayed in minutes, whereas others are marked with a 1.

Fields in the report:

Column	Field Name	Description
A	Time stamp	Time stamp for case action
B	Insurance company	The name of the company whose case it is; either name of an insurance company, or 'local' for own cases
C	Partner code	The unique ID for the partner
D	Business ID	The business ID defined for the partner
E	Town	The town in which the office is located
F	Zip code	The ZIP code for the office
G	Partner	The name of the partner
H	Office code	The unique code of the partner office

I	Office	The name of the office
J	Responsible	The name of the person responsible for the task
K	Case No	Unique ID of the case in in4mo
L	Case ID	The identifier defined by insurance company
M	Task	Shows which task the information on the row is referring to
N	Extra tasks	Shows whether the task is an extra task or not. Marked with 1 if the task is an extra task, blank if not
O	Status C - 0	Shows how many minutes it took from the task was created until it has been assigned to an office
P	Status 0 - 0+	Shows how many minutes it took from the task was assigned to an office until the it was opened
Q	Status 0+ - 1	Shows how many minutes it took from the task was opened until it was assigned to a responsible
R	Status 1 - 2	Shows how many minutes it took from the task was assigned to a responsible until a start and end time was added for the task
S	Status 0 - 2	Shows how many minutes it took from task assignment until a start time for the task has been set
T	Status 3 - 4	Shows how many minutes it took from when work on the task was started (status 3) until it was marked as completed
U	Delay in start	Shows how many minutes delayed the task was marked as started, compared to the defined start time
V	Status 4-Uploaded report	Shows how many minutes it took from the task was marked as ready (status 4) until the report was uploaded
W	Task started	Shows 1 if the task has been marked as started (status 3)
X	Task finished	Shows 1 if the task has been marked as started (status 4)
Y	Task approved	Shows 1 if the task has been marked as approved (status A)
Z	Date for when a task reaches status B	Timestamp for when the task first reached status B

Office Availability Report (Contractor Pro only)

The partner availability report shows all changes made in the availability of offices during the period. Each change in availability for an office generates a row in the report, which contains columns showing timestamps, information about the partner and the office, as well as showing what was the availability before the change, and what change was made.

Fields in the report:

Column	Field Name	Description
A	Time stamp	Time stamp for when the change in office availability was made

B	Insurance company	Shows the name of the insurance company for whom the availability was changed, or 'Own cases' if the change applies to own cases. Could also show 'All companies' if the change applies to all connected companies.
C	Partner name	The name of the partner the office is part of
D	Partner ID	The unique ID for the partner
E	Office name	The name of the office whose availability status has been changed
F	Office ID	The unique ID for the partner office
G	Office address	The address where the office is located
H	Office ZIP	The zip code of the partner office
I	Office City	The city or postal area in which the office is located
J	Old availability status	Shows what the availability status for the office was prior to the change
K	New availability status	Shows what the availability status for the office is after the change was made

Remote Video Service Report (Contractor Pro only)

The iRV report includes all Remote Video events that have happened during the period since the last generation of the report. If the report is generated on a monthly basis, it will include all events that have happened during that month.

Every activity will be listed in a new row and with the following columns:

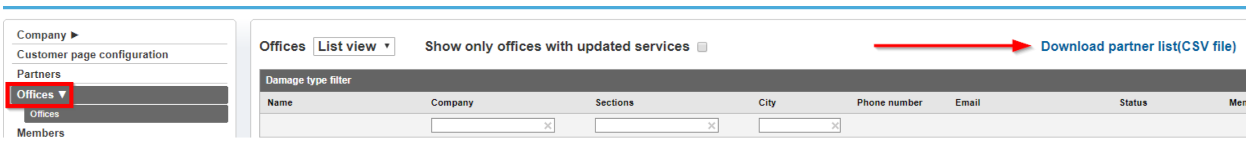
Column	Field Name	Description
A	Date of extraction	The date the report was generated
B	Company	The company the call was made for
C	Case ID	The identifier defined by insurance company
D	Claim number	The unique ID of the case, created by in4mo
E	Invite ID	The unique ID of the remote video invitation, created by in4mo
F	Task name	The name of the task associated with the invite. Empty if no task defined.
G	Task ID	The unique ID of the task, created by in4mo. Empty if no task defined.
H	Invitation creator	The name of the user who have sent the invitation
I	Invitation creator Email	The email address of the user who have sent the invitation
J	Invitation creator Company	The company of the user who have sent the invitation
K	Invitee name	The name of the contact the invitation was sent to
L	Invitee contact type	Contact person or Assignee depending on the method used for sending the invite.
M	Invitee phone number	The phone number of the contact the invitation was sent to
N	Invitee email address	The email address of the contact the invitation was sent to

O	Invitation sent via	The method selected for sending the invite, e.g. Email or SMS
P	Event time stamp	The time stamp when the activity was registered in the format, YYYY.MM.DD HH:MM
Q	Event type	The event that has triggered registration in the report, e.g: **Sent remote video invitation** = The invitation was sent **Remote video legal agreement accepted** = The invited have accepted the terms **Remote video connection created** = One of the parties have connected **Remote video call started** = Both parties have connected, and the call have started **Remote video screenshot taken** = A picture have been captured during the call **Remote video clip taken** = A video have been captured during the call **Remote video call ended** = One of the parties have left the call so it is ended **Cancelled remote video invitation** = The invitation has been cancelled/closed so it isn't active anymore
R	Video recording duration	The lengths of the video clip captured in the format, HH:MM:SS. Is only shown in the rows with event type **Remote video call started**
S	Call duration	The lengths of the call in the format, HH:MM:SS. Is only shown in the rows with event type **Remote video call ended**

Partner list

The partner list shows information about each office in the portal, including contact information and information about how many members are found in each office, as well as how many members have the different types of certification.

The partner list is available to users with authority level 6 (Contractor) or level 4 (Building Claims) and is found under '**Offices**'. Click on '**Download partner list (CSV file)**' to download the file.



Fields in the report:

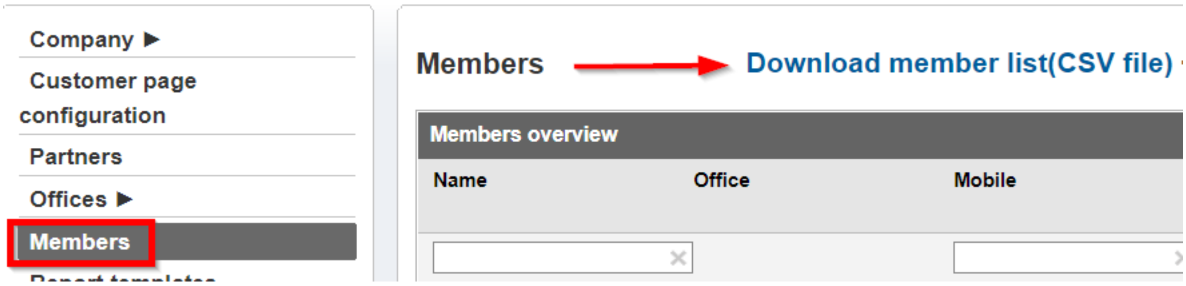
Column	Field Name	Description
A	Section	Name of the section that the office is part of, if any. If sections are not in use, it will show the name of the company. Note: Sections are a feature exclusive to Contractor customers.

B	Office ID	The unique code of the partner office
C	Office	The name of the partner office
D	Business ID	The business ID defined for the partner office
E	Office Street	Street address where the office is located
F	Office ZIP	ZIP code where the office is located
G	Office City	City where the office is located
H	Office email	The office’s email address
I	Contact person	Name of the contact person of the office
J	Contact person phone	Phone number of the contact person of the office
K	Contact person email	Email address of the contact person of the office
L	Number of Members	Number of members in the office
M	Insp Cert	Number of members from the office who are certified for inspection tasks
N	PM Cert	Number of members from the office who are certified for project management tasks
O	Craftsmen Cert	Number of members from the office who are certified for craftsmen tasks

Member list

The member list gives information about all users in the portal, both active and deactivated members. The list shows the name and contact information about each member, as well as information about their current availability status, their deputy, which office and section they belong to, their authority level, whether they have permission to see budgets, and what kind of certificates they have.

The member list is available to users with authority level 6 (Contractor) or level 4 (Building Claims) and is found under ‘**Members**’. Click on ‘**Download member list (CSV file)**’ to download the file.



Column	Field Name	Description
A	First Name	User’s first name
B	Last Name	User’s last name
C	Email	User’s email address
D	Phone Number	User’s phone number
E	Status	User’s availability status
F	Authority Level	User’s authority level
G	Company Name	Name of the company in which the user is located
H	Section name	Name of the section in which the user’s office is located. If sections are not in use, it shows the company’s name
I	Office Name	Name of the office in which the user is located

J	Deputy	Name of the user’s deputy
K	Can see budget	Shows whether the user has been given permission to see budgets. Displayed as ‘Yes’ or ‘No’.
L	Inspector Certification	Shows whether the user has inspector certification
M	PM Certification	Shows whether the user has project management certification
N	Craftsman Certification	Shows whether the user has craftsman certification