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Overview

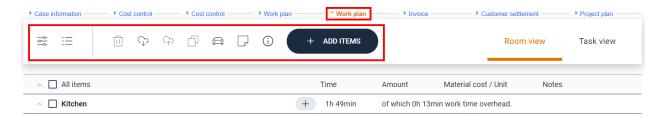
This document serves as a guide to the work plan feature, which is part of in4mo Cost Calculation (iCC). In this document you will see how the work plan works; how to set up a work plan, as well as what other possibilities you find in the plan. Finally, there is a short explanation of how work items are sent for approval (i.e. how a budget is sent for approval).



An Overview of the Workplan

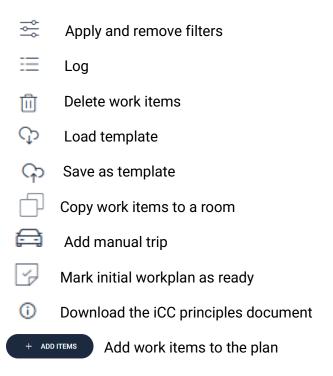
To open the work plan, click on the "Work plan" tab in the work bar. This opens the work plan, where you will see the work plan for your case, as it is at the time you open it. Depending on your authority and role in the case, you may have access to the work plan for the entire case, or just for task(s) assigned to your own company/office.

On top of the work plan you find the top bar, where you find different buttons. The top bar is locked so that it is always available regardless of how big the plan is, no scrolling up and down is needed.



Note that there are currently two 'Work plan' tabs in the portals. The reason for this is that there are two versions of the work plan, the older one (to the left), and the new one (to the right). The old work plan will be removed from the portals during autumn 2021.

The icons are greyed out when they cannot be used, and a help text is available when mouse over.



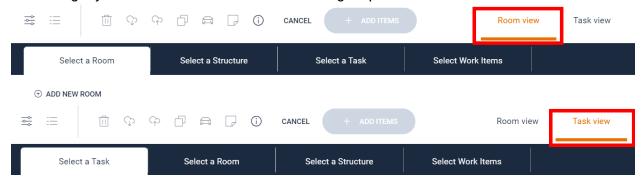


Creating a work plan from the web portal

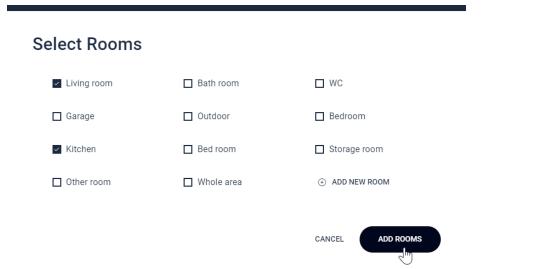
There are different ways in which you can create and update work plans. The different ways to do this are described below.

Add items from full list

When starting a new workplan or adding new tasks or rooms the way to add items is by clicking the + ADD ITEMS button. Depending on if the Room view or the Task view is selected the view will be slightly different due to the order the coming steps will be done.



When selecting room for the first time the affected rooms must be added. This is for limiting the options to the needed ones for the future. It is always possible to add more rooms later.

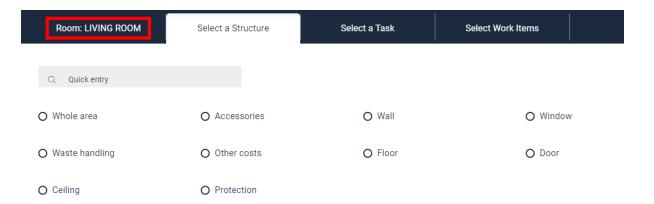


The added rooms will then be visible and can be selected directly under the Select a Room tab.



When one selection is done it is shown in the tab header and the next tab is opened.





When room, structure and task is selected the wanted work items can be selected.

Room: LIVING ROOM Str	ructure: FLOOR Task: DEMOLITION	Work Items: 2
Remove skirting board	Remove and salvage skirting board for reuse	☐ Remove quadrant / cover strips
☐ Remove transition strip	Remove direct stick timber floor	☐ Remove ply substrate fixed to concrete
Remove floating floor excluding underla	ay Remove floating floor underlay	$\hfill\Box$ Remove solid timber floor on battens or joists
Removed recessed edge plaster board	Remove floorboard up to 70-145mm on joists or battens	Remove loose laid carpet / carpet tiles / vinyl
☐ Remove flooring vinyl tiles/carpet tiles	☐ Remove direct stick carpet / carpet tiles	Remove acoustic insulation material
☐ Sand adhesive residues on timber subf	floor Remove particle board or ply floor substrate fixed to battens or joists	Remove chipboard flooring incl. covering and fastenings
Remove joists heavy - e.g. large LGS HV above 175x50mm	WD Remove joists light - e.g. hyne / LVL / HWD up to 100x50mm	Remove insulation in joists, from above
☐ Remove floor tiles	Grind concrete floor	☐ Remove screed 0-30mm
☐ Remove screed 30-70mm	☐ Remove screed 70-110mm	Remove floor battens c/c 600mm
☐ Remove floor battens c/c 300mm	Remove vapour barrier 0.02mm	
		CANCEL ADD TO PLAN



If there are related items available for the ones selected, they will be shown and can be selected right after the original items where added.

Room: LIVING ROOM	Structure: FLOOR	Task: DEMOLITION	Select Work Items		
Recommended items. Do you also want to add these items into the plan?					
∧ Living room					
∧ ✓ Floor - Carpentry work					
New direct stick timber floor excluding parquetry					
			CANCEL	ADD TO PLAN	

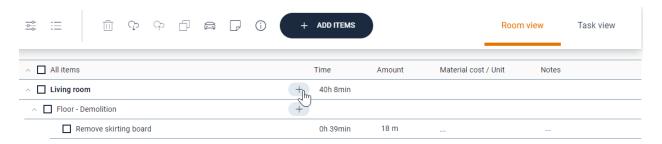
If you want to leave the selection view you can at any time, click Cancel to get back to the work plan.

	CANCEL + ADD ITEMS	Room view Task view			
Room: LIVING ROOM Structure:	WALL Task: PAINTING	Select Work Items			
PREPARATORY WORK					
☐ Wash for paint	Filling of joints on new plaster and chipboard walls	Complete filling of board, masonry and concrete walls x2			
☐ Complete filling 1 coat	☐ Pointing w/tape (separate work)	Pointing without tape (separate work)			
PAINTING					
\square Spot filling and paint skirting board smooth 1 coat	$\hfill \square$ Spot filling and paint skirting board smooth additional coat	Spot filling and paint profiled skirting board 1 coat			
$\hfill \square$ Spot filling and paint profiled skirting board additional coat	□ Spot filling and paint quad / corner mouldings 2 coats	$\hfill \square$ Sand and paint baseboard 2 coats (incl. all materials)			
Spot filling and paint cornices smooth 1 coat	☐ Paint cornices smooth additional coat	\square Spot filling and paint profiled cornices 1 coat			
Paint profiled cornices additional coat	☐ Sand and paint cornices 2 coats (incl. all materials)				
WALLPAPER AND PAINTABLE PRODUCTS					
Remove wallpaper/burlap	☐ Laying hessian/cloth	Painting 1 coat on smooth surfaces			
☐ Laying wallpaper	☐ Painting 2 coats on smooth surfaces	☐ Laying new textile wallpaper			
Spray painting x1	☐ Spray painting x2	☐ Varnishing/staining of panel Additional coat			
□ Oiling of papal	☐ Varniching/staining panel 1 cost	CANCEL ADD TO PLAN			

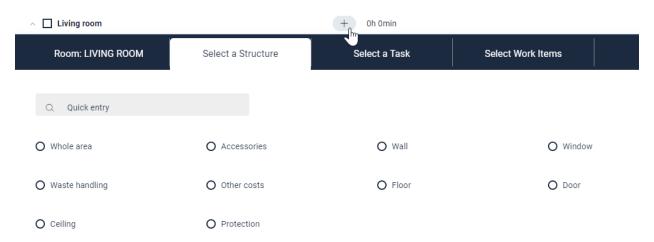


Add items within a work plan

If more work items are needed in an already existing plan, they can easily be added by clicking the + buttons on the right level.



Depending on the level the correct values for room, structure and task will be automatically selected to make it quicker and easier to add the needed ones.



The selection of items as well as recommended items is working in the same way as already described.

Apply a work plan template

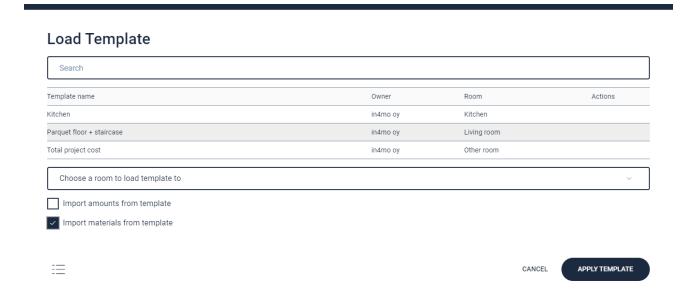
If you wish to import work items from a template, click on the Load template icon.



You will then see a list of available templates, both own templates, as well as shared templates. You can delete own templates by clicking the bin icon under the 'Actions' column to the right. Select the template you wish to import to your workplan, then select which room the work items should be imported to, as well as whether amounts or materials should be imported from the template as well. If these boxes are unchecked, only the work items will be added to the work

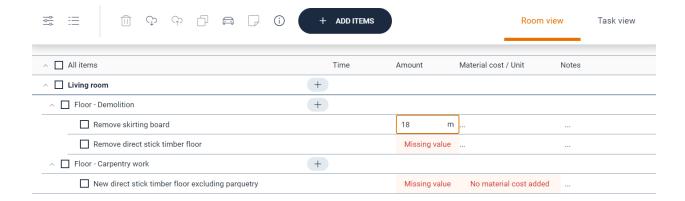


plan, while you have to add amounts and/or material manually. When you are ready, click on 'Apply template' to import the work items from the template.



Add amounts, materials and notes

When work items have been added, you must add an amount for them, as well as materials where relevant. The items that need this information are clearly marked in the plan with red text when the information is missing. It is also possible to add notes by clicking on the three dots under the Notes column.

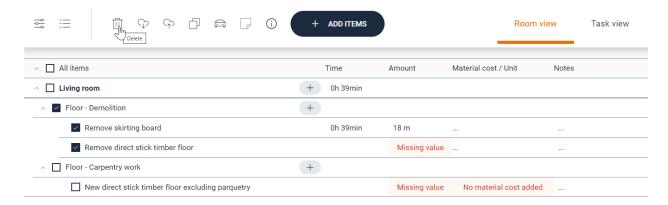




Delete work items

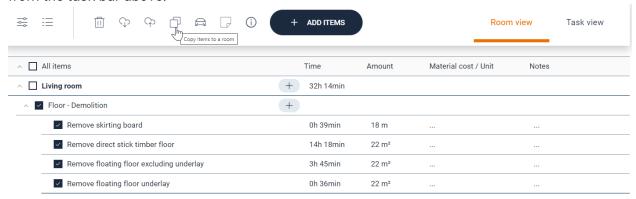
If work items are added by mistake or they need to be deleted by other reasons it is easy to select the items and delete several at the same time.

Select the items by clicking the boxes in front of them, or in front of the structure, task or room if that is the case, and then click the delete button. A confirmation dialog will be shown to make sure no mistakes are made.



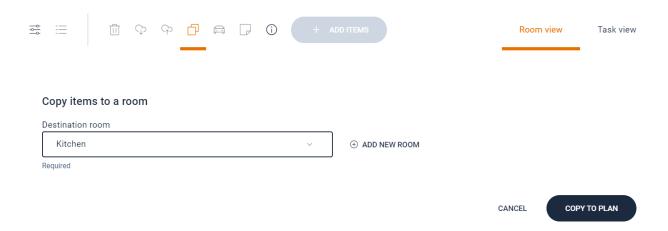
Copying work items to a room

It is possible to copy work items that have already been added to the work plan from one room to another. Simply tick off the boxes next to the items you wish to copy, then click the copy icon from the task bar above.



Select the room you wish to copy the work items to, then confirm by click 'Copy to plan'. If the room you wish to copy to have not yet been added to the work plan, click 'Add new room' to add the room first, then confirm by clicking 'Copy to plan'.



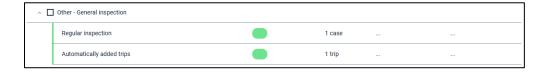


The work items are then copied to the selected room. Any amounts, materials or notes added to the original items will not be copied.



Automatic trips are shown in the work plan

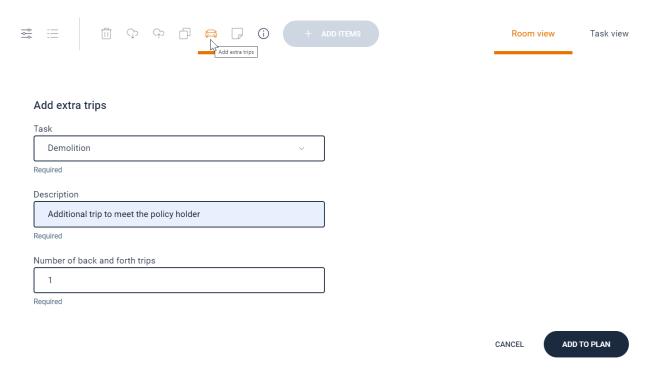
Trips added automatically to tasks are displayed in the work plan, in order to make it clear how many trips they get compensated for. These items cannot be edited in the work plan since they are handled automatically based on the settings for the assigned office.





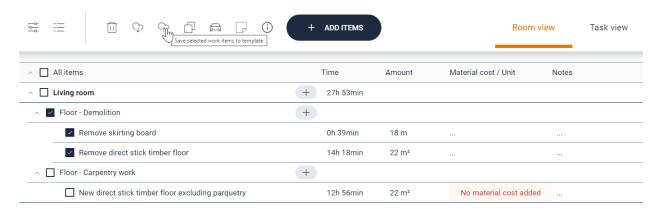
Add manual trips

To add trips to a task, simply click the trip button and select the task and the number of trips. Don't forget to write a comment explaining why the trip was added.



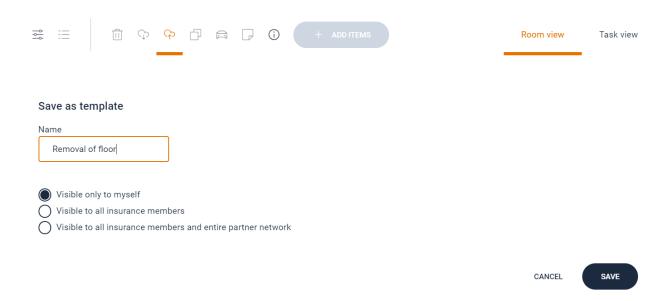
Save a work plan template

To save a work plan template the wanted work items, structures, rooms and tasks can be selected by clicking the boxes in front of them and then clicking the save template icon.



Input a name for the template and click 'Save' to save the template. Depending on your authority and role you might also have the option to select whether the template should be saved or only be used for own personal use.

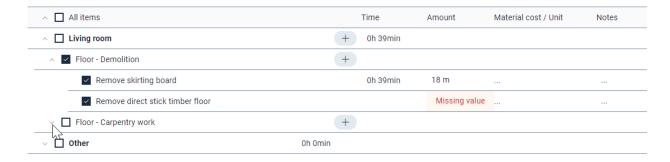




Expand and collapse the workplan

It is possible to expand and collapse the work plan based on the different levels in the plan. This means that bigger plans are easier to navigate and work in.

Simply click the arrow button to expand and collapse the section you want.



Mark initial workplan as ready

When the first version of the workplan is ready and the insurance company or other users should take actions, it should be marked as ready.

To mark the plan as ready just click the icon in the top bar.



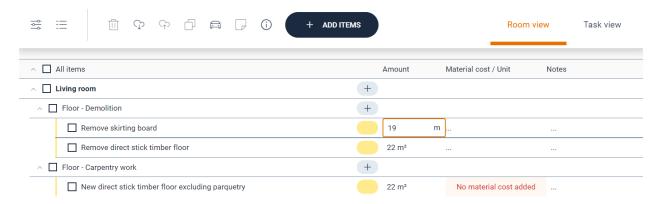


Editing work items sent for approval

It is possible to edit work items that have been sent for approval.

Please note that this possibility is only available in the new version of the work plan, not in the old one.

Editing a work item that have been sent for approval but have not been approved yet will change the status to draft so it must be sent for approval again. If all work items in a task that is in status B are edited the task status will change back to status 2 until the items are sent for approval again.



Removal of automatic trips in iCC tasks

When using in4mo Cost Calculation it is possible to define trips for tasks that will be applied automatically when tasks are assigned and are approved. It is possible to deactivate and remove these trips per task. This can be very useful to get the correct compensation when for example doing remote video inspections or have accommodation instead of driving back and forth while handling a task.

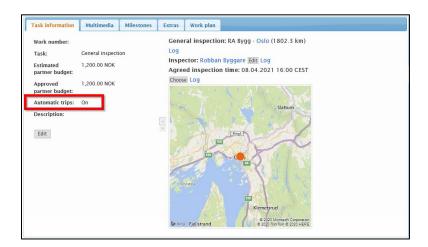
If a user has the rights to add manual trips to a task, they also have the right to remove and reactivate the automatic trips.

When the automatic trips are deactivated/removed for a task the cost control will be updated right away based on the change. If it is reactivated again the cost control will again be updated with the compensation for fixed and hour-based trips.

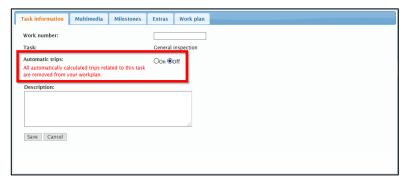
Please note that manually added trips are not affected by this feature meaning that they will not be removed, and it is possible to add manual trips when the automatic ones are deactivated.

In the task view a new field for automatic trips status is added and by default this is on in all tasks, meaning that the defined trip compensation for the assigned office will be applied.





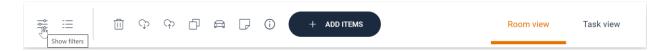
By clicking Edit the automatic trips can be turned off and if needed on again.



Filtering in the work plan

It is possible to apply filters to the work plan, in order to make it more organized as well as making it easier to find the information you are looking for.

To apply filters, click on the filter button from the menu bar.

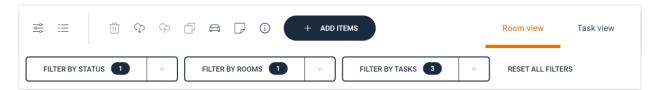


Select the wanted filters by statuses, rooms and tasks to view the wanted items. The filters can be combined as liked. The changes are visible right away in the workplan and more filters can be applied.





When filters are applied it is indicated per category by the number of filters marked.



Filters that are applied will be used in both Room and Task view. To remove filters either click "RESET ALL FILTERS" or unmark the wanted ones per category.

Refreshing the page will automatically reset all filters.

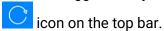


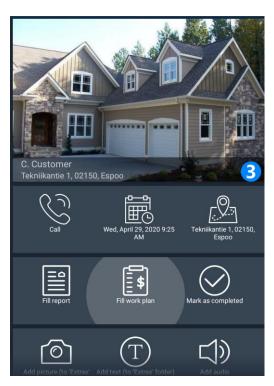
Creating a work plan from a tablet

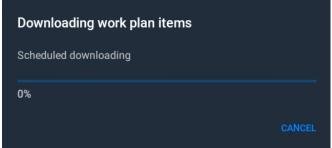
It is possible to create a work plan from the Task Reporter app on a tablet. Note that the work plan functionality is only available on tablets, not on phones. Creating a work plan from the app is possible in inspection tasks and project management. This is done the same way for both task types.

To access the work plan, open an inspection or project management task, then press **Fill work** plan.

When you open the work plan, there may be a small window popping up saying that it's downloading work plan items. This is done to synchronise the work plan with what's on the server, meaning that if work items have been added from the web portal or from another tablet, then this will be synchronised so that these items appear in the work plan on your tablet. You can also trigger this synchronisation manually at any time from the work plan by pressing the



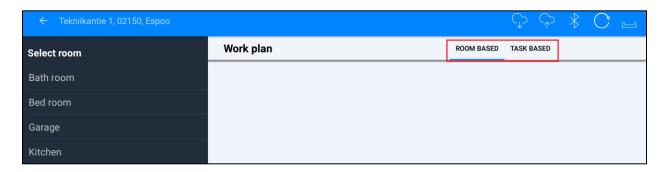




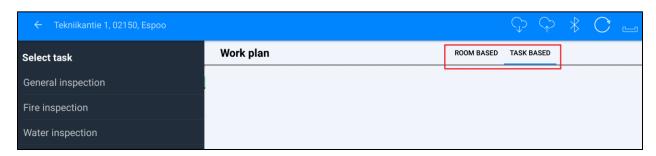
There are two structures which the work plan can follow; **Room based**, or **Task based**. By default, the system will show the work plan following a roombased structure, however it is possible to change this at any point inside a work plan by pressing the switch on the top right side. It is also possible to change the default structure in the app settings. Whatever structure you use does not affect what work items are available, they merely affect how you get to the work items.

The structure you choose determines how the list on the left side is structured. If following a **room-based** structure, the list on the left will show the name of different rooms, e.g. kitchen. When you press a room, you will next have to choose a structure, e.g. wall or floor. Choose one of the options, and you will see a list of the different tasks that exist in in4mo, e.g. demolition and carpentry work. Choose a task, and you will see all work items for this task and structure.





If following a **task-based** structure, you will first choose a task, e.g. demolition or carpentry work. When you have selected a task, you will next have to select a room, followed by structure, and then you will see the work items for this task and structure.

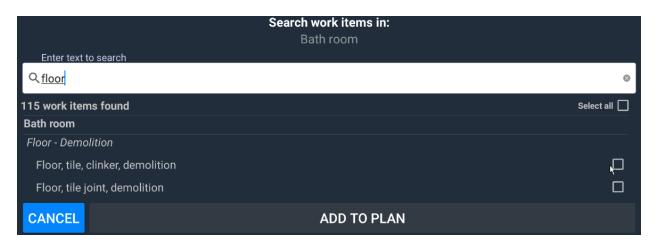




It is possible to search for work items by pressing the magnifying glass.

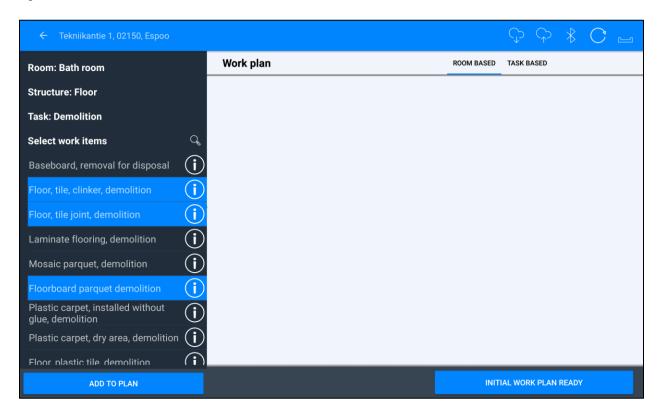
The search function is accessible after you have selected which room there should be searched under.

Once you have entered some text in the search field, you will get results based on the search. You can then choose to add some or all of the work items that appear in the result from the search.

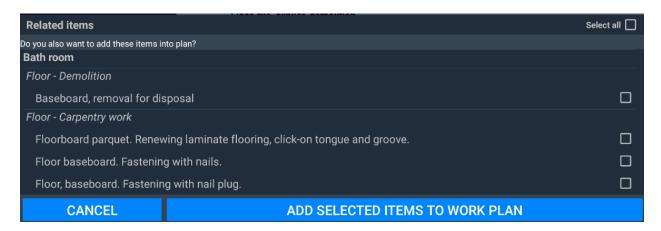




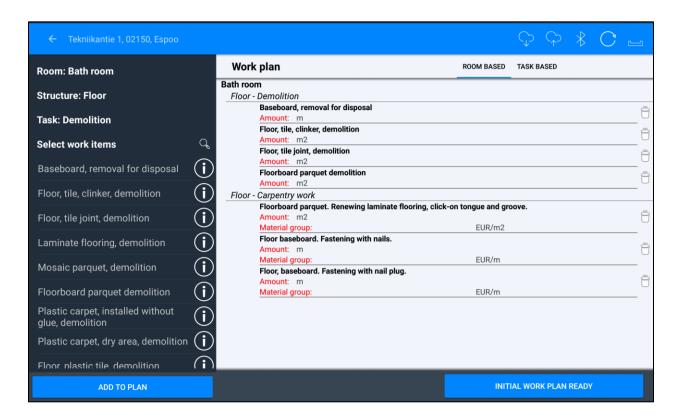
To add work items, mark the work items you want to add to the plan, then press **ADD TO PLAN** at the bottom of the screen. The items selected will then be added to the work plan, seen on the right side of the screen.



Many work items have a relation to other work items (e.g. if you demolish something, it might be that you will rebuild what was demolished). For such work items, when you add them to the work plan, you are asked if you wish to add related work items. You may then choose to add the related item (or items) or to just add the work item(s) you selected from the work item list to begin with. Related work items you choose to add will be added to the work plan in the same way as other work items.





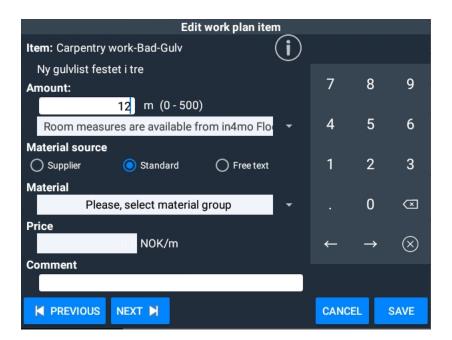


To add amounts and/or materials to a work item, or to make changes to a work items which already has an amount added, simply press the work item. In the window that opens, you can write the amount manually, or you can use measurements from the floorplan if you have created a floorplan using in4mo FloorPlanner during the inspection.

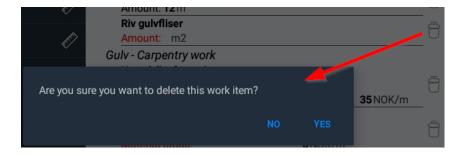
For work items that include a possibility of there being materials involved, you can also select materials and prices here. You can choose between material from a supplier (provided that suppliers are integrated into the portal), standard materials from the in4mo system, or free text.

When you're done, press **SAVE** to the bottom right, and you'll be back to the work plan, where the amount and/or material has been added. Note that the amount may have been added also to other related work items using the same measurement. The same amounts are automatically being inserted for other work items that have the same unit type (e.g. m) and are in the same room and structure (for example the floor in the bathroom).





If you wish to remove a work item, this is done by pressing the rubbish bin to the right of the item you want to remove. A pop-up asking for confirmation will appear. Press **YES** to delete the item.



When you are done with the work plan, you can press **INITIAL WORK PLAN READY**, which will mark the work plan as being ready from your side. This is done to tell the insurance company

that the calculation is ready, and that they can proceed with the case. It is still possible to edit a work plan after it is marked as above.



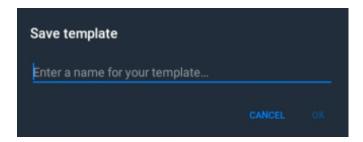
Saving and Loading Templates

It is possible to save the current workplan as a template, which can be used later. When you press the save template icon you will be prompted to enter a name for the template. This name will be displayed on the template list when you wish to import work items from a template later. Note that

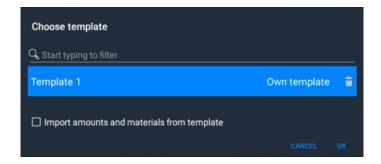




templates you save from the tablet are only available for own use, meaning that they will be available both on the tablet and from the web portal, however they will only be available to you.



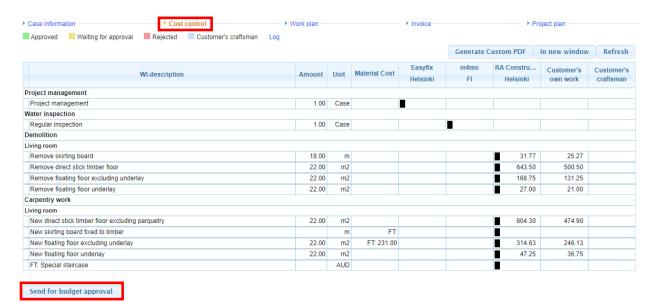
When you want to import work items from a template, press the load template icon. A list of available templates will appear. In addition to the name of the templates, there's also information about who and where it is from. Own template means that the template is your own personal template. There could also be templates made by insurance companies which have been made available to their partner network, in which case the name of the insurance company is shown. For customers of in4mo Contractor, it is also possible that there are templates shared across the whole company available.





Sending the workplan for approval

When you are ready with your work plan and wish to send it for approval, this is done under the tab 'Cost control'. Under the Cost control page you can see the work plan, and underneath the plan you find the button 'Send for budget approval'.



Select the items you wish to send for approval, then click "Send for approval'. The posts have now been sent for approval and are awaiting approval from whoever is responsible for approving the budget in the case.

