The object of this training guide is to provide a high level overview of KorInsight. A user can refer to this guide to help them with the bare essentials of KorInsight – registration, login, navigation, submitting and editing reports, searching for cases, and viewing cases.

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1. Registration

Open your web browser and go to: http://korinsightnm.korterra.com/login

Click on ‘Sign up now’ towards the bottom of the page to access the registration screen:

Fill out all of the required fields and then click the ‘Submit’ button. The following message will be displayed upon a successful submission of the form:
Next, go to the inbox of the email that you entered on the form. Find the email from support@korterra.com with the subject ‘KorInsight Registration’ and click on the link ‘Confirm Registration’.

Upon clicking the link you will be redirected to this screen:

Click the ‘SIGN IN’ button to return to the log in screen.
2. Logging in

To sign in to your account, enter the email address and password that you registered with. Then click the ‘SIGN IN’ button:

If you have forgotten your password click on ‘Forgot your password’. You will be prompted to enter your email address. A temporary password will be sent to that email address allowing you to log in. Then when you log in you will be asked to create a new password.
3. Home Page

Upon logging in you will be taken to the Home page:

This page will simplify your experience with KorInsight. You can accomplish any task in KorInsight using the four sections above.
4. Menu

The menu allows you to navigate the site regardless of what page you are on.

Notice that ‘My Reports’, ‘Case Search’, and ‘New Case’ take you to the same place, respectively, as ‘My Reports’, ‘Search’, and ‘Create a New Case’ on the Home page.
5. Submit a Report

If you have been given a case number to submit a report on, navigate to the Home page. Then enter the case number here:

After you entered the case number, click the ‘Submit a Report’ button. Alternatively, you can use the Case Search page to find the case for which you must submit a report on. Case Search will be discussed later in this guide.

After clicking ‘Submit a Report’ you will then be directed to the New 3rd Party Damage Report page:
Fill out the form and make sure that all of the required fields are filled in. Click the ‘Submit Report’ button, located at the top or bottom of the page, when you are finished:
At any time when filling out a report you can also save it as a draft. This allows you to go back and finish it later. Simply click the ‘Save Draft’ button located at the top or bottom of the page to do this.

Clicking on either of the previous buttons will display a window asking you to confirm your action. After you confirm the action you will be presented with a window similar to this:

Clicking on the ‘Go to ….’ button will bring you to the Case View page for that case. Case View will be discussed later in this guide.

The ‘Go to My Reports’ button will take you to the My Reports page.
6. My Reports

The My Reports page contains all of the reports you have submitted or saved as a draft. From here you can finish any drafts that you saved, or edit any reports that you have submitted.

The two primary ways to get to My Reports are shown here:

If you want to edit a report, or finish a saved draft, click the edit button on the right hand side for which ever case you want to work on:

You can also click on the case number:

This will take you to the Case View for that particular case.
7. Case View

Case View contains a list of all the reports for a case and allows you to view them. You can access Case View by clicking any blue case number, either in My Reports or Case Search:

You will then be taken to the Case View for that case:

This is an example of a case where you have already submitted or saved a report. From here you can view all of the reports for the case and edit your report:
If you are in the Case View for a case where you have not submitted or saved a report you will be given the option to create a report:

Case view also allows you to upload files using the Attachments tab:
8. Case Search

You can search for any case in the system using Case Search. You can access case search by clicking ‘Case Search’ on the menu, ‘Search’ on the Home page, or by click the small ‘Search’ button at the top of the page without a case number entered:

Using any of those three methods you will be taken to the case search page:

From here you can search for cases using any combination of the search criteria. If you want to search for all cases simply leave the boxes blank and click the green ‘Search’ button.

After you click search you will see a list of all the cases that match the search criteria:
To modify your search click on the ‘Search Form’ button:

This will bring back the search form and allow you adjust your search criteria.

You can also use the convient filter box to only show cases with data that match what you type:

Once you have selected the case you can click on the case number to view it:
While viewing you may choose to view the initial report that was submitted, or any additions that have been added by clicking on each Report number