

Schedule Manager – Appraiser

Overview

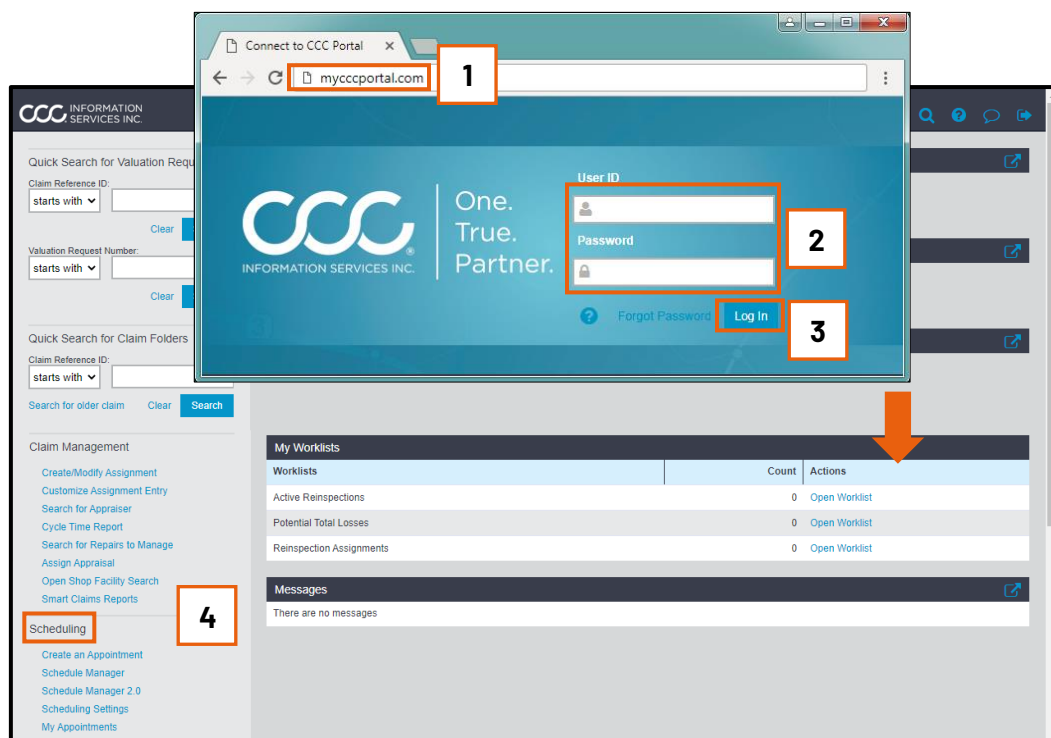
Schedule Manager is a feature in CCC® Scheduling that graphically displays an appraiser's daily work schedule. Schedule Manager includes map routes and any scheduled activities.

This job aid will show how to use Schedule Manager to track and manage your appointments and activities.

Accessing Schedule Manager

To access the Schedule Manager, use the following steps:

Step	Action
1	Open Internet Explorer and go to mycccportal.com .
2	Enter your User ID and Password .
3	Select Log In . The CCC Portal Home page opens.
4	In the Scheduling section on the portal home page, select the Schedule Manager link.



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Schedule Manager – Appraiser, Continued

Appointment Map

The **appointment map** in Schedule Manager shows the appraiser's scheduled appointments for the selected time-period. Use the following to navigate Schedule Manager.

Part	Description
1	Select Today to jump to today's date. Use the calendar to select a date to view appraiser's appointments. The time zone displays the browser's default time, use the drop down to view the appointments in another time zone.
2	Select a range of 1 day , 2 day , 3 day or 1 week . Use the directional arrows to revert/advance by the selected range.
3	Select the pin next to the appraiser to view the appraisal appointments on the map.

The Schedule Manager map shows your **appointment location(s)**. Appointments are indicated **alphabetically** for the order of each appointment (Ex: C= 3rd appointment of the day).

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Schedule Manager – Appraiser, Continued

Appointment Map, Continued

An icon with the **number of appointments** will appear at a location if there is more than one appointment at the same address.

The screenshot displays the Schedule Manager interface. At the top, a map shows a street grid in Chicago. A red pin is placed on a location, and a pop-up window displays the following information:

- Type: Drive in 2
- Claim: BH17081805
- Contact: Bill Hamilton
- Time: Oct 27, 7:54 AM
- Window: Oct 27, 7:00 AM - 9:00 AM
- Shared Address: 4417 N Avers Ave, Chicago, IL 60625

Below the map, a schedule grid is shown for Friday, October 27. The grid has columns for time slots from 7AM to 4PM. The row for the Chicago team shows an appointment for Raman, Sandhya at 8AM. The appointment is represented by a red pin icon with the number 2, indicating two appointments at the same address.

Team	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM
Chicago team										
Raman, Sandhya		BH17081805 Bill Hamilton Chicago 60625					Lunch/B			

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Schedule Manager – Appraiser, Continued

Appointment Details

To view **appointment details** directly from Schedule Manager:

Step	Action
1	Select an appointment .
2	Select View in the drop list.
3	<p>The appointment details page opens. When finished viewing select Close.</p> <p>Note: Notes can be added by selecting Add Notes and entering a note in the field, then select Save.</p>

Additionally, appointment details can also be viewed by hovering the cursor over an appointment.

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Schedule Manager – Appraiser, Continued

Appointment Map

To edit the **appointment duration** directly from Schedule Manager:

Step	Action
1	Select an appointment.
2	Select Edit in the drop list.
3	In the pop-up window, enter a new duration into the Time field. If necessary, add notes.
4	Select Save .

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Schedule Manager – Appraiser, Continued

Appointment Map

To **Edit** the breaks or activates directly from the Schedule Manager:

See steps 1 and 2 in the *Edit Appointment Duration* section.

Step	Action
3	In the pop-up window, edit as needed.
4	Select Update .

New Activity

Details

Field Appraiser:

Activity Type:

Activity Start Time:

Activity End Time:

Earliest Start Time: Latest:

Duration: Minutes

☐ All Day Activity

Address

Street Address:

City/State/Zip:

Time Zone:

Notes

4
Update Cancel

To Add a New Activity from the Schedule Manager, select and drag in the appraiser's schedule to create the activity. The New Activity window opens, add information as needed, such as activity type, then select **Save**.

Schedule Manager

Map Satellite ☒ ☐

Jump To: Today

Team	6AM	7AM	8AM	8:55 - 9:30	10AM	11AM
Chicago team				<div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid gray; padding: 2px; margin: 2px;"> <div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: green; border-radius: 50%; margin-right: 5px;"></div> <div style="font-size: 0.8em;">08:55 09:30</div> </div> </div> </div>		
John, Doe						

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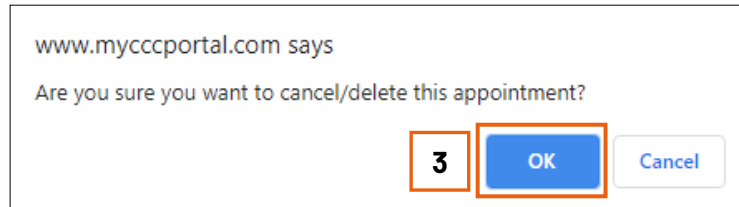
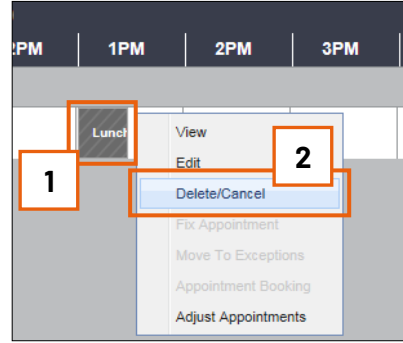
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Schedule Manager – Appraiser, Continued

Delete or Cancel Appointment

To **Delete or Cancel** the appointment directly from the Schedule Manager:

Step	Action
1	Select an Appointment or Activity .
2	Select Delete/Cancel in the drop list.
3	Select OK to confirm.



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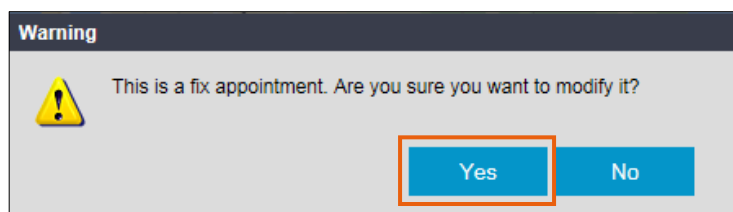
Schedule Manager – Appraiser, Continued

Fix Appointment

To **Fix** an Appointment directly from Schedule Manager:

Step	Action
1	Select an appointment.
2	Select Fix Appointment in the drop list.
3	In the pop-up window, select Proceed .
4	A lock icon appears on the appointment. Note: Adjust Appointment will not have any effect on Fix Appointments.

If you attempt to move a fixed appointment, a warning message will appear. Select **Yes** to accept your modifications or **No** to cancel.

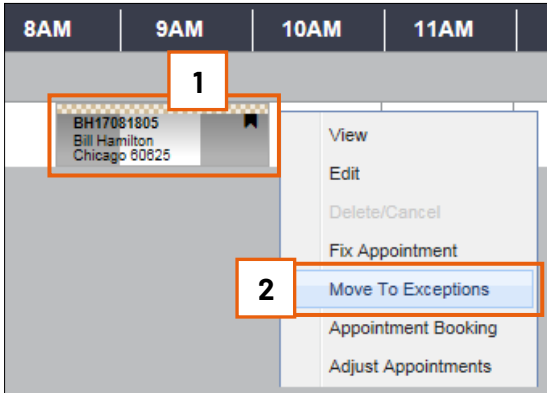


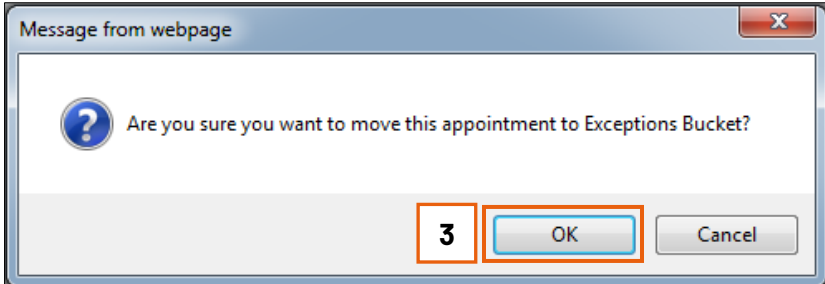
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Schedule Manager – Appraiser, Continued

Move to Exceptions

To **move an Appointment to Exceptions** directly from Schedule Manager:

Step	Action	
1	Select an appointment.	
2	Select Move To Exceptions in the drop list.	
3	Select OK to confirm. The appointment will be moved to the Exceptions tab.	



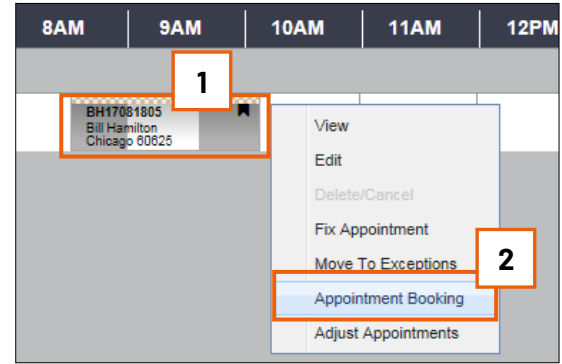
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Schedule Manager – Appraiser, Continued

Appointment Booking

To open **Appointment Booking** from Schedule Manager:

Step	Action
1	Select an appointment.
2	Select Appointment Booking in the drop list.
3	The Appointment Booking page opens, make any necessary changes.

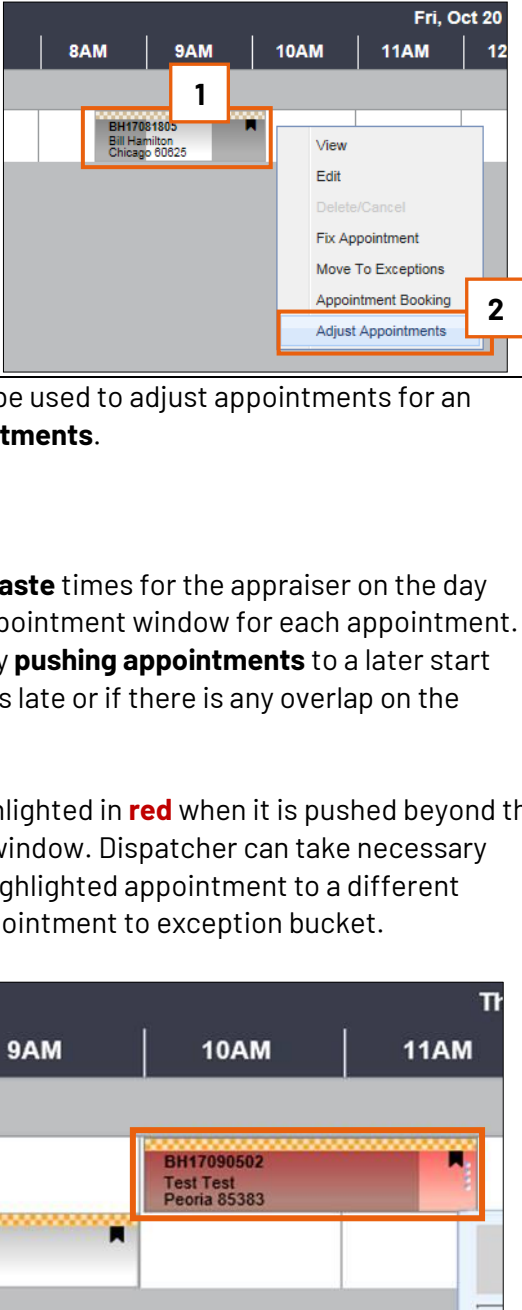


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Schedule Manager – Appraiser, Continued

Adjust Appointments

To **Adjust Appointments** from Schedule Manager:

Step	Action
1	Select an appointment.
2	Select Adjust Appointments in the drop list.
3	<p>Adjust Appointment can be used to adjust appointments for an appraiser's all-day appointments.</p> <p>The Adjust Appointments:</p> <ul style="list-style-type: none"> Removes the gap/waste times for the appraiser on the day without violating appointment window for each appointment. Resolves conflicts by pushing appointments to a later start time if appraiser runs late or if there is any overlap on the appointments. <p>Note: Appointment is highlighted in red when it is pushed beyond the committed appointment window. Dispatcher can take necessary steps to reschedule the highlighted appointment to a different appraiser or move the appointment to exception bucket.</p> 

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Schedule Manager – Appraiser, Continued

Create Desk Activity

You can create a **Desk Activity** by selecting the “Desk Activity” check box.

Note: Travel time will **not** be calculated for a Desk Activity. Use this when there is **no** travel time involved in the reinspection, or when the time needs to be blocked **without** including travel time.

New Activity

Details

Field Appraiser: D. JOHN

Activity Type: Reinspection

Activity Start Time: 2018-09-17 12:35 PM

Activity End Time: 2018-09-17 01:20 PM

☐ All Day Activity ☒ Desk Activity

Claim Number: BH00000000

Address

Street Address: 1 Way St

City/State/Zip: Chicago IL 60000

Time Zone: Central Time

Notes

Save Cancel

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Schedule Manager – Appraiser, Continued

Tie Activity to an Existing Claim

An Activity can be tied to an **existing claim** by entering the claim number and selecting Save.

The 'New Activity' form contains the following fields and values:

- Field Appraiser:** D. JOHN
- Activity Type:** Reinspection
- Activity Start Time:** 2018-09-17, 12:35 PM
- Activity End Time:** 2018-09-17, 01:20 PM
- ☐ All Day Activity
- ☒ Desk Activity
- Claim Number:** BH00000000 (highlighted with an orange box)
- Address:**
 - Street Address: 1 Way St
 - City/State/Zip: Chicago, IL, 60000
 - Time Zone: Central Time
- Notes:** (empty text area)
- Buttons:** Save (highlighted with an orange box) and Cancel

The **Claim Number** will be displayed on the Activity. Hover-over and the View Activity details screen opens.

The left screenshot shows a calendar view for Monday, September 17, with a hover-over card for the 'Reinspection' activity. The card displays the following information:

- Reinspection**
- Date: Mon, Sep 17
- Time: 12:35 - 01:20 (45 mins)
- Travel: 0 mins
- Address: 1 Way St, Chicago, IL, 60000
- Desk Activity: Yes
- Claim Number: BH00000000** (highlighted with an orange box)
- Notes:


The right screenshot shows the 'Reinspection' details screen with the following information:

- Date:** Mon, Sep 17
- Time:** 12:35 - 01:20 (45 mins)
- Travel:** 0 mins
- Address:** 1 Way St, Chicago, IL, 60000
- Desk Activity:** Yes
- Claim Number:** BH00000000 (highlighted with an orange box)
- Buttons:** Edit and Close

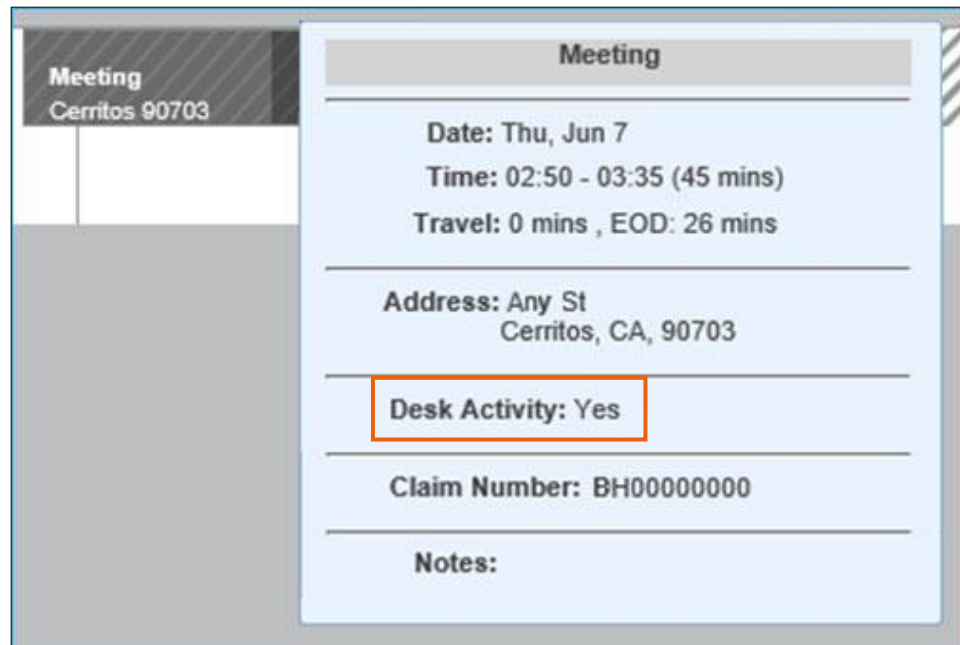
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Schedule Manager – Appraiser, Continued

Mobile Device Status Updates

When you **update** an activity status using the Mobile device, Schedule Manager will also automatically **update** the activity in **real time** and will display the appropriate icon (e.g. ).

Note: When you hover over an appointment, the roll over window now indicates if this is a Desk Activity by displaying Yes or No.



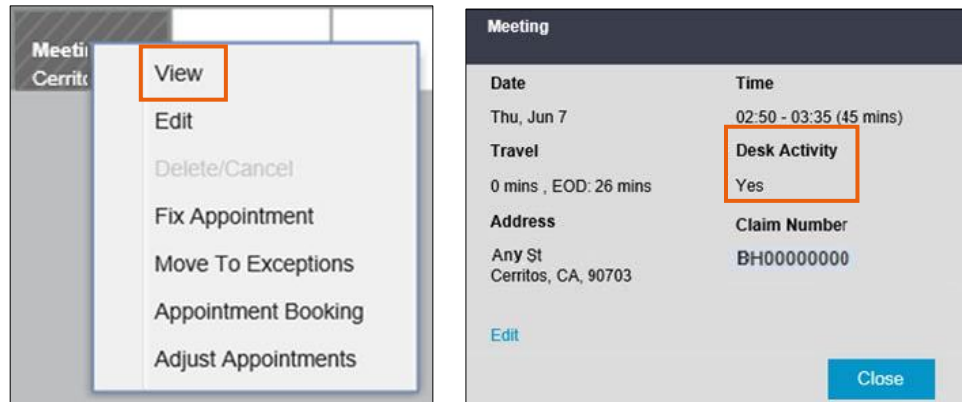
Meeting
Cerritos 90703
Date: Thu, Jun 7
Time: 02:50 - 03:35 (45 mins)
Travel: 0 mins , EOD: 26 mins
Address: Any St Cerritos, CA, 90703
Desk Activity: Yes
Claim Number: BH00000000
Notes:

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Schedule Manager – Appraiser, Continued

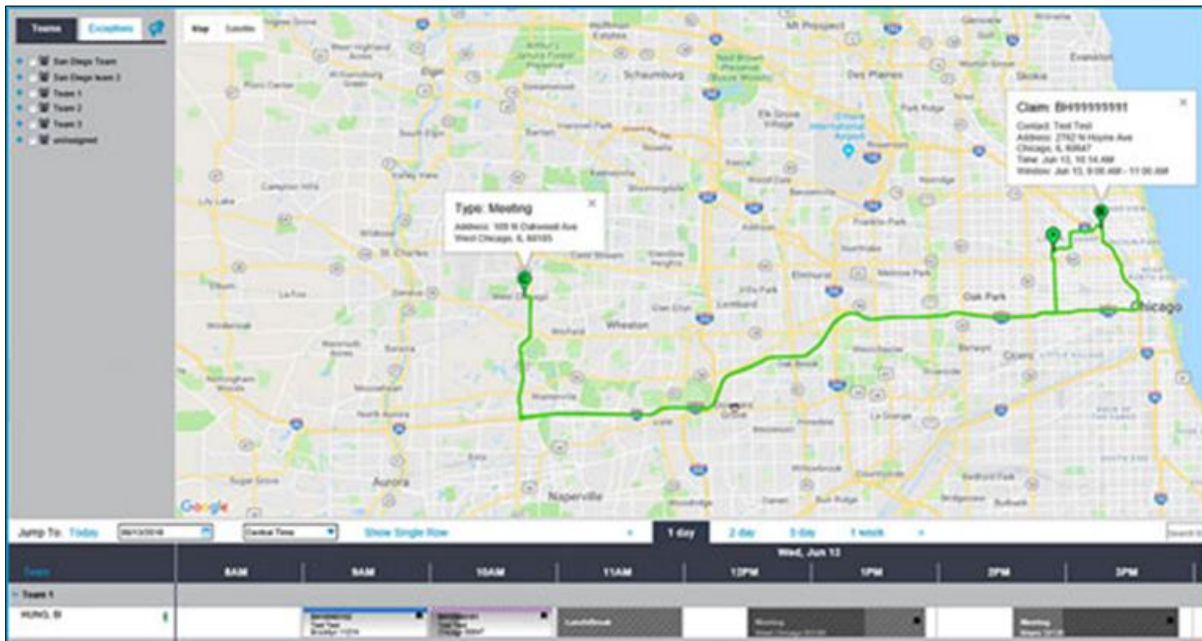
Desk Activity Displays: Yes or No

You can select the Activity to display the **Details** screen. Selecting **View** will indicate if it is a **Desk Activity** by displaying either Yes or No:



Desk Appointment and Desk Activity Map Display

The sequence on the schedule considers **all** appointments and activities, but the route map does **not** display **Desk Appointment** or **Desk Activity** locations:



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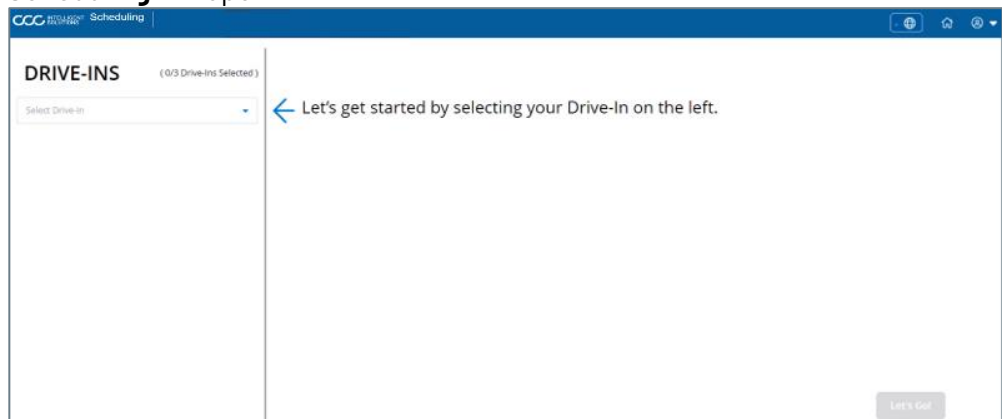
Schedule Manager – Appraiser, Continued

Schedule Manager Drive-In

Select the link under Scheduling titled **Schedule Manager Drive-In**.

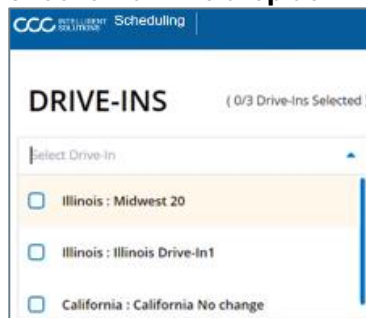


Scheduling will open.



Scheduling

Choose from the **drop down** list the **Drive-In** facility preferred.



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Schedule Manager – Appraiser, Continued

Scheduling, Continued

This will show how many **active** Bays are currently available. The user can **select and deselect** Bays here if needed.

The screenshot shows the 'DRIVE-INS' section on the left with a dropdown menu set to 'Illinois : Illinois Drive-In1' showing '2 Bays'. The main area on the right shows 'Illinois : Illinois Drive-In1' with checkboxes for 'Bay 1' and 'Bay 2', both of which are selected. A 'NOTICE' box on the right states: 'Drive-in time zone will be defaulted to the Drive-In's location. If multiple Drive-Ins are viewed, the time zone will be defaulted to the first Drive-In selected.' At the bottom right, there is a link 'Click here to finalize your Drive-Ins.' and a blue button labeled 'Let's Go!'.

Next, select **Let's Go!** at the bottom of the screen.

This screenshot is identical to the previous one, but the 'Let's Go!' button at the bottom right is highlighted with a red rectangular box.

Appointments and Activities

The Gantt view for Drive-Ins will open. The calendar will **default** to the current day.

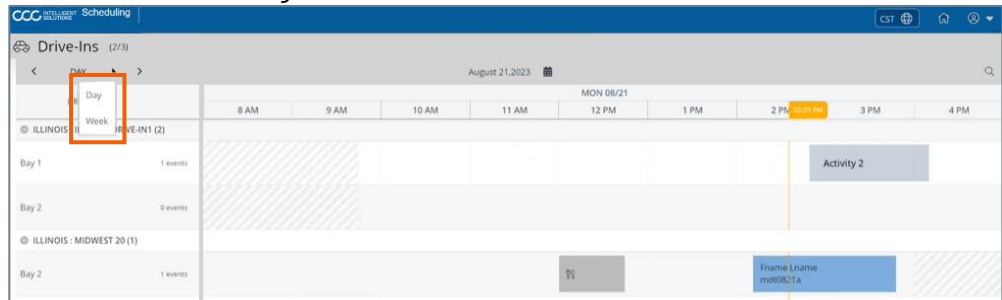
The screenshot shows the 'Drive-Ins' Gantt view for August 21, 2023 (Monday). The interface displays a timeline from 8 AM to 4 PM. Under the heading 'ILLINOIS : ILLINOIS DRIVE-IN1 (2)', there are two rows: 'Bay 1' with '1 events' and 'Activity 2' scheduled from approximately 2:30 PM to 3:30 PM; and 'Bay 2' with '0 events'. Under the heading 'ILLINOIS : MIDWEST 20 (1)', there is one row: 'Bay 2' with '1 events' and an event titled 'Frame Name mtr0821a' scheduled from approximately 12:30 PM to 1:30 PM.

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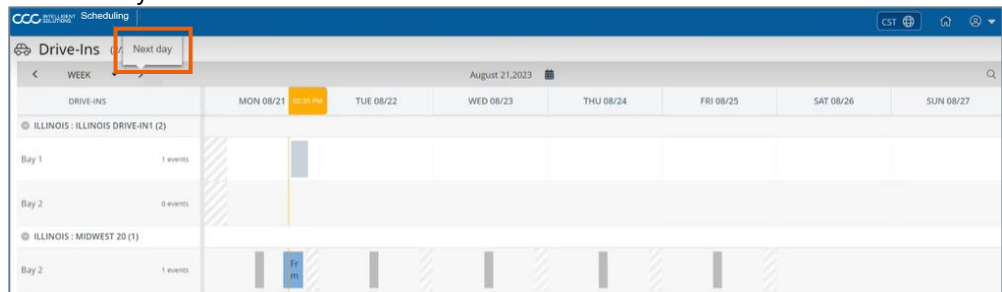
Schedule Manager – Appraiser, Continued

Appointments and Activities, Continued

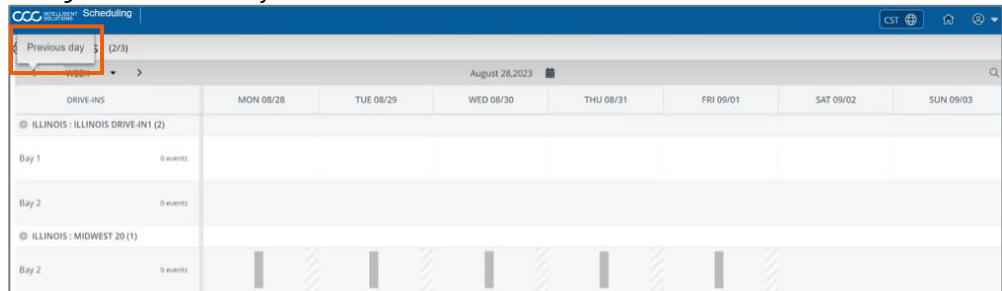
The view can be changed to a **full week**.



The user can view the **Next Day** or **upcoming weeks** appointment by using the **>** arrow key.



The user can also view the **Previous Day** or previous weeks appointments by using the **<** arrow key.

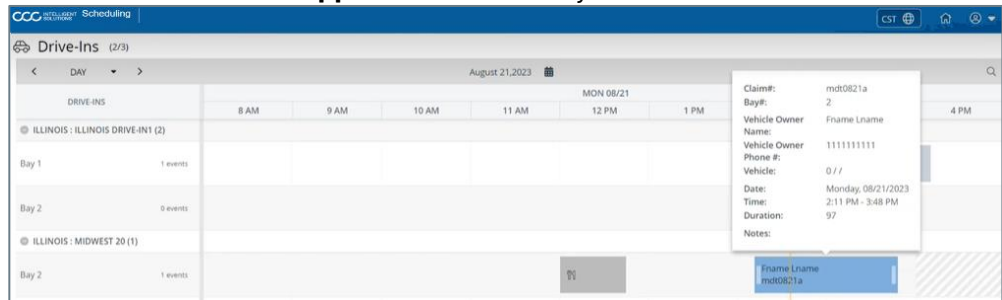


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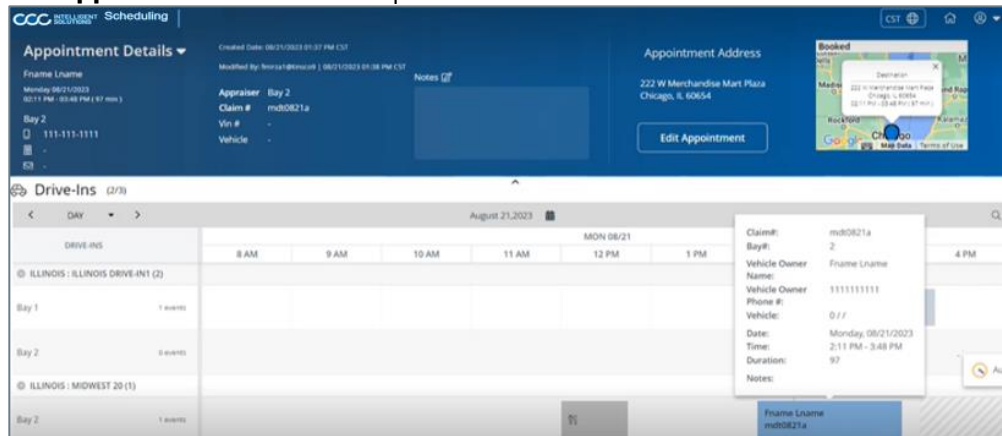
Schedule Manager – Appraiser, Continued

Appointments and Activities, Continued

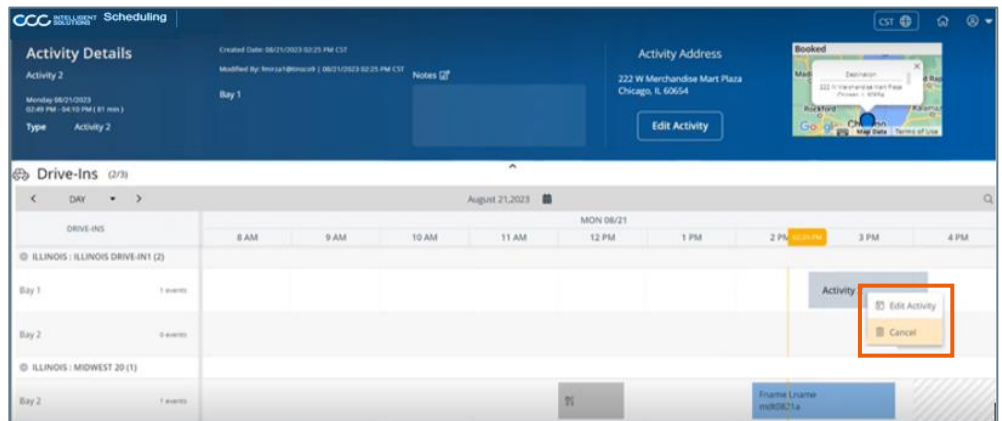
The user will select the **appointment** that they want to see.



The **appointment details** will open.



The user can **Edit** or **Cancel** the activities.



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Schedule Manager – Appraiser, Continued

Appointments and Activities, Continued

The user can **add** new activities by selecting on the calendar.

The screenshot displays the CCC Scheduling interface. A 'Create Activity' modal is open, showing the following fields:

- Activity Details:**
 - Resource*: Illinois : Illinois Drive-In1 (Bay 2)
 - Activity Type*: (dropdown menu)
- Date & Time:**
 - Start Time*: 08/21/2023 03:14 PM
 - End Time*: 08/21/2023 03:45 PM
 - Time Zone*: CST
 - ☐ All Day Activity
 - [Recurrence](#)

The background shows a calendar view with a 'Drive-Ins' section. A map on the right shows the location of the activity at Merchandise Mart Plaza, Suite 4, 60654.