

Schedule Manager – Dispatcher/ Manager

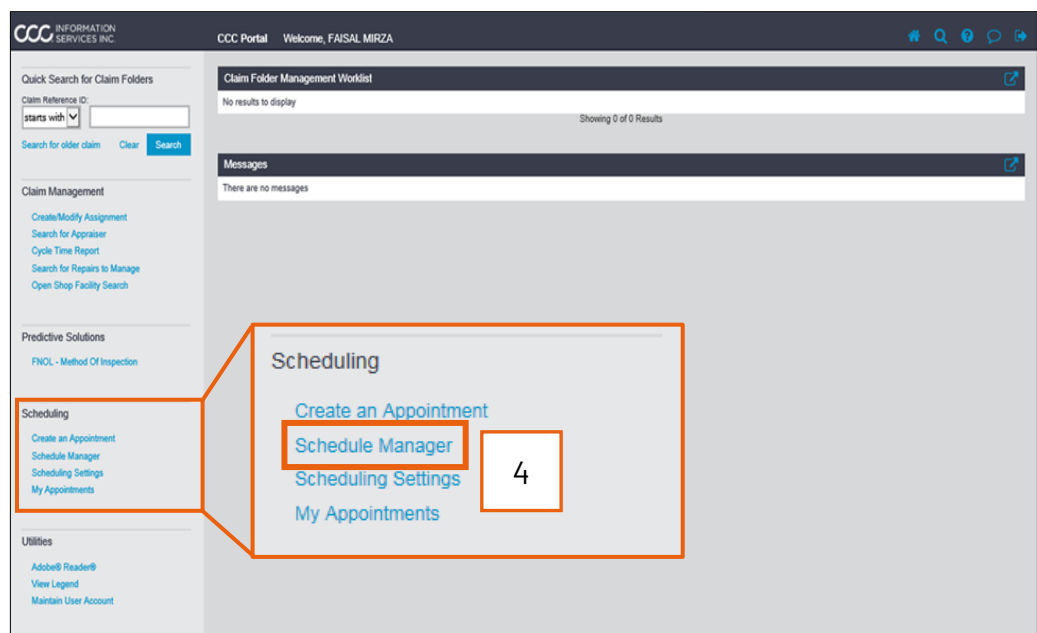
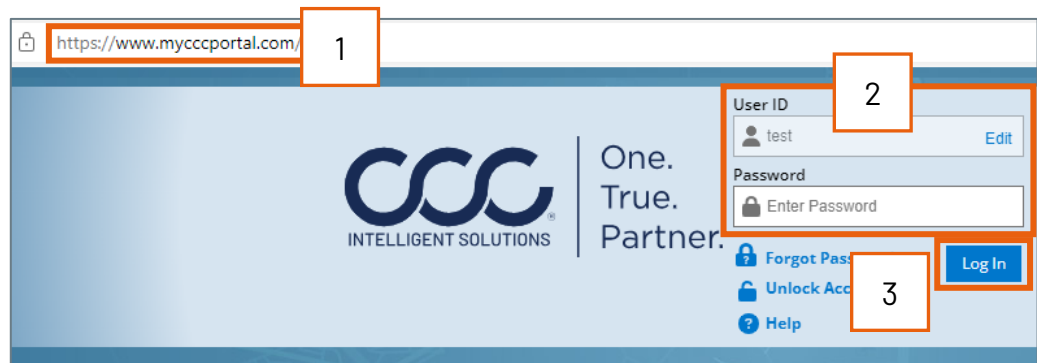
Overview

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 appraisers' schedules.

Accessing Schedule Manager

To access the Schedule Manager, use the following steps:

Step	Action
1	Log on to mycccportal.com .
2	Enter your User ID and Password .
3	Click 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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Teams Tab

The **Teams** tab shows the teams associated with your company and the appraisers in those teams. Use the following to navigate Schedule Manager.

Part	Description
1	Select the plus sign to expand a team, select an appraiser or multiple appraisers using the adjacent checkboxes. The selected appraisers will appear in the Teams section.
2	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 browsers default time, use the drop down to view the appointments in another time zone.
3	Select a range of 1 day , 2 day , 3 day or 1 week . Use the directional arrows to revert/advance by the selected range.
4	Select the pin next to the appraiser in the Team section to view the appraisal appointments on the map. Each appraiser's appointment location and route are color coded.

The screenshot shows the Schedule Manager interface. Callout 1 points to the 'Teams' tab on the left sidebar. Callout 2 points to the 'Jump To:' section, which includes a date selector (Today, 08/31/2017), a time zone dropdown (Central Time), and a range selector (1 day, 2 day, 3 day, 1 week). Callout 3 points to the map area showing a route through Chicago. Callout 4 points to the 'Chicago team' section in the bottom left, which lists appraisers: COOLIDGE, CALVIN, L, Rick, and John, Doe. The main area displays a calendar grid with appointments for each appraiser, including names, phone numbers, and locations.

Note: A maximum of 15 appraisers can be viewed a one time.

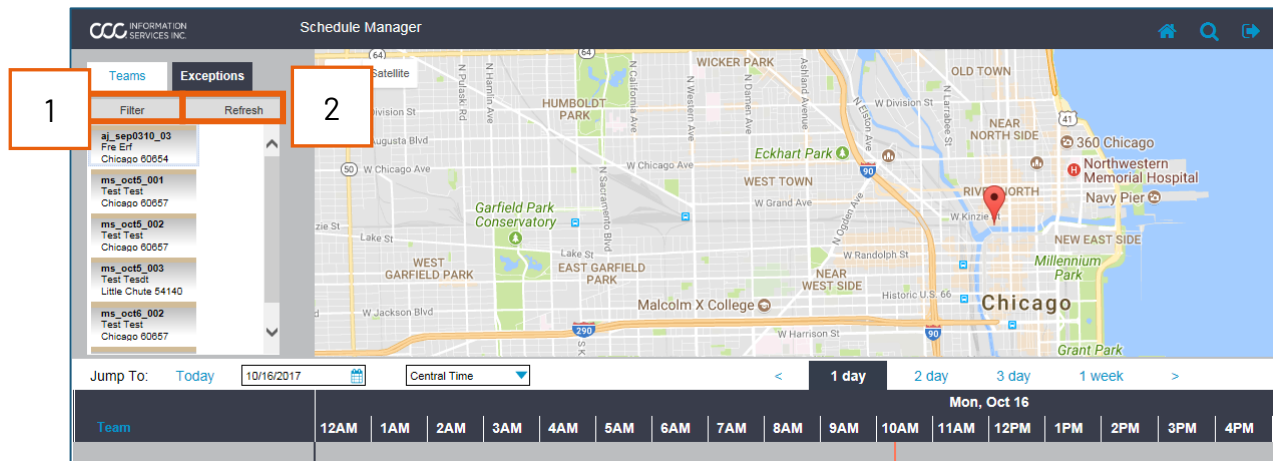
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Exceptions Tab

The Exceptions tab shows appointments that are cancelled due to the following reasons:

- Appraiser was turned to Inactive.
- Appraiser's territory coverage was updated and appraiser no longer covers the appointment location in his/her territory.
- Appraiser's shift hours were changed.
- Appointment was moved to exception bucket from schedule manager.
- Customer/Appointment contact no show to the appointment.



Part	Description
1	<p>Select the Filter link to:</p> <p>Filter By:</p> <ul style="list-style-type: none"> • Assignment Created in • Status <p>Sort By:</p> <ul style="list-style-type: none"> • Assignment Created Date • Appointment Last Modified Date • Reverse Sort Order
2	<p>Select the Refresh link to update the Exceptions tab.</p>

Filter

Filter By:

Assignment Created in

☒ Past 7 days
 ☒ Past 8-14 days
 ☐ Past 15-30 days
 ☐ Past 30-60 days

Status

☒ Appraiser Inactive
 ☒ Appraiser Territory changed
 ☒ Sent to Exceptions Bucket
 ☒ Moved by user
 ☒ Shift Modified

Sort By:

☒ Assignment Created Date
 ☐ Appointment Last Modified Date
 ☐ Reverse Sort Order

Save

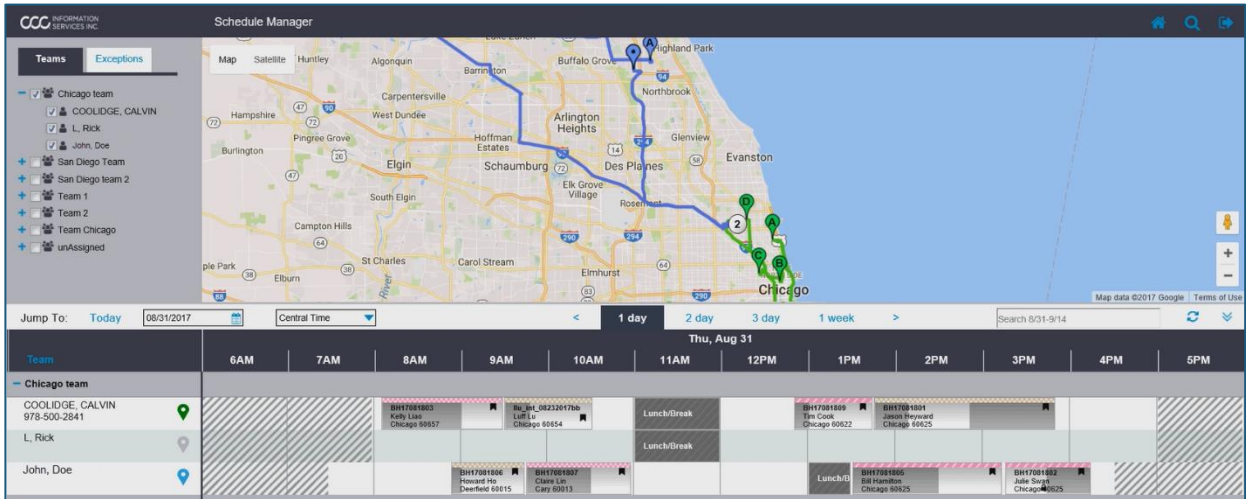
Cancel

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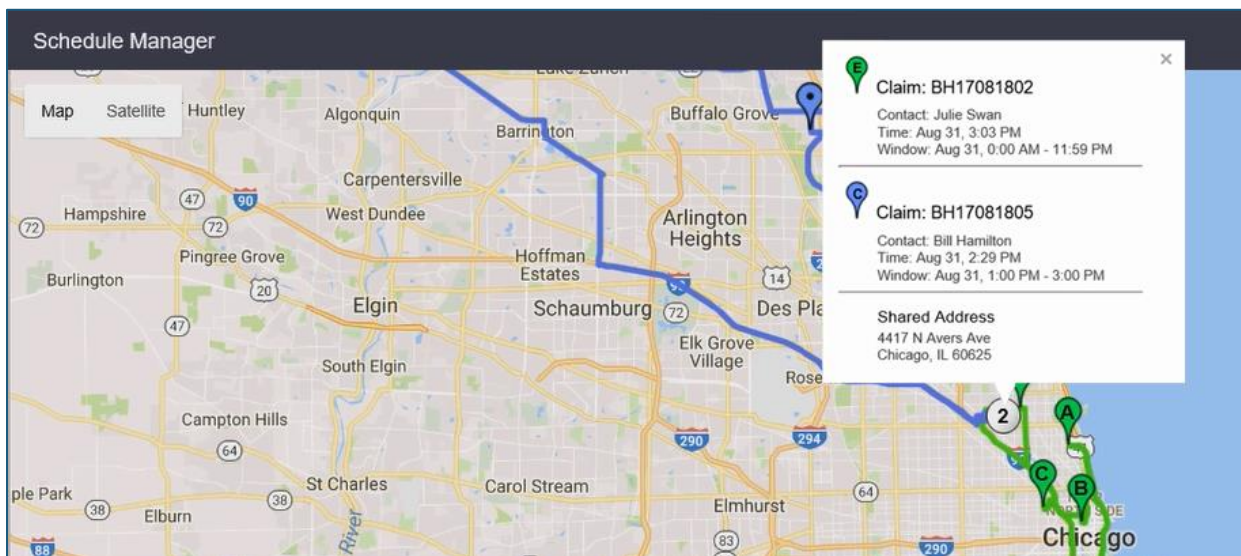
Schedule Manager Map

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



Same Site Appointment Notification

An icon with the number of appointments will appear at a location if there is more than one appointment at the same address. If multiple appraisers are visiting the same location a manager can use this information to determine if a single appraiser can visit the location.



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View Appointment

To View appointment details directly from Schedule Manager:

Step	Action
1	Right-click on an appointment.
2	Click on View in the drop list.
3	<p>The appointment details page opens, when finished viewing click Close.</p> <p>Note: Notes can be added by clicking Add Notes and entering a note in the field, then click Save.</p>

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

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Edit Appointment Duration

To Edit the appointment duration directly from Schedule Manager:

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

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Edit Breaks/ Activity

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 the fields as needed.
4	Click Update .

New Activity

Details

Field Appraiser: John, Doe

Activity Type:

Activity Start Time: 2017-10-20 01:00 PM

Activity End Time: 2017-10-20 01:30 PM

Earliest Start Time: 01:00 PM Latest: 01:30 PM

Duration: 30 Minutes

☐ All Day Activity

Address

Street Address:

City/State/Zip: null-

Time Zone: Central Time

Notes

4

Update Cancel

To Add a New Activity from the Schedule Manager, **click and drag** (#1) in the appraiser's schedule to create the activity. The New Activity window opens, add information as needed, such as activity type, then click **Save** (#2).

New Activity

Details

Field Appraiser: Doe, John

Activity Type:

Activity Start Time: 2021-06-03 08:55 AM

Activity End Time: 2021-06-03 09:30 AM

☐ All Day Activity ☐ Desk Activity

Claim Number:

Address

Street Address: [21 - 75] Calle Parcelas Irizarry, 1

City/State/Zip: Adjuntas PR 00601

Time Zone: Central Time

Notes

2

Save Cancel

Chicago team

John, Doe

8AM 10AM 11AM

08:55 09:30

1

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

Step	Action
1	Right-click on an Appointment or Activity .
2	Click on Delete/ Cancel in the drop list.
3	Click OK to confirm.

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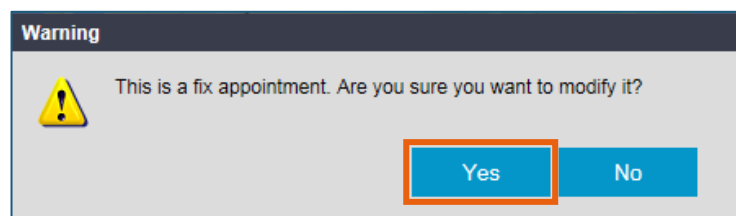
Schedule Manager – Dispatcher/ Manager, Continued

Fix Appointment

To Fix an Appointment directly from Schedule Manager:

Step	Action
1	Right-click on an appointment .
2	Click on 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, click **Yes** to accept your modifications or No to cancel.



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Move to Exceptions

To move an Appointment to Exceptions directly from Schedule Manager:

Step	Action
1	Right-click on an appointment.
2	Click on Move To Exceptions in the drop list.
3	Click OK to confirm. The appointment will be moved to the Exceptions tab.

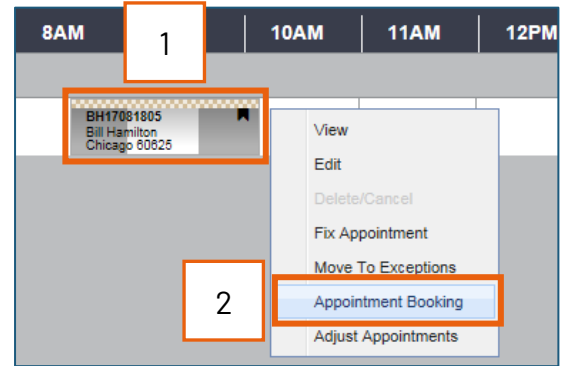
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Appointment Booking

To open Appointment Booking from Schedule Manager:

Step	Action
1	Right-click on an appointment.
2	Click Appointment Booking in the drop list.
3	The Appointment Booking page opens, make any necessary changes.



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Adjust Appointments

To Adjust Appointments from Schedule Manager:

Step	Action
1	Right-click on an appointment.
2	Click 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 time 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.

Note: Appointments are highlighted in red when it is pushed beyond the committed appointment window. The dispatcher can take the necessary steps to reschedule the highlighted appointment to a different appraiser or move the appointment to exception bucket.

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Create Desk Activity

You can create a **Desk Activity** by selecting the “Desk Activity” check box (#1).

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.

The screenshot shows the 'New Activity' form with the following 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 (highlighted with a red box and the number 1)
- Claim Number:** BH00000000
- Address:**
 - Street Address:** 1 Way St
 - City/State/Zip:** Chicago, IL, 60000
 - Time Zone:** Central Time
- Notes:** (Empty text area)
- Buttons:** Save, Cancel

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Tie Activity to an Existing Claim

An Activity can be tied to an existing claim by entering the Claim Number (#1) and clicking on Save (#2).

The Claim Number will be displayed on the Activity hover-over (#3) and the View Activity details screen (#4).

The figure consists of four numbered screenshots illustrating the process of tying an activity to an existing claim.

Screenshot 1: New Activity Form
This screenshot shows the 'New Activity' form. The 'Claim Number' field is highlighted with a red box and labeled with a red '1'. The 'Save' button is highlighted with a red box and labeled with a red '2'. The form includes fields for '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' (unchecked), 'Desk Activity' (checked), 'Street Address' (1 Way St), 'City/State/Zip' (Chicago, IL, 60000), 'Time Zone' (Central Time), and a 'Notes' text area.

Screenshot 2: Activity Hover-over
This screenshot shows a calendar view with a red box highlighting a 'Reinspection' activity on 'Mon, Sep 17' at 12PM, labeled with a red '3'. The activity details are shown in a pop-up window.


Screenshot 3: Activity Details
This screenshot shows the 'Reinspection' activity details. The 'Claim Number' field is highlighted with a red box and labeled with a red '4'. The details include 'Date: Mon, Sep 17', 'Time: 12:35 - 01:20 (45 mins)', 'Travel: 0 mins', 'Address: 1 Way St, Chicago, IL, 60000', 'Desk Activity: Yes', and 'Claim Number: BH00000000'. The 'Notes' field is empty.

Screenshot 4: Reinspection Details
This screenshot shows the 'Reinspection' details. The 'Claim Number' field is highlighted with a red box and labeled with a red '4'. The details include 'Date: Mon, Sep 17', 'Time: 12:35 - 01:20 (45 mins)', 'Travel: 0 mins', 'Address: 1 Way St, Chicago, IL, 60000', 'Desk Activity: Yes', and 'Claim Number: BH00000000'. The 'Notes' field is empty.

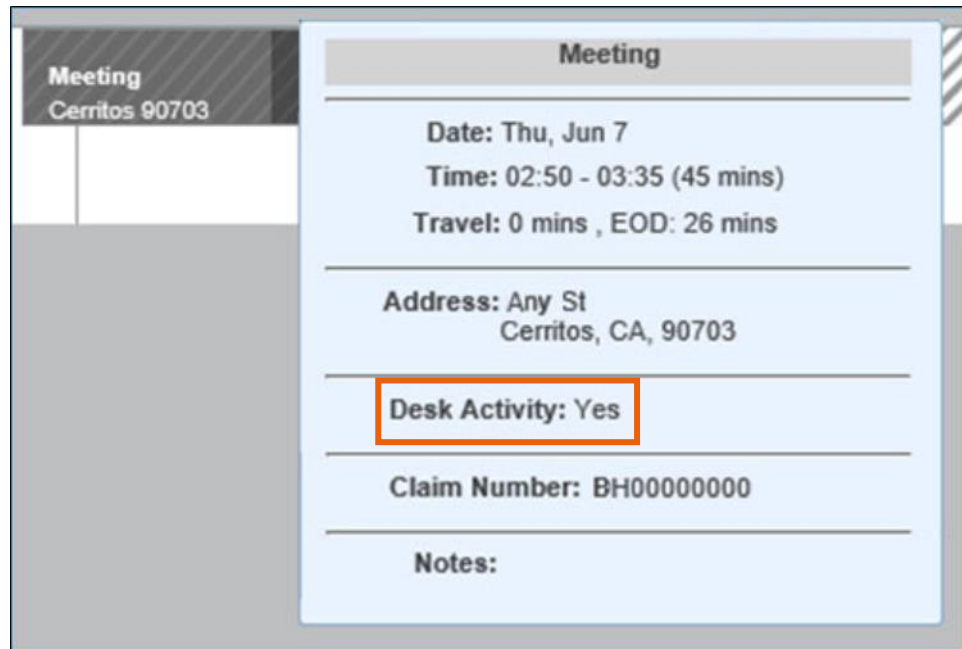
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Mobile Device Status Updates

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 (#1).



Meeting
Cerritos 90703

Meeting

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

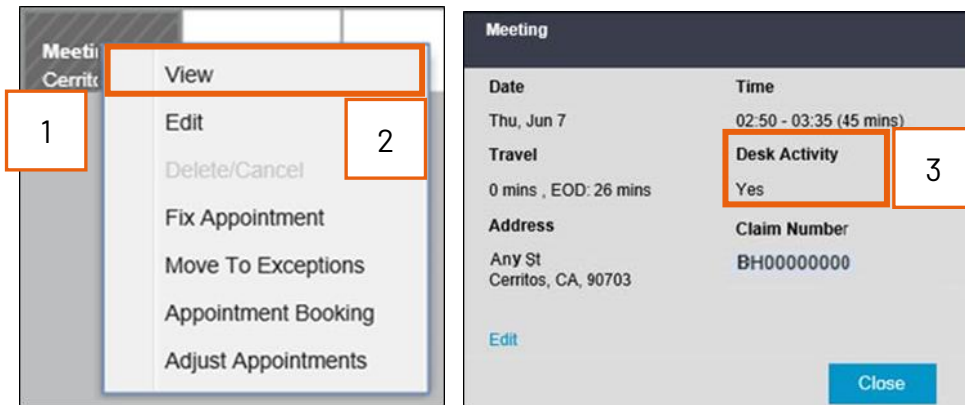
Notes:

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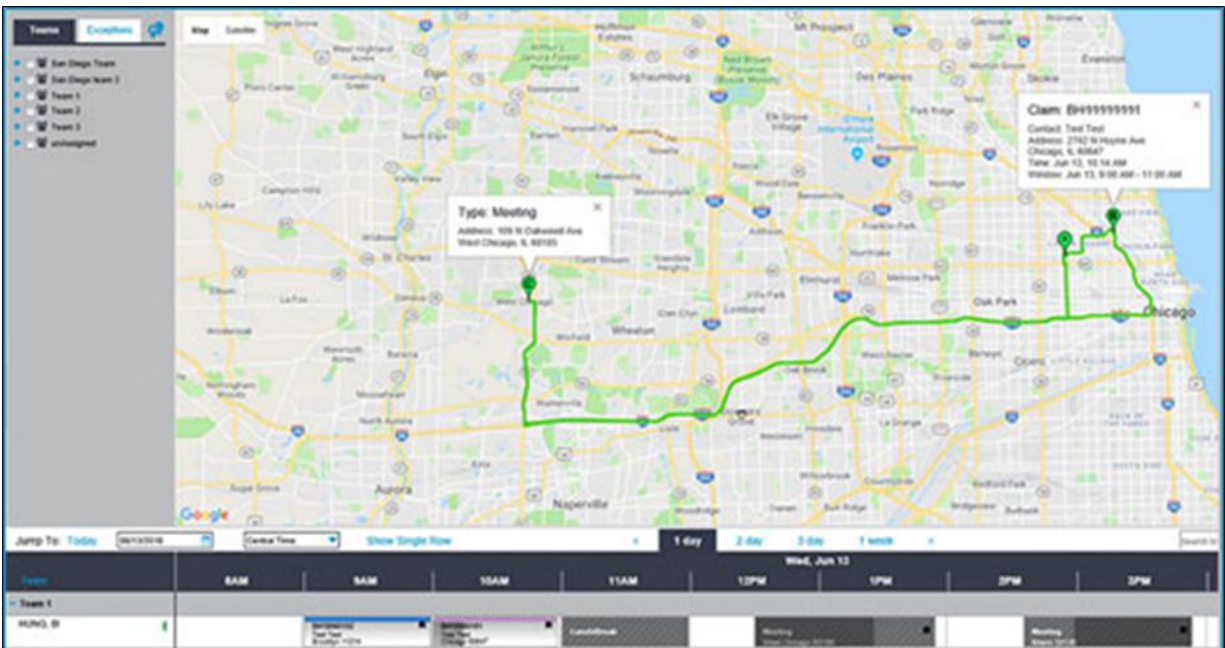
Desk Activity Displays: Yes or No

You can right-click on the **Activity** (#1) to display the Details screen. Clicking on **View** (#2) will indicate if it is a Desk Activity by displaying either Yes or No (#3):



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:

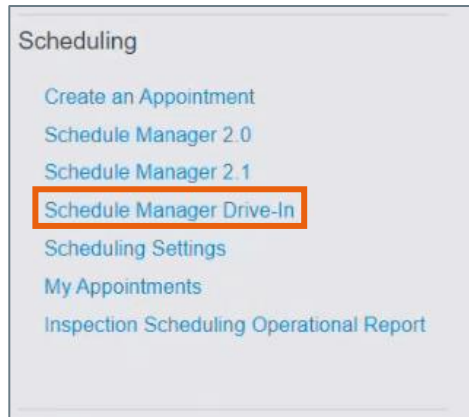


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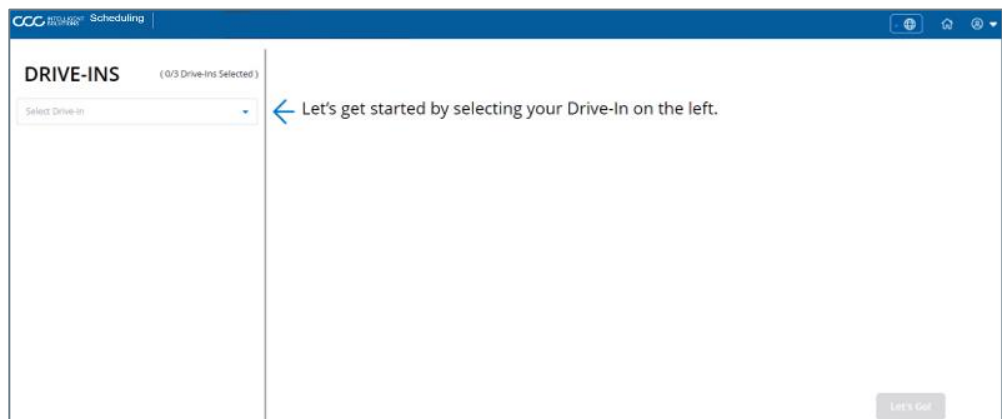
Schedule Manager – Dispatcher/ Manager, Continued

Schedule Manager Drive-In

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

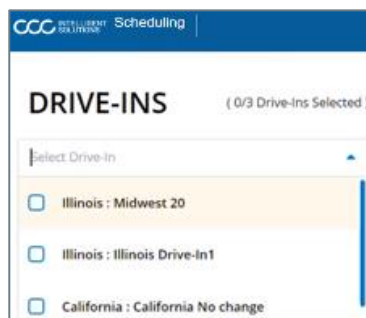


Scheduling will open.



Scheduling

The user will choose from the **drop down** list the **Drive-In** facility they prefer.

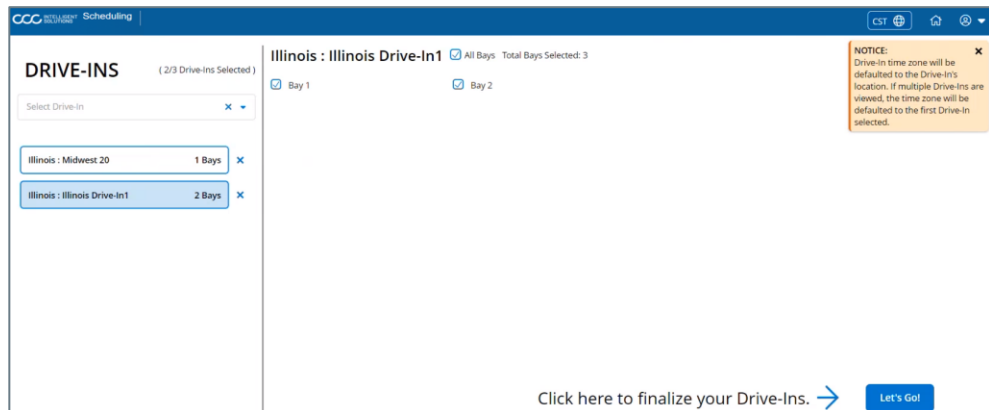


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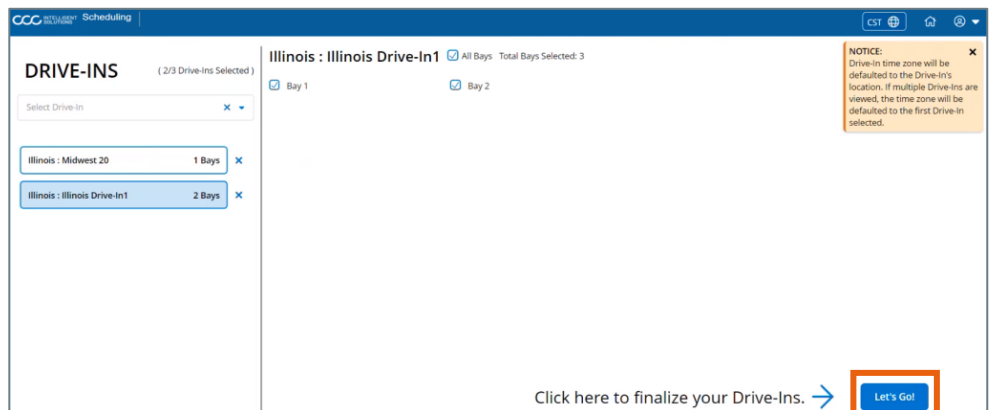
Schedule Manager – Dispatcher/ Manager, Continued

Scheduling, Continued

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

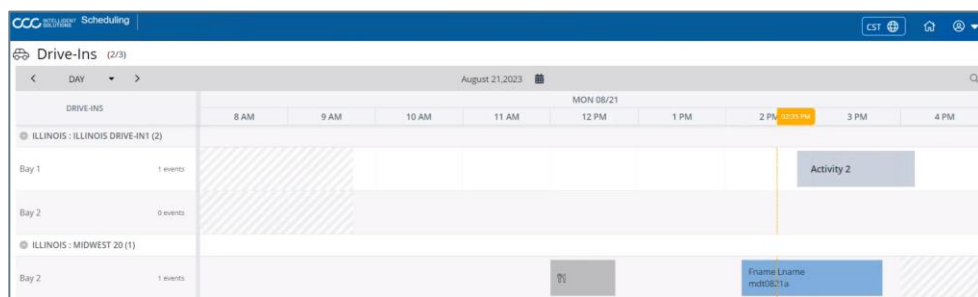


Next, the user will click **Let's Go!** at the bottom of the screen.



Appointments and Activities

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

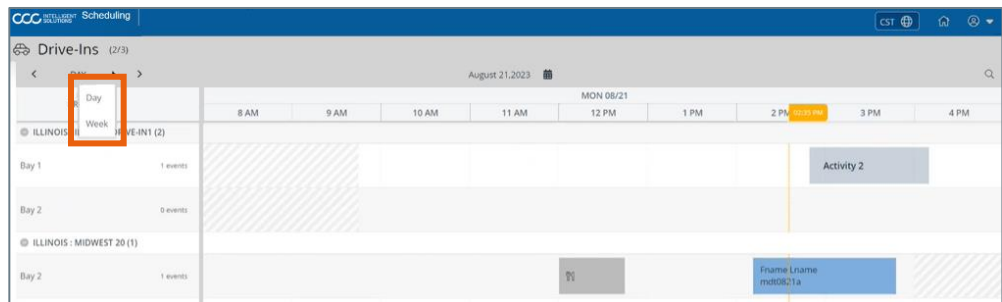


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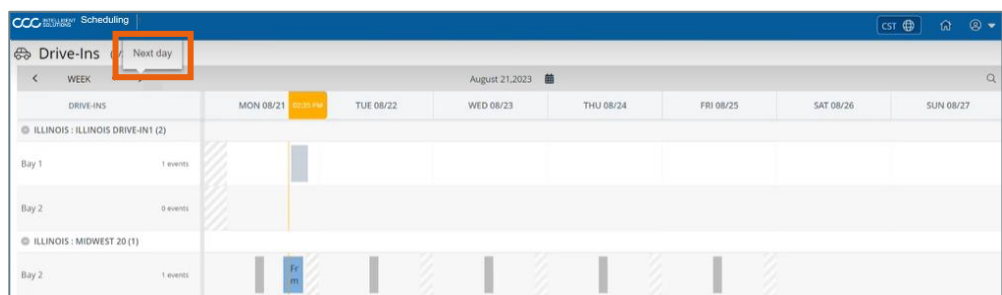
Schedule Manager – Dispatcher/ Manager, Continued

Appointments and Activities, Continued

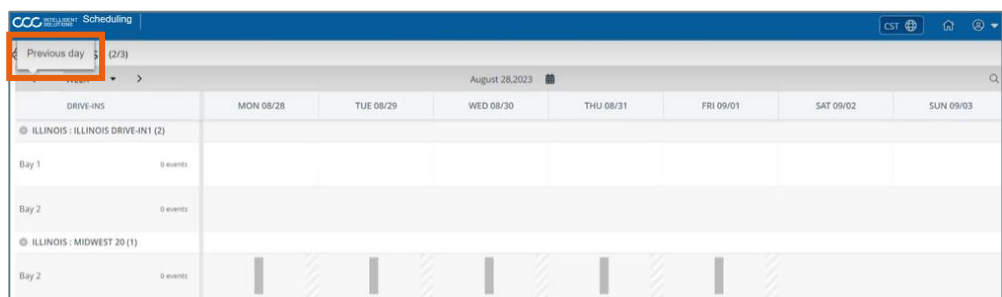
The user can change the view to a **full week**.



For consistency of tone of instructions, perhaps rephrase this to: 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.

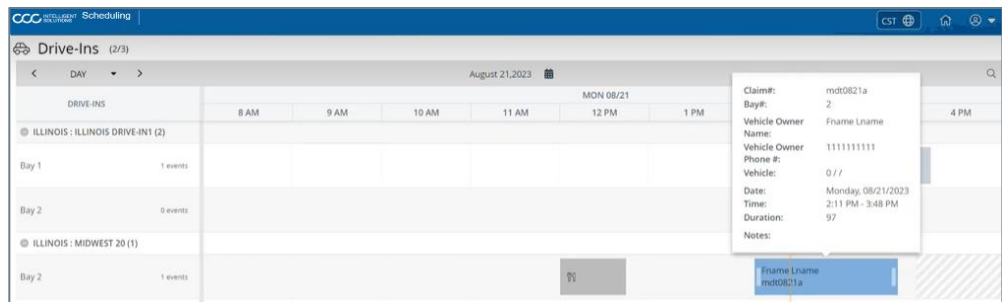


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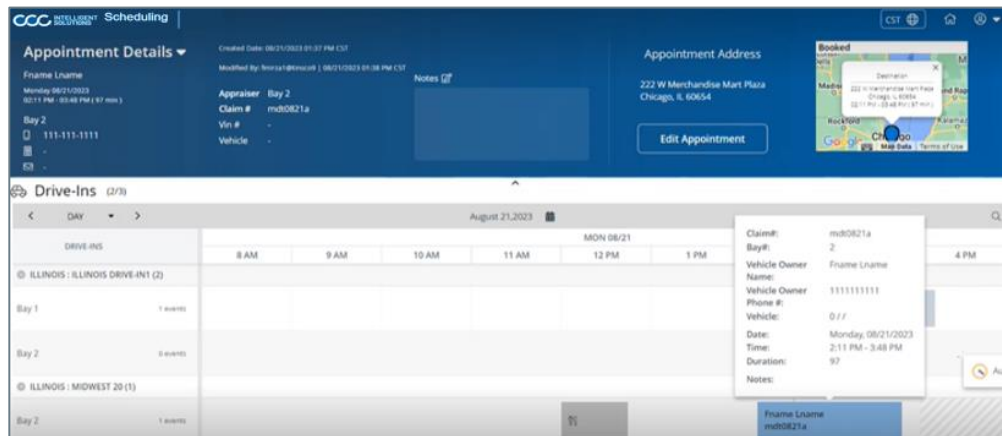
Schedule Manager – Dispatcher/ Manager, Continued

Appointments and Activities, Continued

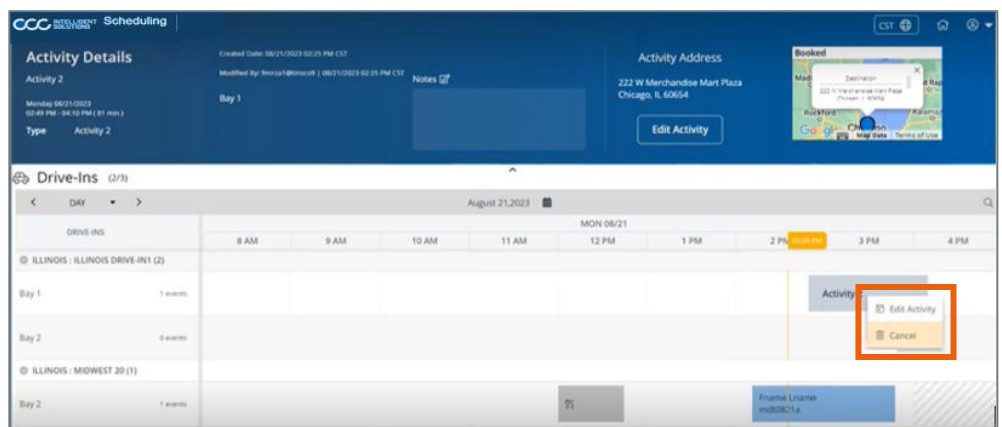
The user will click on the **appointment** that they want to see.



The **appointment details** will open.



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



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Schedule Manager – Dispatcher/ Manager, Continued

Appointments and Activities, Continued

The user can **add** new activities by clicking 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*: (empty dropdown)
- Date & Time:**
 - Start Time*: 08/21/2023, 03:14 PM
 - End Time*: 08/21/2023, 03:45 PM
 - Time Zone*: CST, with an 'All Day Activity' checkbox.
- Activity Address:** 11 Merchandise Mart Plaza, Suite 5, 60654
- Booked:** A map showing the location.

The background shows a calendar view with a table of activities:

DRIVE-INS	8 AM	9 AM
ILLINOIS - ILLINOIS DRIVE-IN1 (2)		
Bay 1	1 activity	
Bay 2	0 activity	
ILLINOIS - MIDWEST 20 (1)		
Bay 2	1 activity	