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CCC Pathways® to CCC ONE® Appraisal Platform Changes & Improvements

Overview

Introduction There are many differences and improvements between CCC Pathways® and CCC ONE® Appraisal Platform. This series of job aids identifies key areas of change as well as the differences or improvements that you should be aware of as you convert from Pathways to CCC ONE.

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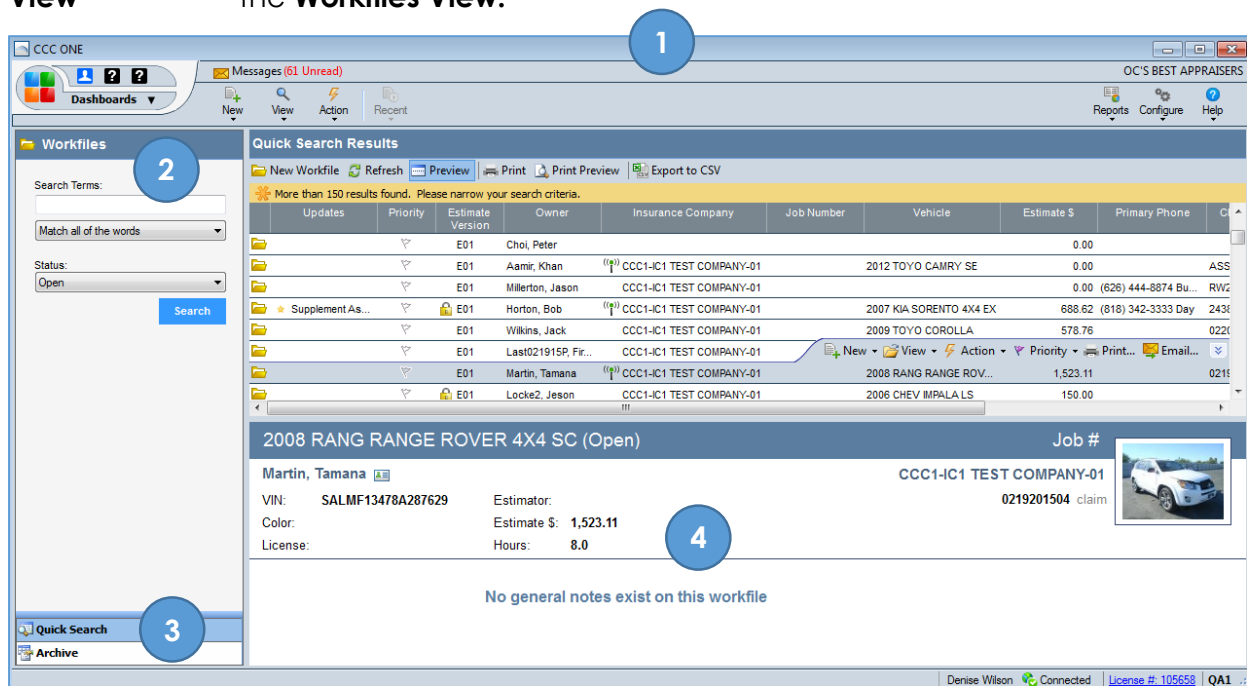
Introduction to Appraisal Platform

Introduction In CCC ONE, there are three Main Views:

- **Workfiles View:** Main Display
- **My Work Dashboard:** Message Center and Tasks
- **Configuration:** Setup, Employee Management, and Profiles

This job aid provides a brief overview of each. Later sections focus on each View in more detail.

Workfiles View In Pathways, the Main View is the **In Process screen**. In CCC ONE, it's the **Workfiles View**.



Section	Description
(1)Top Menus	Use the menu options on the left to perform common tasks quickly, work with Workfiles & Customers, and repeat most recent actions. Reports, Configuration and Help/Training on the right.
(2)Workfiles Left Panel	Provides menu options available for the Workfiles View including Search and Archive.
(3)Quick Search Results	Lists Assignments, current Workfiles and key details for each.
(4)Workfile Preview	Provides key details of the highlighted Workfile including Photo, Vehicle, Owner and Estimate data.

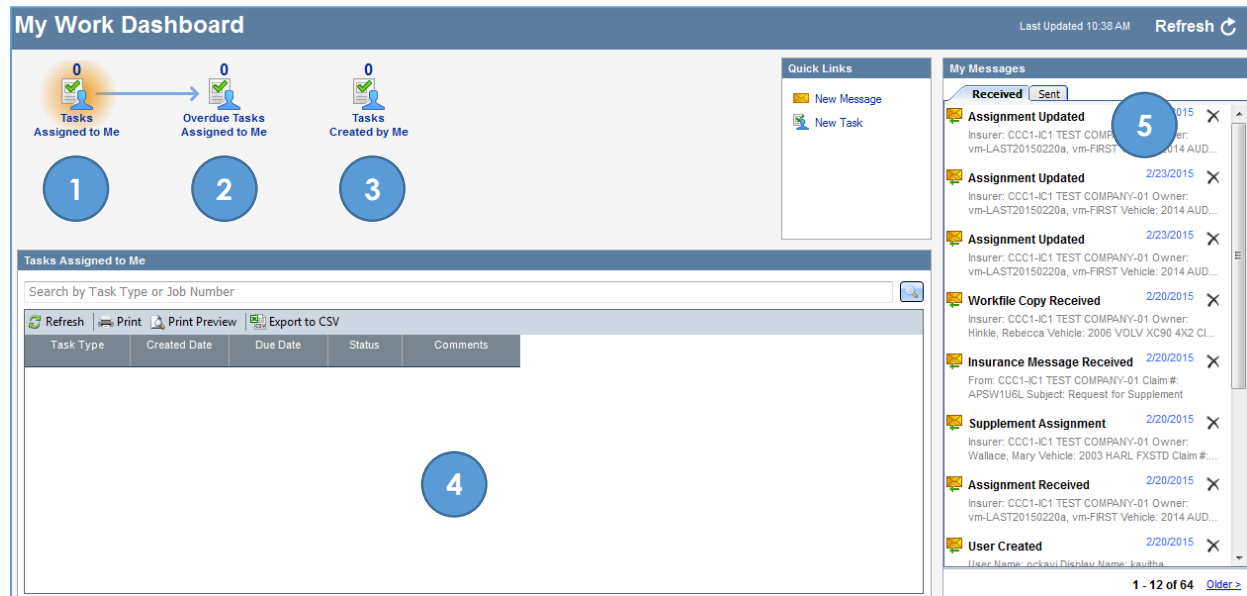
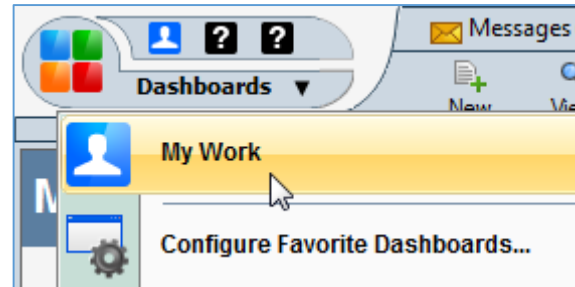
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Introduction to Appraisal Platform, Continued

My Work Dashboard

The My Work Dashboard allows you to see all tasks assigned to you as well as the Message Center.

To access, go to the upper left corner, click on **Dashboards** and select **My Work** from the drop list.



Section	Description
(1) Tasks Assigned to Me	Displays a list of the Tasks assigned to you with Due Date, Create Type, Comments and current status.
(2) Overdue Tasks Assigned to Me	Displays any Overdue Tasks that need to be resolved.
(3) Tasks Created by Me	Create your OWN tasks here and track them.
(4) Search Results Pane	When you click on a Task icon, corresponding search results and data display here.
(5) My Messages	Allows you to send and receive messages to users within your organization. Insurance Notifications are also received here. (Ex: New Assignments, Insurance Messages, and Supplement Assignments).

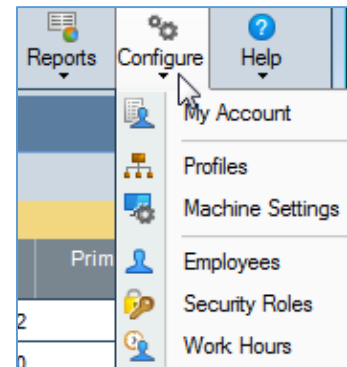
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Introduction to Appraisal Platform, Continued

Configuration In Pathways, you used the Software, Profiles and Security Modules to set up and configure the system.

In CCC ONE, the **Configure Menu** contains all of these things, just organized a bit differently.

We will take a deep dive look into the Configure Menu Items later in this document because many of these settings will be defined during the Conversion Process. In the meantime, here is a brief description of each:



Menu Item	Description
My Account	Displays your Login and Contact information. This data updates your employee profile within the system. Your name and phone number will be used to populate Workfiles and the Estimate so that you don't have to rekey it.
Profiles	Just like Pathways, the Profiles section allows you to create IA Office, Claim Office, Repair Facility, and Inspection Facility Profiles.
Machine Settings	Machine Settings allows you to view Directories and configure EMS and Import/Export settings and defaults for printing and recovery.
Employees	Displays all Employees associated with this Company. With proper permissions , you can add new Employees, edit existing employee information such as Contact information, if user is an Estimator and what security roles they should have.
Security Roles	Allows you to grant or deny permissions to users if you have the proper Security Role already set up for you. This includes for the core application as well as other Admin Rights.
Work Hours	Allows you to define Service Hours for your IA Location.

Workfiles View vs. In Process

Introduction

As with Pathways, the Workfile is the central document in CCC ONE. In addition to the normal workfile types you are used to, you will also see New Assignment Workfiles and Converted Pathways Workfiles. As before, the Workfile contains all the Owner, Insurance, Vehicle and Estimate information for the damage appraisal, including photos and attachments. This job aid provides a closer look at the Workfiles View and the Workfile itself.

Workfiles View Features

The Workfiles View has several new features that allow you to organize your work.

Right-click to add or remove non-required columns.

Create New Workfiles, refresh the list and print or export Workfile data.

Take Actions on the Workfile using the mini-toolbar or open to a specific Workfile Tab.

Email contacts directly from the mini-toolbar.

Updates	Priority	Est. Ver	Owner	Insurance Company	Job Number	Vehicle	Estimate \$	Primary Phone
		E01	GL Fir...	CCC1-IC1 TEST COMPANY-01		2007 HARL FLHP	1,159.67	
						2010 HOND GL1800	2,866.80	
						2007 BMW F650GS	2,911.24	
						2010 HOND VFR12FAA	2.91	
		E01	Last021715F, Fir...	CCC1-IC1 TEST COMPANY-01		2010		
		E01	Last021715C, Fir...			2015 BEM...	26,641.10	
		E01	Last021715B, Fir...			SS CHARGER SXT	348.75	

CCC ONE Workfile

The Workfile has the same information as the Pathways Workfile, just organized a bit differently. The top displays the Claim data and a Workfile Menu that allows you to act on the Workfile as a whole. The Workfile Tabs are also reorganized.

IA File ID is now called a Job Number. You must Convert to Job to add a Job Number.

File View Actions Help

Save Save and Close Print... Email... New... Update Rates and Rules Convert to Job Close Workfile

Job Number: Owner: Wilkins, Jack Vehicle: 2009 TOYO COROLLA License:
 Estimator: Victoria George Insurance: CCC1-IC1 TEST COMPAN... VIN: JTDBL40E299080512 Color:

Workfile - Wilkins, Jack

Contacts Insurance Inspection Vehicle Estimate Rates Attachments Settlements Total Loss Notes Events

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Workfiles View vs. In Process, Continued

Contacts Tab In Pathways, owner, Insurance and inspection information are found in the **Admin 1** and **Admin 2** tabs. Here, that information is divided into three tabs; **Contact**, **Insurance** and **Inspection**. We begin with the Contacts Tab.

Add any Contact associated with this claim.

Defaults to your Office and identifies the assigned Estimator.

Replaces "Affiliate" feature. If checked, will print IA Office info on the estimate. If unchecked, IA office info is EXCLUDED, only Insurer info prints.

Blank Required fields are Yellow.

Insurance Tab Add Insurance, Assignment, and Loss information here.

Information from the Assignment is pre-populated.

You must add the Adjuster on the Contacts Tab.

Select Motorcycle as Claim Type to write a Motorcycle Estimate.

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Workfiles View vs. In Process, Continued

Inspection Tab

Repair Site and details for the Inspection Appointment are added on this tab. You can also show if there is a rental and the Days to Repair.

Vehicle Tab

Unlike Pathways, the Vehicle Tab combines **Description** and **Damage** into one sub tab.

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Workfiles View vs. In Process, Continued

Estimate Tab Just like Pathways, the Estimate Tab is where you add Estimate lines, lock the Estimate and view Estimate Types (Prelim, Prior Damage, etc.)

Actions toolbar

If available, Advisor runs an Audit Report to identify issues BEFORE you lock the Estimate.

MOTOR Database Search and Filter tools.

Available Operations are active once a part is highlighted.

A	N	*	0	Est	Line	Oper	Description	Qty	Price	Ext. Price	Labor	Paint
					1		HOOD	0	0.00	0.00	0.0	0.0
					2	Repl	Hood Japan built (HSS)	1	345.56	345.56	1.3	2.4
					3		Add for Clear Coat	0	0.00	0.00	0.0	1.0
					4		116-Headlight (Stock)	0	0.00	0.00	0.0	1.4
					5			0	0.00	0.00	0.0	0.3

Rates Tab Just as in Pathways, the Rates Tab displays Rates selected in the Profile associated with this Workfile (Claim Office, IA, etc). Here you can adjust those rates for this particular Workfile.

Use these tabs to locate a specific Rate.

Code	Description	Locked \$	Current \$
B	Body		34.00
P	Paint		34.00
M	Mechanical		34.00
F	Frame		34.00
S	Structural		34.00
D	Diagnostic		34.00
E	Electrical		34.00
G	Glass		34.00
R	PDR		34.00
	Body Supplies		12.00
	Paint Supplies		12.00

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Workfiles View vs. In Process, Continued

Attachments Tab

The Attachments Tab replaces the Images Tab for CCC ONE. The Attachments Tab allows you to add Images and PDF files to the Workfile. Links to attachments display on the Preview Pane also.

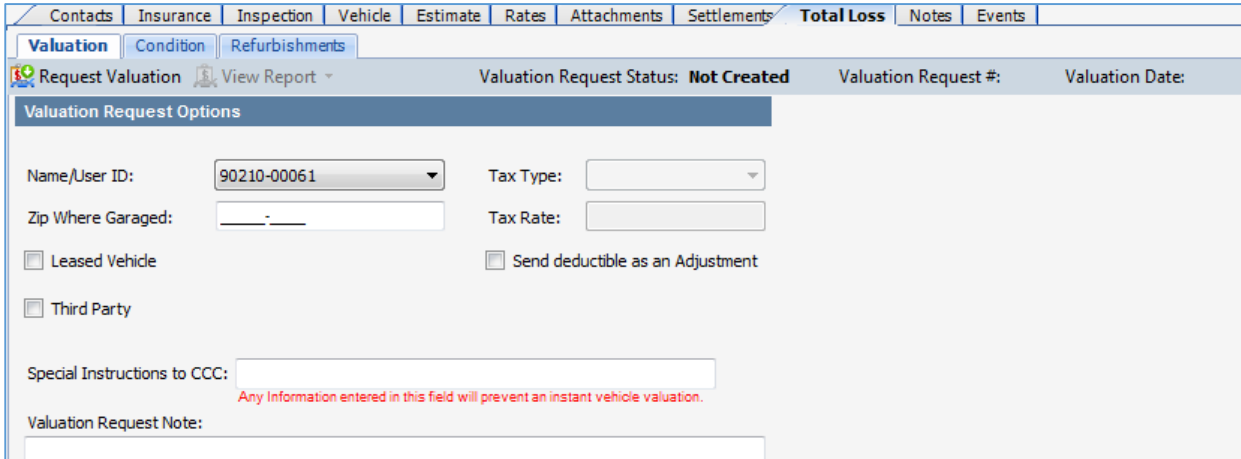
Settlements Tab

The **Summary Tab** in Pathways is now the **Settlement Tab** in CCC ONE. Estimate and Total Loss information pre-populate. The **Settlement Decision** is where the Appraiser specifies the workfile as “Repairable” or as a “Total Loss.”

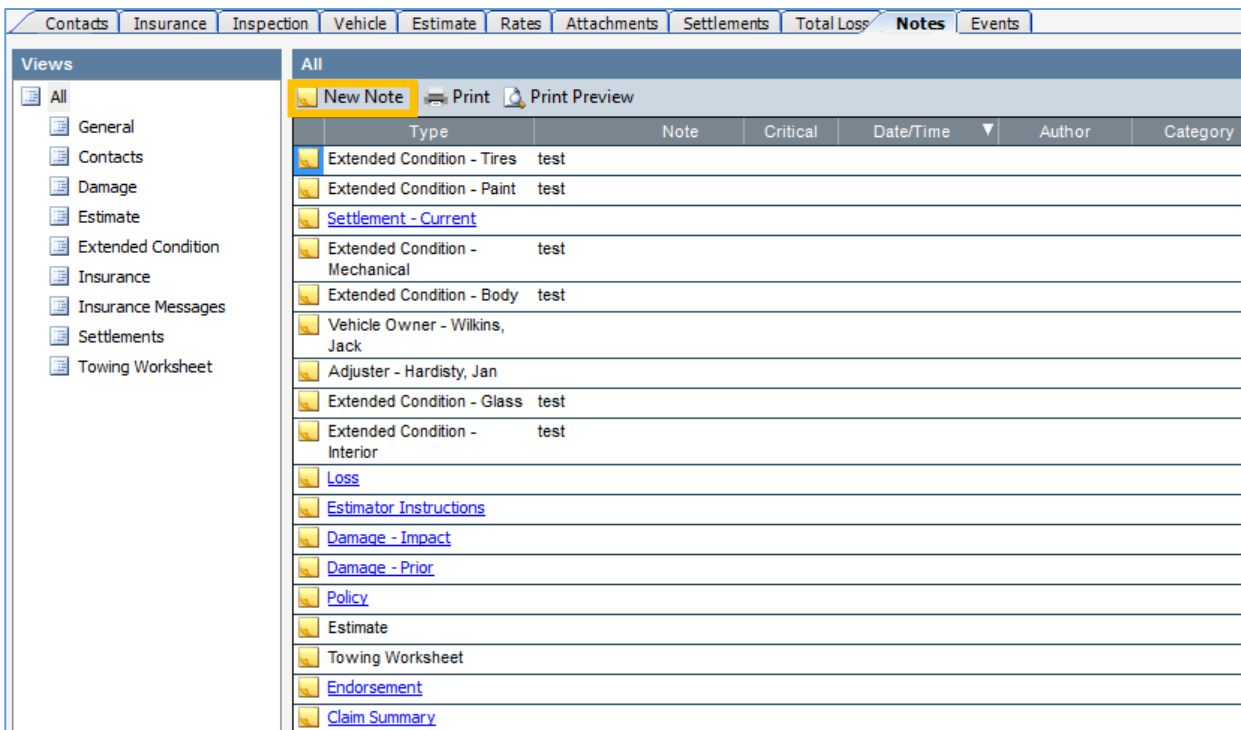
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Workfiles View vs. In Process, Continued

Total Loss Tab If available, you will also have a Total Loss Tab just as in Pathways. Here, the Valuation will be returned to this tab for review as a PDF.



Notes Tab In CCC ONE, the Notes tab also lists ALL Workfile Notes in one location, no matter where they were added. Some also link to their locations in the Workfile. You can also add new Notes.






Type	Note	Critical	Date/Time	Author	Category
Extended Condition - Tires	test				
Extended Condition - Paint	test				
Settlement - Current					
Extended Condition - Mechanical	test				
Extended Condition - Body	test				
Vehicle Owner - Wilkins, Jack					
Adjuster - Hardisty, Jan					
Extended Condition - Glass	test				
Extended Condition - Interior	test				
Loss					
Estimator Instructions					
Damage - Impact					
Damage - Prior					
Policy					
Estimate					
Towing Worksheet					
Endorsement					
Claim Summary					

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Workfiles View vs. In Process, Continued

Events Tab

Just like Pathways, the CCC ONE Workfile also has an Events Tab. Here all events are recorded, including System Generated and User Generated. You can also use the Required sub-tab to view only those that are required to submit the Estimate.

Contacts Insurance Inspection Vehicle Estimate Rates Attachments Settlements Total Loss Notes Events						
History Required						
History						
 New Event  Print  Print Preview						
Date/Time	Completed By	Event	Document Number	Comments	Event Source	
02/20/2015 08:33 AM	Jan Hardisty	Valuation response was added to the workfile.			System Generated	
02/20/2015 08:32 AM	Jan Hardisty	Valuation request submitted.			System Generated	
02/20/2015 08:30 AM	Jan Hardisty	First preliminary estimate line written.			System Generated	
02/20/2015 08:28 AM	Jan Hardisty	Workfile Created.		Workfile was created.	System Generated	

Communications Differences

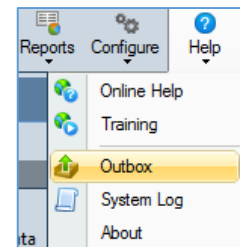
Introduction In Pathways, you had to initiate communication to both send Estimates and receive Assignments, as well as selecting what to upload. Messages also were downloaded to the Inbox. Things work a bit differently in CCC ONE. This job aid describes the changes and how to handle Communications in CCC ONE.

No Inbox All items come directly into the Workfiles View automatically, including library retrievals, assignments, etc. Messages and Tasks are accessed by clicking on the Messages or Tasks link in the upper left corner of the Main View.



The Messages and Tasks display on the **My Work Dashboard** and are discussed in more detail in that section.

Outbox CCC ONE still has an Outbox but is it used a bit differently. The Outbox is located under **the Help Menu** because you will use it to see if a transaction or Workfile has failed to send or is Suspended.



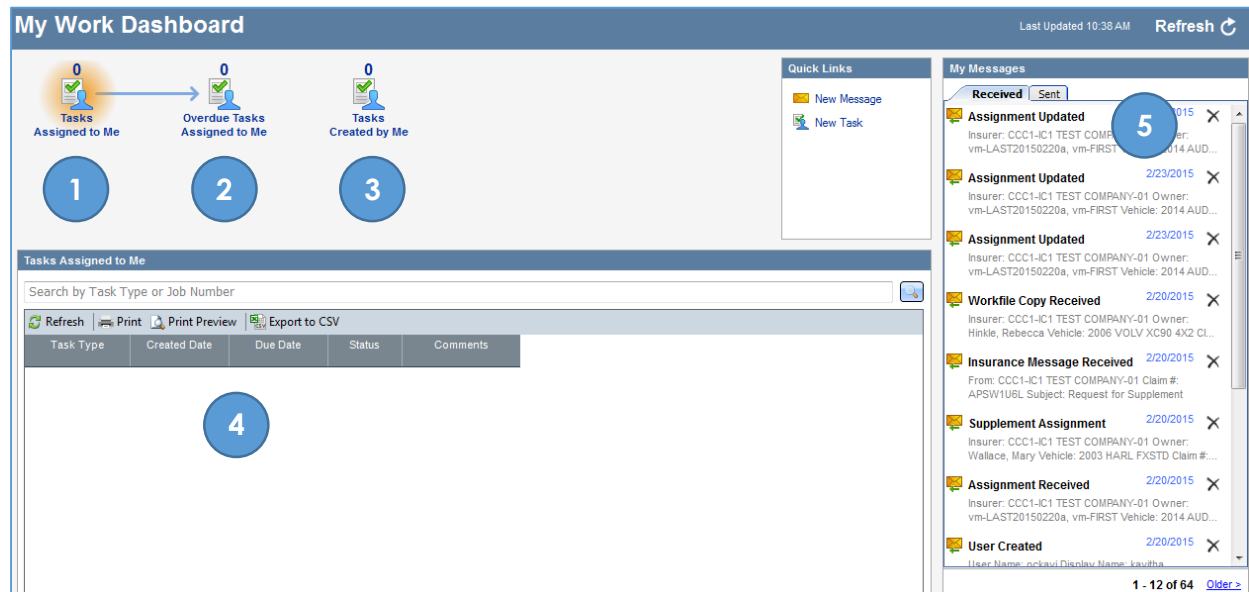
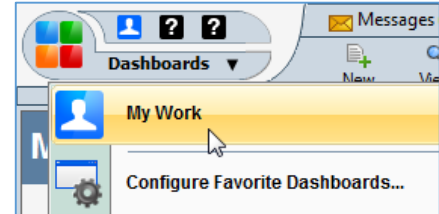
If so, you can resend it as needed. You can also see what has been successfully Sent.



My Work Dashboard

Introduction A new feature in CCC ONE is the My Work Dashboard. This job aid describes how it works and why it's useful.

My Work Dashboard As mentioned previously, to access, go to the upper left corner of the Main View, click on **Dashboards** and select **My Work** from the drop list.



Section	Description
(1) Tasks Assigned to Me	Displays a list of the Tasks assigned to you with Due Date, Create Type, Comments and current status.
(2) Overdue Tasks Assigned to Me	Displays any Overdue Tasks that need to be resolved.
(3) Tasks Created by Me	Create your OWN tasks here and track them.
(4) Search Results Pane	When you click on a Task icon, corresponding search results and data display here.
(5) My Messages	Allows you to send and receive messages to users within your organization. Insurance Notifications are also received here. (Ex: New Assignments, Insurance Messages, and Supplement Assignments).

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My Work Dashboard, Continued

Message Center

When you receive a new Assignment, an Updated Assignment, or other Message, you will see a **Notification** in the bottom lower right of your screen telling you there is a new Message.

Assignment Received ✕

Insurer: CCC1-IC1 TEST COMPANY-01
 Owner: vm-LAST20150224a, vm-FIRST
 Vehicle: 2014 DODG DART GT
 Claim #: vm20150224a

Go to **My Work Dashboard** (or click on **Messages**) to see all of your messages both received and sent.

Double click on a Message to open it. Notice the link to the Workfile?

Message

Assignment Updated

Print Print Preview

02/23/2015 06:52 PM

From: CCC1-IC1 TEST COMPANY-01
 Owner: vm-LAST20150220a, vm-FIRST
 Claim: vm-20150220a [View Workfile](#)
 Vehicle: 2014 AUDI A8 QUATTRO
 Appt: 2/23/2015 10:10 AM

Assignment updated by the insurance company.

OK

My Messages

Received Sent

- Assignment Updated**
2/23/2015 ✕

Insurer: CCC1-IC1 TEST COMPANY-01 Owner: vm-LAST20150220a, vm-FIRST Vehicle: 2014 AUD...
- Assignment Updated**
2/23/2015 ✕

Insurer: CCC1-IC1 TEST COMPANY-01 Owner: vm-LAST20150220a, vm-FIRST Vehicle: 2014 AUD...
- Assignment Updated**
2/23/2015 ✕

Insurer: CCC1-IC1 TEST COMPANY-01 Owner: vm-LAST20150220a, vm-FIRST Vehicle: 2014 AUD...
- Workfile Copy Received**
2/20/2015 ✕

Insurer: CCC1-IC1 TEST COMPANY-01 Owner: Hinkle, Rebecca Vehicle: 2006 VOLV XC90 4X2 CL...
- Insurance Message Received**
2/20/2015 ✕

From: CCC1-IC1 TEST COMPANY-01 Claim #: APSW1U6L Subject: Request for Supplement
- Supplement Assignment**
2/20/2015 ✕

Insurer: CCC1-IC1 TEST COMPANY-01 Owner: Wallace, Mary Vehicle: 2003 HARL FXSTD Claim #:...
- Assignment Received**
2/20/2015 ✕

Insurer: CCC1-IC1 TEST COMPANY-01 Owner: vm-LAST20150220a, vm-FIRST Vehicle: 2014 AUD...
- User Created**
2/20/2015 ✕

User Name: nckavi Display Name: kavitha

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Remember! You do NOT have to initiate communications like in Pathways. It happens automatically!

Profile Management Differences

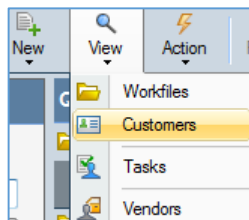
Introduction There are several changes to Profiles in CCC ONE that you should be aware of when converting from Pathways. This job aid describes the key changes and additions.

Profile Screen Go to **Configure** and select **Profiles**. The following screen displays:

Section	Description
(1) Search for Profiles	Enter full or part name and/or select Profile Type, then click Search to locate a specific profile.
(2) Toolbar	Allows you to create New Profiles and Import Profiles to make the process faster.
(3) Current Profile List	Highlight a profile the mini-toolbar to edit, copy data or copy entire profile into another Profile.

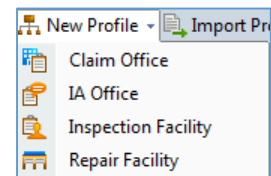
Profile Types In CCC ONE, there are the following Profile Types:

- **IA Company:** If a Multi-Store Operator
- **IA Location**
- **IA Office**
- **Insurance Claim Office**
- **Repair Facility**
- **Inspection Facility** (for Drive-Ins)



Contract Customer Profile

information is now located in the Customer Database. There is also no longer a **Miscellaneous Profile** nor a **Salvage Yard/Pool**. They will not be converted to CCC ONE.

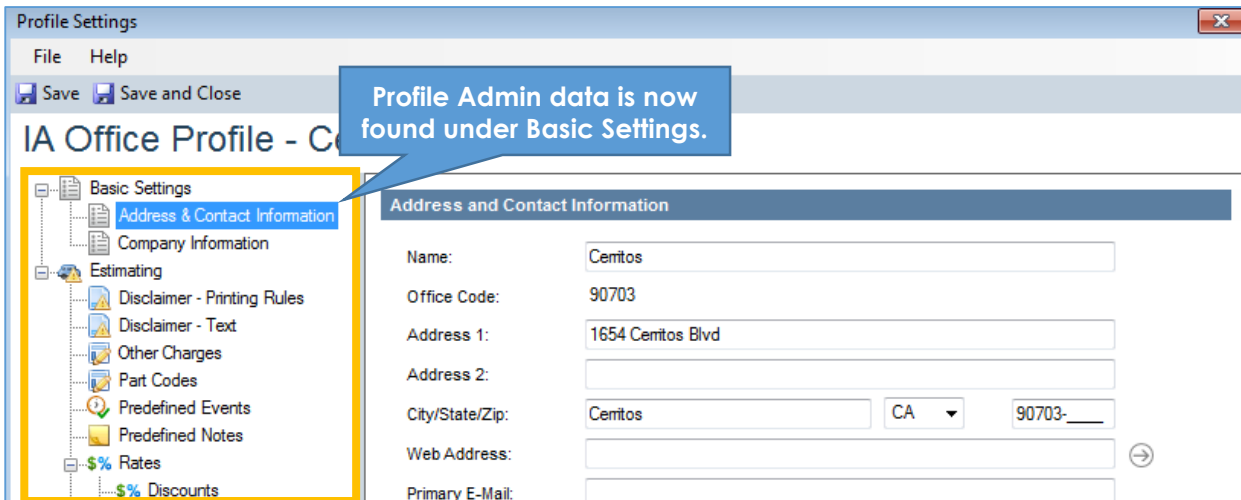


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Profile Management Differences, Continued

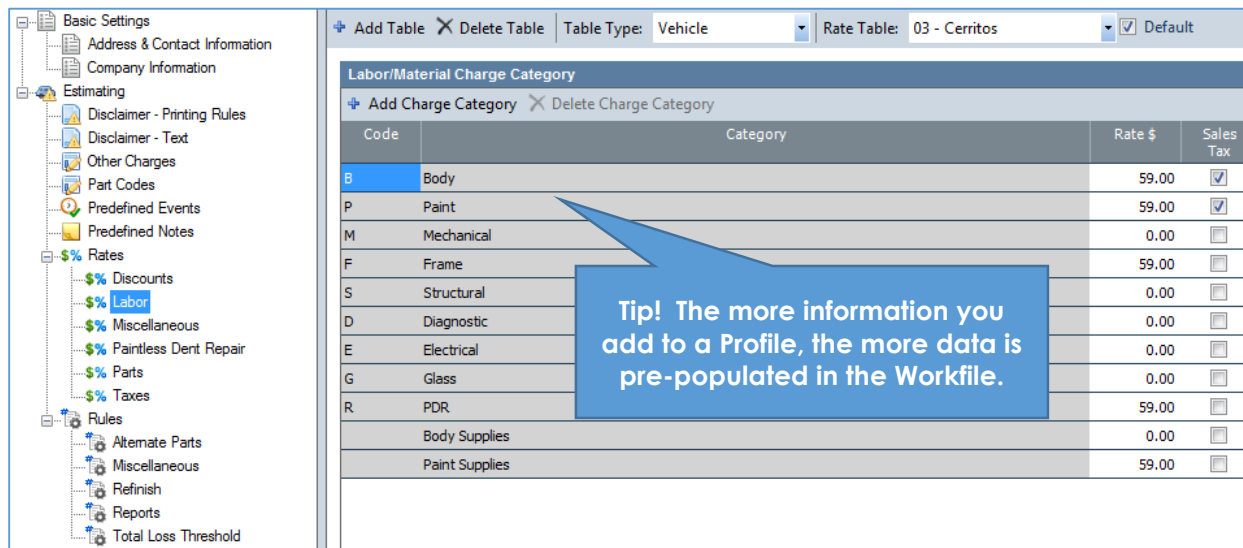
Profile View

Regardless of which Profile Type you are working with, the Profile displays with a **hierarchical menu structure** on the left, and fields to complete and/or options to select on the right. This allows you to easily access desired rates or rules to update or change as needed.



Hierarchical Menu

All Profile types have the menu on the left. Some Profile Types may have fewer items. Profiles have the same information they did in Pathways, just organized a bit differently.

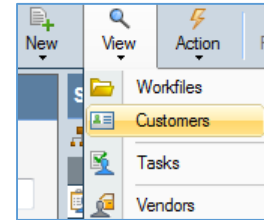


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Profile Management Differences, Continued

Contract Customers

As mentioned earlier, the Contract Customer Profile no longer exists. Instead, during conversion to CCC ONE, that information was imported into the **Customer** database.



To access your customer information, go to **View**, then click on **Customers**.

When creating a new workfile, you can add the Customer from this database on the Contacts Tab. The Rate table for the Customer will be applied automatically.

Last Name	First Name	Company	Primary Phone	Email	Address 1	City	State	Created Date
C	P							2/11/2015
Chan	Angela		(123) 123-1234 Day					1/29/2015
Chan- offline	Angela							2/04/2015
Falger	Ross	(123) 123-1234 x3 Business						1/29/2015
First020915K	Last020915K							2/09/2015
Fun	Tom		(123) 123-1234 Day					2/10/2015
Genson	Thomas							2/09/2015
Glenn	Sharron							1/28/2015
Glenn no ins	Sharron							
Glow	Vita							2/03/2015
Gupta	Tanisha							2/05/2015
Hamilton	Scott							2/03/2015
husan	reddu							2/03/2015
Jain	Sheetal							2/09/2015
Jones	Brandon							1/30/2015
K	Kshipra							1/26/2015
Kane	Rachel							2/09/2015

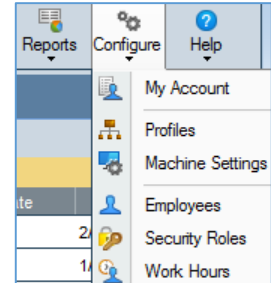
You can **edit** a contact, **merge two contacts** that were created for the same person or **delete** a contact from the list.

FYI: Rates from the **Contract Customer Profile** were added to the IA Location Profile, then associated with the Customer record created during conversion from CCC Pathways.

Configuration Differences

Introduction

Many of the features and functionality that existed in the Software and Security Modules in Pathways are now located under the **Configuration Menu**. Many of these settings or features were set up or configured during the conversion process from Pathways to CCC ONE. However, it is important to understand where they are now located.

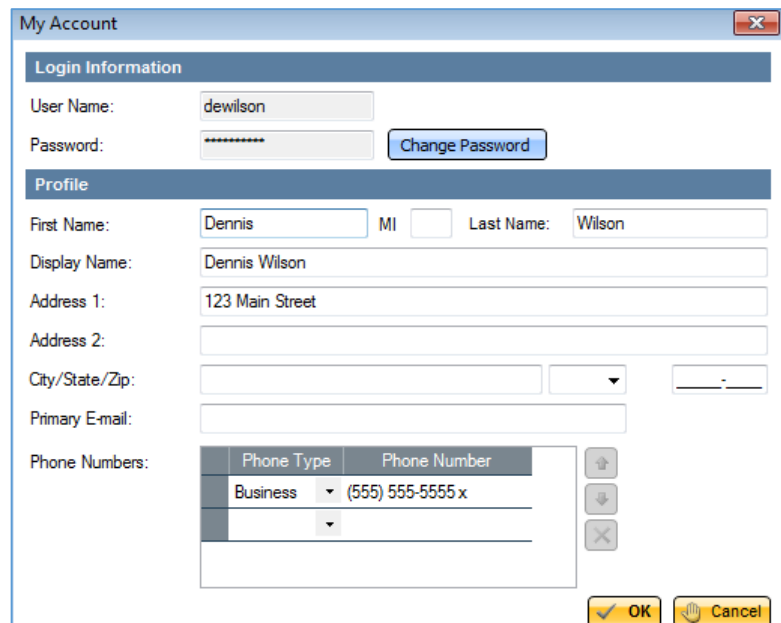


This job aid describes each item under the Configuration Menu except for Profiles. *Please see the job aid entitled "Profile Management Differences" for changes to Profiles.*

My Account

The My Account feature allows you to update your account information as needed.

Make sure to keep name and phone number accurate as it will be used by the system as needed in the Workfile.



Phone Type	Phone Number
Business	(555) 555-5555 x

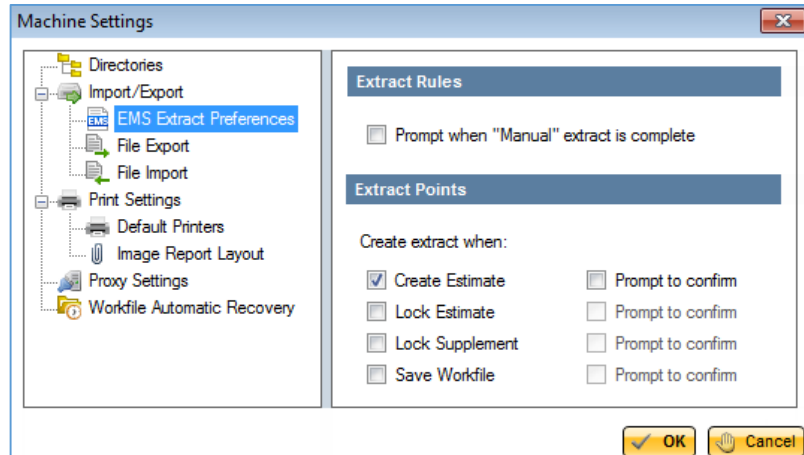
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Configuration Differences, Continued

Machine Settings

The Machine Settings are where you can set up your **EMS** and **File Import/Export preferences**.

This is also where you select default printers and image layout for Reports, that is, how many photos print on a page.



Employees

If you have the permission, the Employee section allows you to add new Employees to the system and update existing ones. Once you click **New Employee** or select an employee to edit, there are two tabs: Employee and User.

Employee Tab

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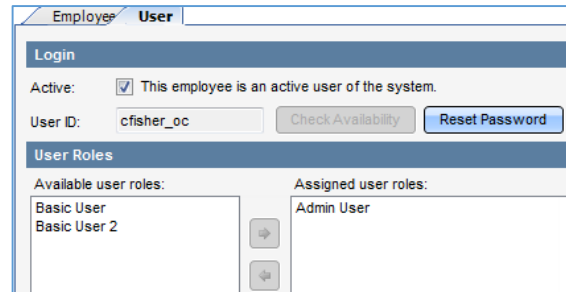
Configuration Differences, Continued

Employees, continued

User Tab

The User tab allows you to create User IDs for employees that you want to have an login for CCC ONE.

A user MUST be assigned at least one Role in order to use CCC ONE. Here is also where you can reset the password on this Employee's account.



Security Roles

Security Roles allows you to grant or deny permissions to users. These include user permissions for Core, Reporting, and Estimating. The employee must be an active user of the system.

