APD Estimating Dashboard

Introduction   This job aid discusses the functionality of the **APD Estimating Dashboard**. This dashboard provides an overview of the Key Performance Indicators (KPIs) for your Company compared to your configured Peers and Industry groups for a selected period-over-period.
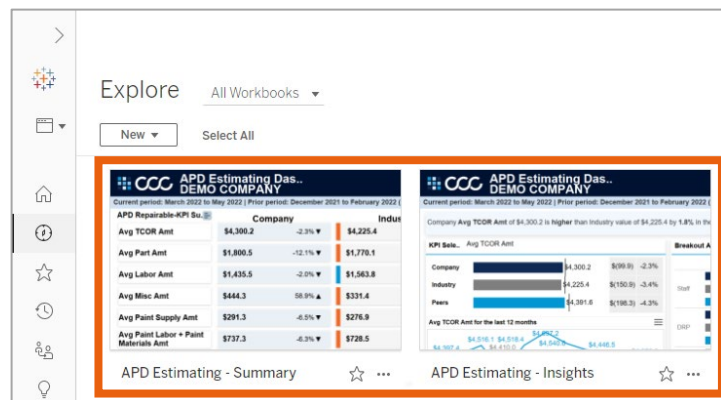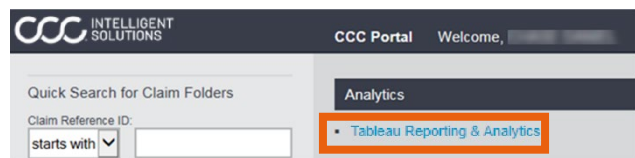
This dashboard provides the following views:

- **APD Estimating – Summary**
- **APD Estimating – Insights**

Note: APD (Auto Physical Damage).

Access APD Dashboards

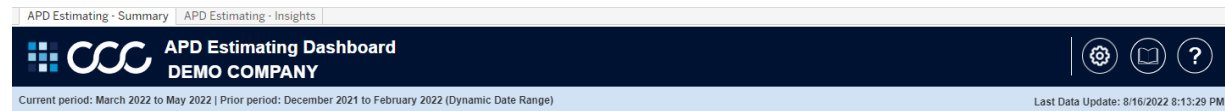| Step	Description
1	Enter your **User ID** and **Password** to login to the CCC® Portal.
2	Click the **Tableau Reporting & Analytics** link in the Analytics section of the CCC Portal home page. A new Analytics window opens.
3	Click **Explore** on the left side panel.
4	Select **All Workbooks** from the dropdown.
5	Select the **APD Estimating – Summary** or **APD Estimating – Insights**.

APD Estimating Dashboard, Continued

Dashboard Filters

APD Estimating · Summary   APD Estimating · Insights

CCC APD Estimating Dashboard
DEMO COMPANY

Current period: March 2022 to May 2022 | Prior period: December 2021 to February 2022 (Dynamic Date Range)   Last Data Update: 8/16/2022 8:13:29 PM

- Select the tabs to switch between the **Summary** and **Insights** dashboard views.
- Displays the **Current/Prior period** and the **Period Setting** selected from the Gear icon.
- The **Last Data Update** indicates the last date and time the data was refreshed in the dashboard.
- Select the **Book** icon to view the glossary.
- Select the Question Mark icon to enable a help overlay for dashboard tips.

Gear Icon
Note: Gear icon settings vary depending on the dashboard tab selected.

Stage	Description
1	Use the **Period Settings** drop-down to use either the **Fixed Date Range** or the **Dynamic Date Range**.
2	In the **Fixed Period Settings** section select/enter the **From** and **To** dates for the Current Period and Prior Period. **Note:** Dates will appear in a Month/Year format. Selecting any day in the month will automatically include the full month in the period.
3	In the **Dynamic Period Settings** section enter or use the slider to select number of months to display for the **Rolling Months** and **Months Aging** periods. In the Prior Period drop-down select **vs Prior Year** or **vs Prior Period**. **Month Rolling**: Sets the dynamic period range for example 3 means 3 months rolling period. **Month Aging:** Set the dynamic period skipped month to allow for data to mature, 2 months aging will skip prior 2 months *(recommended aging period)*. **Prior Period:** Select the prior period comparison for the Dynamic Range. When set to Prior Year: The prior period will be set to same months as current period from prior year. When set to Prior Period then the prior rolling period will be used. *For example, if 3 Rolling Months and 2 Months Aging was selected and today is **July 20th, 2022,** the current period would be **February 2022** to **April 2022**. June and May would be the Aged Months, and July would not count because the month is not completed. The prior year would be February 2021 to April 2022 or the prior period would be November 2021 to January 2022.*
4	Use the **Advanced Settings** drop-down to set the Company Comparison to **Industry** or **Peers** for the Quick Note. **Note:** This option is only available in the **Insights dashboard**.

APD Estimating - Summary

APD Estimating – Insights

Continued on next page

APD Estimating Dashboard, Continued

Dashboard Filters, continued

Filters

Note: Click **Apply** to set the changes to the selection made. All filters except for **Comparison** are available as Breakouts Attributes on the APD Estimating – Insights dashboard.

Stage	Description
1	**Comparison** drop-down select **Industry** or **Industry – Normalized**.
2	**Repairable Condition** drop-down select **All**, **Repairable,** and/or **Total Loss**.
3	**Appraiser Type** drop-down select **All**, **DRP**, **IA**, **OS**, **Staff**, and/or **Unknown**.
4	**Method of Inspection** drop-down select one or multiple inspection types.
5	**Drivable Flag** drop-down select **All**, **Drivable** and/or **Non-Drivable**.
6	**Loss Category** drop-down select **All**, **Collision**, **Comprehensive**, **Liability**, and/or **Unknown Loss Category**.
7	**Vehicle Type** drop-down select one or multiple vehicle types.
8	**Vehicle Source** drop-down select **All**, **Asian**, **Domestic**, **European**, and/or **Unknown Source**.
9	**Vehicle Age Group** drop-down select one or multiple vehicle age range groups.
10	**Vehicle Owner State** drop-down select one or multiple vehicle owner states.
11	**Inspection Location State** drop-down select one or multiple inspection location states.
12	**Severity Range** drop-down select one or multiple vehicle damage dollar ranges.
13	**Primary Impact** drop-down select one or multiple primary impacts locations.

Comparison
Industry ▼
Repairable Condition
Repairable ▼
Appraiser Type
(All) ▼
Method Of Inspection
(All) ▼
Driveable Flag
(All) ▼
Loss Category
(All) ▼
Vehicle Type
(All) ▼
Vehicle Source
(All) ▼
Vehicle Age Group
(All) ▼
Vehicle Owner State
(All) ▼
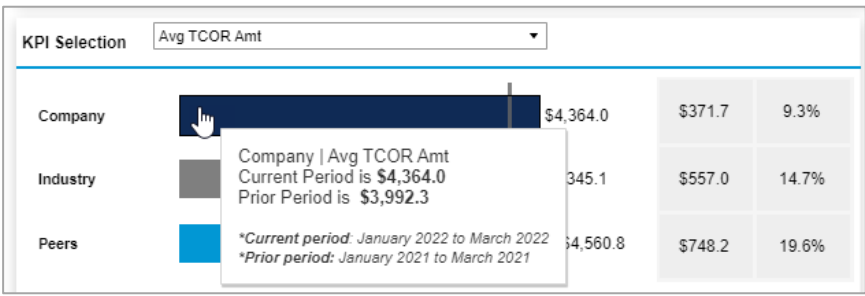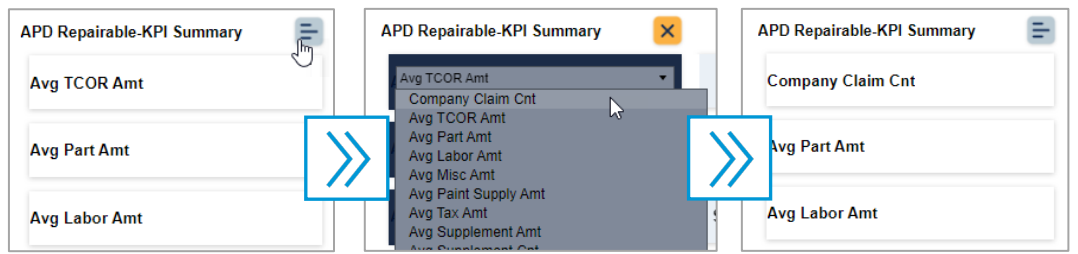Inspection Location State
(All) ▼
Severity Range
(All) ▼
Primary Impact Point
(All) ▼

Dashboard Navigation

Stage	Description
1	Hover over dashboard elements to view additional details.
2	The color indicator determines if your company is: A. **Blue:** More competitive than your Peer/Industry. • Hover to view the percentage your company is more competitive by. B. **Orange:** Less competitive than your Peer/Industry. • Hover to view the percentage your company is less competitive by.
3	Select the **menu** icon for the **APD Repairable-KPI Summary** to change the KPI displayed in the dashboard from a list of available options in the drop-down.

APD Estimating Dashboard, Continued

APD Estimating - Summary Dashboard

The **APD Estimating - Summary Dashboard** gives and overview of several selectable KPIs and how they compare to your configured Peers and Industry.
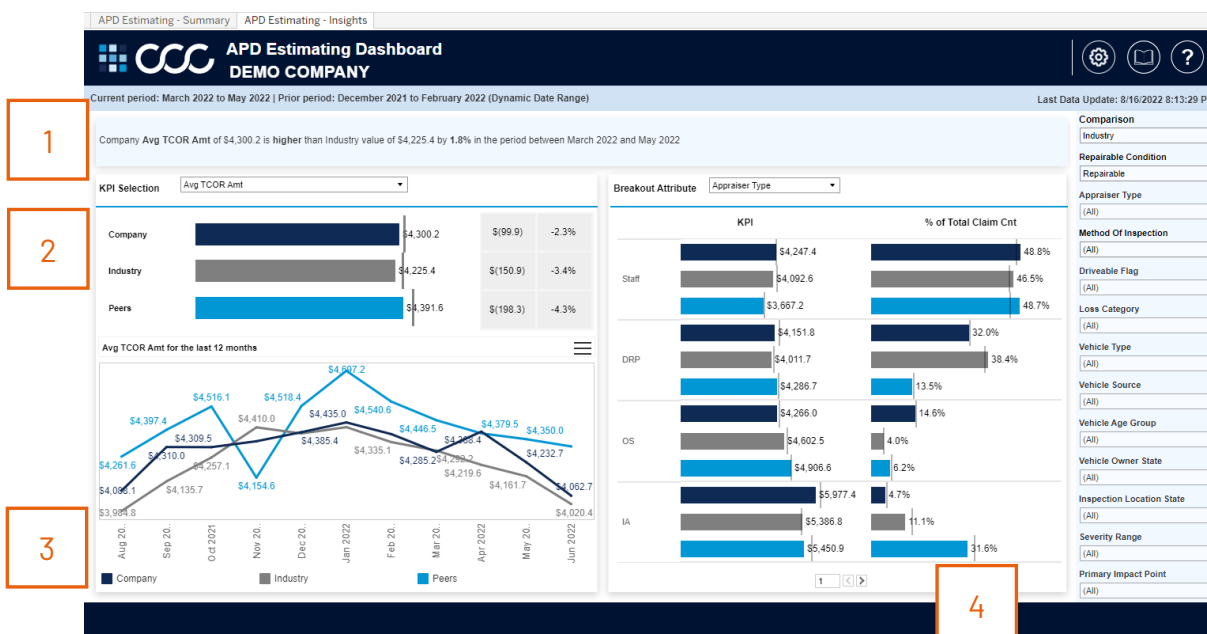
Stage	Description
1	The **APD Reparable – KPI Summary** section allows you to view the selected KPIs to compare against your Peers and Industry.
2	The **Company** column displays your company's current period's KPI. The arrows and percentage display a period–over–period trend for your company's KPI.
3	The **Peers** column displays your configured peer's current period's KPI, hover to view the percentage your peer is more/less competitive. The arrows and percentage display a period–over–period trend for your peer's KPI.
4	The **Industry** column displays your configured industry's current period's KPI, hover to view the percentage your industry is more/less competitive. The arrows and percentage display a period–over–period trend for your industry's KPI.

APD Estimating Dashboard, Continued

APD Estimating – Insights Dashboard

The **APD Estimating - Insights Dashboard** gives you further insight into a selected KPI.

Stage	Description
1	Displays the selected KPIs Company and Peer/Industry totals and the percentage change for comparison for the selected time period. **Note:** Select the **Gear** icon then use the drop-down in the **Advanced Settings** to set the comparison to Peer or Industry.
2	Use the **KPI Selection** drop-down to select a KPI to populate the dashboard. The totals appear for each group, with the bar representing the **current period**, and the line representing the **prior period**. Then the **first** column displays difference from the prior period in absolute numbers (ex: percentage, dollar amount, days, hours, etc.). The **second** column displays the difference in percentage from the prior period.
3	Displays the selected KIPs trend graph over time for Company, Peer, and Industry. Select the **menu icon** to edit the **Months to Show** and **Rolling Months** in the graph. The rolling months will show the rolling sum is the total amount from the past rolling months period selected.
4	Use the **Breakout Attribute** drop-down to select an attribute to display the attributes corresponding categories in the charts below. Each attribute will have a column for **KPI** and **% of Total Claim Count** which will correspond to the attribute's category, these also display the current/prior period totals. **Note:** Use the arrows to navigate between categories if available.