

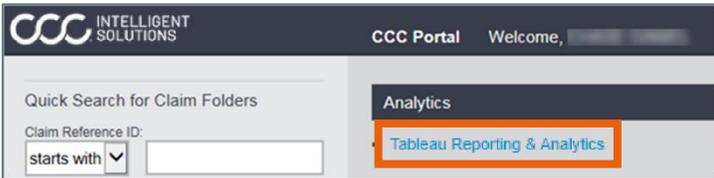
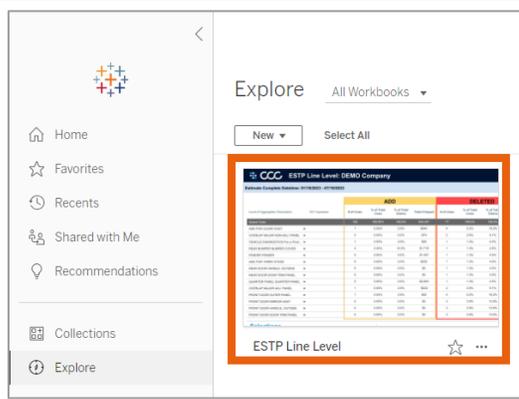
ESTP Line Level Dashboard

Introduction

The **ESTP Line Level** dashboard assists insurance customers in understanding Estimate Appraisers' actions. It provides visualizations, analytics, and actionable insights, including:

- Analyzing appraiser utilization of the ESTP tool.
- Tracking changes from Preliminary Estimate to First Estimate.
- Observing changes over time.
- Identifying lines changed through ESTP.
- Highlighting areas for threshold configuration changes.
- Evaluating Appraiser performance.
- Exporting Claim Level information.
- Summarizing Appraisers' changes.

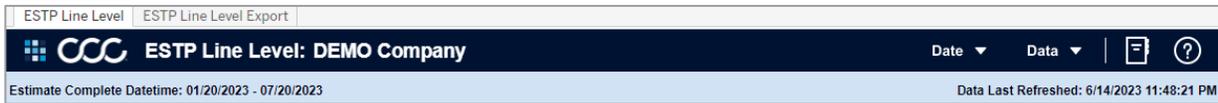
Access ESTP Line Level Dashboard

Step	Description
1	Enter your User ID and Password to login to the CCC® Portal.
2	Select the Tableau Reporting & Analytics link in the Analytics section of the CCC® Portal home page. A new Analytics window opens. 
3	Select Explore on the left-side panel.
4	Select All Workbooks from the drop-down.
5	Select the ESTP Line Level Dashboard. 

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ESTP Line Level Dashboard, Continued

Dashboard Filters



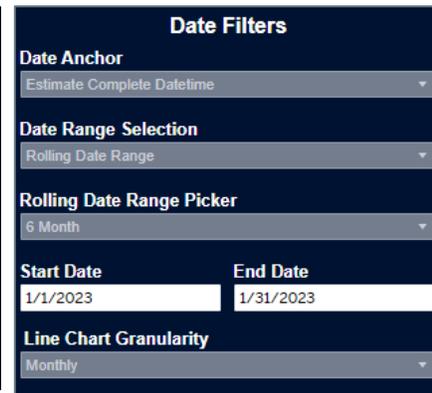
Select the **ESTP Line Level** and **ESTP Line Level Export** tabs to switch between dashboard views.

Book and **Question Mark** icons:

- Select the **Question Mark** icon to enable a help overlay for dashboard tips. Select the **Book** icon to open the dashboard glossary.
- **Estimate Complete Datetime:** Displays the **Start/End** date selected from the Date filter.
- **Date Last Refreshed:** Displays the **Date/Time** the data was last refreshed.

Date Filters

Stage	Description
1	Date Anchor: Select an anchor date option from the available list of choices.
2	Date Range Selection: Select either Rolling or Fixed Date Range .
3	Rolling Date Range Picker: Select a rolling date range of 3, 6, 12, or 24 months.
4	Start Date/ End Date: Select or enter a Start and End Date , if Fixed the Date Range Selection is chosen.
5	Line Chart Granularity: Select a granularity for the Action of Time chart of: Daily, Weekly, or Monthly .



Data Filter

Note: Select **Apply** to confirm any changes.

Stage	Description
1	E01 Appraiser Name: The Appraiser that completed the First Estimate of Record.
2	P01 Vehicle Location: The Location of the vehicle used when writing the P01. A P01 is a Preliminary Estimate generated by ESTP.
3	Auto Approval Flag: Select the Auto Approval Flag from the list to include (1) or exclude (0) auto-approved lines.
4	Predicted vs Not Predicted: Select to filter by line items that AI predicted, and lines AI did not predict, giving insight into what can be predicted.
5	Labor Operations: Select an operation or multiple from the drop-down menu.
6	Post Authoring Score: Select a percentage increment or multiple from the drop-down, based on the post authoring score, which is a value used to make decisions on the routing of a claim through different workflow channels.



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ESTP Line Level Dashboard, Continued

Dashboard Navigation

Stage	Description
1	Toggle to switch between Level of Aggregation and E01 Appraiser to analyze user performance first and then which parts versus the other way around.
2	If the user selects a given line, it expands to show the appraisers responsible for the changes to that line.
3	Hover over dashboard elements to view additional details such as number of lines changed in the Change Summary section.
4	Select a Level of Aggregation and/or an individual Appraiser to change how the dashboard's data and graphs are displayed. Hint: Press Control + click to select individual appraisers.
5	Hover over the Control Panel icons to view additional details about the filters. <div data-bbox="868 730 1393 856" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Action: Change KPI to Rank By: # of Lines lines selected: 985</p> <p>These parameters define how the data is ranked which is used to determine the values in the filter portion of the control panel.</p> </div>
6	Use the toggle to change between Action over Time and Change Variance charts. <div data-bbox="950 871 1393 1102" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Change Variance</p> </div>

ESTP Line Level | ESTP Line Level Export
CCC ESTP DEMO Company
Date | Data | ?

Estimate Complete Datetime: 04/23 | Data Last Refreshed: 10/10/2023 9:12:45 PM

Level of Aggregation	ADD				DELETED				CHANGED				ACCEPTED			
	# of Lines Added	% of Total Lines Added	% of Total Claims Added	Total Financial Impact	# of Lines Deleted	% of Total Lines Deleted	% of Total Claims Deleted	Total Financial Impact	# of Lines Changed	% of Total Lines Changed	% of Total Claims Changed	Total Financial Impact	# of Lines Accepted	% of Total Lines Accepted	% of Total Claims Accepted	Total Financial Impact
Grand Total	242	100.00%	100.0%	\$30,630	87	100.0%	100.0%	\$6,262	283	100.0%	100.0%	\$6,207	431	100.0%	100.0%	\$0
ADD FOR CLEAR COAT	5	2.07%	11.8%	\$215	0	0.0%	0.0%	\$0	5	1.8%	9.3%	\$37	12	2.8%	12.7%	\$0
Appraiser 869	3	1.24%	8.8%	\$183	1	1.1%	4.5%	\$38	15	5.3%	20.0%	\$58	30	7.0%	33.3%	\$0
Appraiser 2479	1	0.41%	2.0%	\$28	3	3.4%	9.1%	\$289	10	3.5%	11.6%	\$84	5	1.2%	4.8%	\$0
Appraiser 1706	0	0.00%	0.0%	\$0	0	0.0%	0.0%	\$0	7	2.5%	11.6%	\$25	3	0.7%	3.2%	\$0
OVERLAP MAJOR ADJ. PAN.	7	2.89%	14.7%	-\$130	2	2.3%	0.1%	-\$36	12	4.2%	20.9%	-\$10	6	1.4%	14.3%	\$0
FENDER FENDER	4	1.65%	11.8%	\$201	1	1.1%	1.1%	\$0	0	0.0%	0.0%	\$0	1	0.2%	1.0%	\$0
Appraiser 869	2	0.83%	5.9%	\$110	1	1.1%	1.1%	\$0	1	0.4%	2.3%	-\$1	1	0.2%	1.0%	\$0
Appraiser 1796	1	0.41%	2.9%	\$73	1	1.1%	1.1%	\$0	1	0.4%	2.3%	\$0	1	0.2%	1.0%	\$0
Appraiser 2479	0	0.00%	0.0%	\$0	0	0.0%	0.0%	\$0	3	1.1%	7.0%	\$30	1	0.2%	1.0%	\$0
OVERLAP MAJOR ADJ. PAN.	6	2.48%	11.8%	-\$230	1	1.1%	1.1%	-\$38	7	2.5%	9.3%	-\$14	6	1.4%	9.5%	\$0
FRONT LAMPS HEADLAMP A.	6	2.48%	17.6%	\$1,693	1	1.1%	4.0%	\$16	7	2.5%	19.3%	\$540	3	0.7%	4.8%	\$0
ADD FOR THREE STAGE	6	2.48%	5.9%	\$723	0	0.0%	0.0%	\$0	4	1.4%	4.7%	-\$74	2	0.5%	3.2%	\$0
TINT COLOR	4	1.65%	11.8%	\$161	0	0.0%	0.0%	\$0	0	0.0%	0.0%	\$0	0	0.0%	0.0%	\$0
FENDER FENDER	4	1.65%	8.8%	\$570	1	1.1%	4.5%	\$262	14	4.9%	32.6%	\$67	6	1.4%	6.3%	\$0

Selections

- All Lines
- Multiple Appraisers

Control Panel

Action: Add | KPI to Rank By: # of Lines | lines selected: 91

Min # of Lines: 0 | % of total lines: 8.72%

Top/Bottom: Top | Method: # | # of Records: 10,000

Apply

Change Summary

Paint Labor Rate
25 lines changed out of 42 (59.52%)

Paint Labor Rate | Paint or Body Supply Amount | Labor Rate | Actual Paint Labor Hrs | Actual Labor Hrs

Action over Time

75.0% | 51.9% | 35.2% | 7.4% | 5.6% | 16.7% | 8.3%

Accepted | Added | Changed | Deleted

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ESTP Line Level Dashboard, Continued

ESTP Line Level Dashboard

The screenshot displays the ESTP Line Level Dashboard for DEMO Company. Key features include:

- Level of Aggregation Table:** A large table with columns for ADD, DELETED, CHANGED, and ACCEPTED. Each column has sub-columns for # of Lines, % of Total Lines, % of Total Claims, and Total Financial Impact. A 'Grand Total' row is at the top.
- Control Panel:** Located on the left, it includes:
 - Action:** A dropdown menu set to 'All Lines'.
 - KPI to Rank By:** A dropdown menu set to '# of Lines'.
 - Min # of Lines:** A text input field set to '0'.
 - Top/Bottom Method:** A dropdown menu set to 'Top'.
 - # of Records:** A dropdown menu set to '10,000'.
- Change Summary:** A bar chart showing the distribution of changes across different categories like Labor Rate, Paint Labor Rate, etc.
- Action over Time:** A line chart showing the percentage of lines in different states (Accepted, Added, Changed, Deleted) over time.

Stage	Description																														
1	Enter an input in the Level of Aggregation or E01 Appraiser fields.																														
2	This section provides a crostab of all lines and the ability to view the # of Lines Added, Deleted, Changed, and Accepted for the selection. If the user selects a given line, it expands to show the appraisers responsible for the changes to that line. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table border="1"> <thead> <tr> <th>OVERLAP MAJOR NON-ADJ. PANEL</th> <th>Appraiser</th> <th># of Lines</th> <th>% of Total Lines</th> <th>% of Total Claims</th> <th>Total Financial Impact</th> </tr> </thead> <tbody> <tr> <td></td> <td>Appraiser 1064</td> <td>2</td> <td>1.05%</td> <td>2.5%</td> <td>-\$50</td> </tr> <tr> <td></td> <td>Appraiser 801</td> <td>0</td> <td>0.00%</td> <td>0.0%</td> <td>\$0</td> </tr> <tr> <td></td> <td>Appraiser 371</td> <td>0</td> <td>0.00%</td> <td>0.0%</td> <td>-\$42</td> </tr> <tr> <td></td> <td>Appraiser 1</td> <td>0</td> <td>0.00%</td> <td>0.0%</td> <td>-\$17</td> </tr> </tbody> </table> </div>	OVERLAP MAJOR NON-ADJ. PANEL	Appraiser	# of Lines	% of Total Lines	% of Total Claims	Total Financial Impact		Appraiser 1064	2	1.05%	2.5%	-\$50		Appraiser 801	0	0.00%	0.0%	\$0		Appraiser 371	0	0.00%	0.0%	-\$42		Appraiser 1	0	0.00%	0.0%	-\$17
OVERLAP MAJOR NON-ADJ. PANEL	Appraiser	# of Lines	% of Total Lines	% of Total Claims	Total Financial Impact																										
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	Appraiser 1	0	0.00%	0.0%	-\$17																										
3	The Selections section highlights what the user has selected in the crostab above which is then applied to both the Change Summary and Action over Time views. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>FRONT DOOR DOOR TRIM PANEL</p> <ul style="list-style-type: none"> Appraiser 801 Appraiser 371 Appraiser 1064 Appraiser 1 <p>Selections - FRONT DOOR DOOR TRIM PANEL - Appraiser 371</p> </div>																														
4	The Control Panel section has the following filters to change the data displayed in the crostab and graphs: <ul style="list-style-type: none"> • Action: From the drop-down, select a value of Add, Delete, Change, Accepted, or All to define which action the filters will apply to. • KPI to Rank By: From the drop-down, select a KPI of # of Lines, # of Claims, % of Total Lines, Avg Financial Impact, or Lines per Claims to use in combination with the Action to further filter the data. • Min # of Lines: Enter the number of line frequency needed to be visible in the dashboard. For example, if the user wants the bottom 10 records but only wants to look at lines where there are a minimum of 50 changes, then they can set this value to 50 to hide anything with 1-49 entries. 																														

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ESTP Line Level Dashboard, Continued

ESTP Line Level Dashboard, continued



Stage	Description
3	<p>The Control Panel section has the following filters to change the data displayed in the crosstab and graphs:</p> <ul style="list-style-type: none"> • Top/Bottom: Select Top or Bottom from the drop-down to display the top or bottom number of rows. • Method: Select # (number) or % (percentage) to view the top or bottom records by number or percent. The method selected will change whether the # of Record or % of Record is displayed. • Records: <ul style="list-style-type: none"> – # of Records: Enter the Number of records to display based on top/bottom selection. – % of Records: Enter the Percentage of records to display based on top/bottom selection. • Apply: Select the Apply button when Method is set to %. This button allows the user to apply the changes and view in the dashboard. • The lines selected and % of total lines display the totals for the data displayed in the dashboard. The % of total lines is based on all lines in the given time period if no filters were applied.
4	<p>The Change Summary section shows the individual(s) lines that are changing. For example, if the front bumper is being changed, this section lists the labor hours, labor operation, etc.</p>
5	<ul style="list-style-type: none"> • The Action over Time section displays the % of total lines that are Added, Accepted, Changed, and Deleted over time. • The Change Variance section gives additional insight to quantify the changes. For example, whether users are changing the labor hours by .5 hours or 3 hours on average.

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ESTP Line Level Dashboard, Continued

ESTP Line Level Export

The screenshot shows the 'ESTP Line Level Export' dashboard for 'DEMO Company'. It features a table with columns: Claim Number, Level of Aggregation Description, E01 Appraiser Name, Line Action - Summary, First Estimate Complete Datetime, and Total Financial Impact. The table lists items for Claim 23, Claim 145, and Claim 151. A 'Populate Crosstab' control is visible in the top right, with a '01' callout box around the 'Yes' radio button. Another '02' callout box highlights a row in the table for Claim 145.

Claim Number	Level of Aggregation Description	E01 Appraiser Name	Line Action - Summary	First Estimate Complete Datetime	Total Financial Impact	
Claim 23	ADD FOR CLEAR COAT	Appraiser 1	Added	5/2/2023 3:04:28 PM	\$45	
	ADD FOR FOG LAMPS	Appraiser 1	Added	5/2/2023 3:04:28 PM	\$22	
	FENDER BRACKET	Appraiser 1	Added	5/2/2023 3:04:28 PM	\$60	
	FENDER FLARE	Appraiser 1	Added	5/2/2023 3:04:28 PM	\$4	
				Changed	5/2/2023 3:04:28 PM	\$228
	FRONT BUMPER APPLIQUE	Appraiser 1	Added	5/2/2023 3:04:28 PM	\$0	
	FRONT BUMPER BUMPER COVER	Appraiser 1	Changed	5/2/2023 3:04:28 PM	\$326	
Claim 145	HAZARDOUS WASTE	Appraiser 1	Added	5/2/2023 3:04:28 PM	\$5	
	O/H FRONT BUMPER	Appraiser 1	Added	4:28 PM	\$83	
	ADD FOR CLEAR COAT	Appraiser 1	Accepted	4:55 AM	\$0	
	FLEX ADDITIVE	Appraiser 1	Accepted	4:55 AM	\$0	
	FRONT BUMPER BUMPER COVER	Appraiser 1	Changed	4:55 AM	\$201	
	FRONT BUMPER CAP	Appraiser 1	Changed	4:55 AM	\$17	
	FRONT BUMPER O/H BUMPER ASSY	Appraiser 1	Accepted	5/4/2023 11:49:55 AM	\$0	
Claim 151	HAZARDOUS WASTE	Appraiser 1	Accepted	5/4/2023 11:49:55 AM	\$0	
	ADD FOR CLEAR COAT	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0	
	ADD FOR FOG LAMPS	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0	
	ADD FOR PARK SENSOR	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0	
	FLEX ADDITIVE	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0	
	FRONT BUMPER BUMPER	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0	
	FRONT BUMPER LOWER GRILLE	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0	
GRILLE GRILLE	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0		
HAZARDOUS WASTE	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0		
O/H FRONT BUMPER	Appraiser 1	Accepted	5/12/2023 2:08:42 PM	\$0		

Stage	Description
1	Select Yes in the Populate Crosstab section to display the claim level detail. Note: It's recommended to switch the crosstab back to No if navigating back to the ESTP Line Level tab to prevent data from being loaded each time you select a new level of aggregation or E01 Appraiser.
2	The crosstab view provides users with claim number, the part altered, E01 appraiser, the type of change and the total financial impact of the change.
3	The exclamation icon indicates that the ESTP Line Level Export may experience performance problems due to the number of rows selected in the data. 
4	To download data from the crosstab: A. Select the Download button within the Tableau toolbar. B. Choose the Crosstab export option. C. Select the desired sheet from the Download Crosstab popup. D. Then select Download to complete the export.

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