

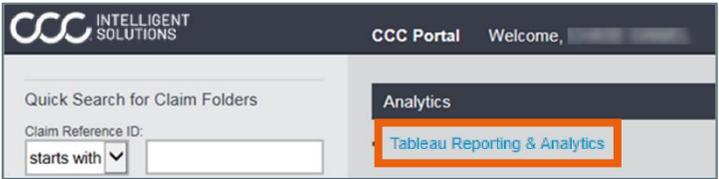
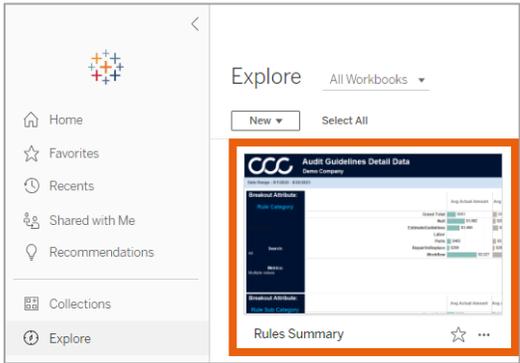
Audit Guidelines Detail Data Dashboard

Introduction The **Audit Guidelines Detail Data Dashboard** lets you dive into your client specific rules and spot the exceptions popping up on their files. It also shows why those exceptions occurred and how much extra savings could be possible on those items.

This dashboard allows you to:

- View exceptions by rules and rule category.
- Explore exceptions for different types of client configured rules.
- Identify various exceptions on file.
- Compare performance against exceptions by officer appraiser.

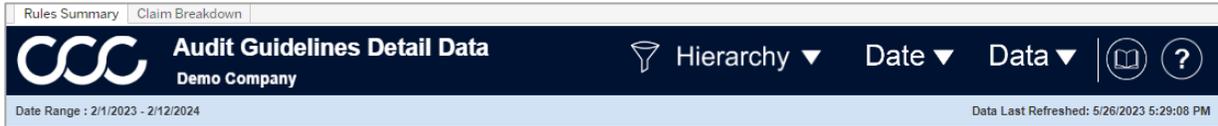
Access Audit Guidelines Detail Data Dashboard

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 Rules Summary Dashboard. 

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Audit Guidelines Detail Data Dashboard, Continued

Dashboard Filters



Select the **Rules Summary** and **Claim Breakdown** tabs to switch between dashboard views.

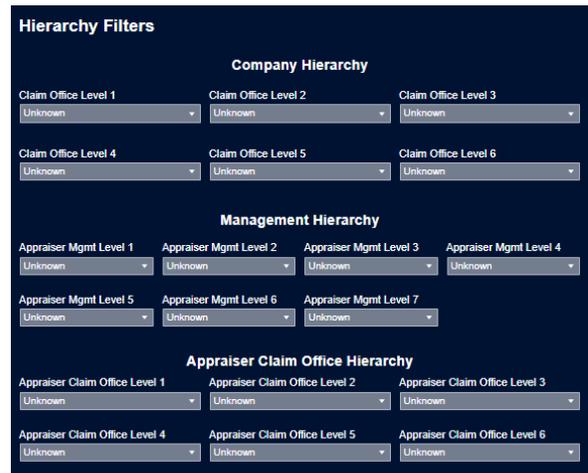
Book and **Question Mark** icons:

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

Hierarchy Filters

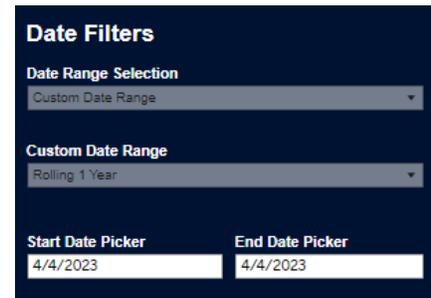
Note: Click **Apply** to confirm any changes.

Stage	Description
1	Displays the Company Hierarchy filter options.
2	Displays the Management Hierarchy filter options.
3	Displays the Appraiser Claim Office Hierarchy filter options.



Date Filters

Stage	Description
1	Date Range Selection: Select either Custom Date Range or Fixed Date Range .
2	Custom Date Range: Select a Rolling, Current, Prior date range option from the dropdown.
3	Start Date/ End Date: Select or enter a Start and End Date , if Fixed the Date Range Selection is chosen.



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Audit Guidelines Detail Data Dashboard, Continued

Dashboard Filters, Continued

Data Filter

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

Stage	Description
1	The Audit filter options allow you to filter claims such as, application, audit type or category completed displayed in the dashboard.
2	The Claim filter options allow you to change the type of claim data displayed in the dashboard, such as Loss Category or Airbag Deployed status displayed in the dashboard.
3	The Appraiser filter options allow you to filter by attributes related to the Appraiser involved with the claim, such as their Name or their State displayed in the dashboard.
4	The Vehicle filter options allow you to filter by attributes related to the vehicle involved with the claim, such as the Make or Year displayed in the dashboard.
5	The Condition filter options allow you to filter by attributes related to the vehicle's condition involved with the claim such as, the Drivable status or Point of Impact in the dashboard.

Data Filters

Audit

Audit Application
(All)

Audit Type
(All)

Rule Type
(All)

Rule
(All)

Scorecard Flag
(All)

Action Indicator
(All)

Predictive Recommendation
(All)

Rule Category
(All)

Rule Sub Category
(All)

Claim

Claim Type
(All)

Claim Category Desc
Unknown

Claim Type Detail Desc
Unknown (Unknown)

Airbag Deployed
(All)

File Type
(All)

Loss Category
(All)

MOI Inspection Location
(All)

Appraiser

Appraiser Name
(All)

MOI Appraiser Type
(All)

File Appraiser State
(All)

Vehicle

Vehicle Source Desc
(All)

Vehicle Manufacturer Desc
(All)

Vehicle Make Desc
(All)

Vehicle Model Display Name
(All)

Vehicle Type Desc
(All)

Vehicle Year
(All)

Vehicle Style Desc
(All)

Vehicle Door Style Desc
(All)

Vehicle Body Style Desc
(All)

Condition

Driveable
(All)

Repairable Condition
(All)

Primary Point of Impact Category
(All)

Primary Point of Impact
(All)

Odometer Range
(All)

Vehicle Age Group
(All)

Vehicle Age Code
(All)

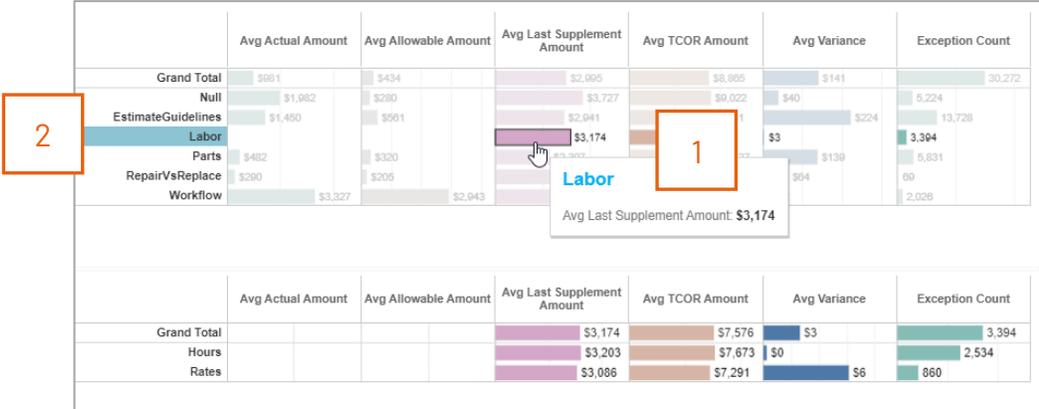
Secondary Point of Impact
(All)

Secondary Company Name
 Secondary Company

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Audit Guidelines Detail Data Dashboard, Continued

Dashboard Navigation

Stage	Description
1	Hover over dashboard elements to view dashboard details.
2	<p>Select a metric(s) to filter the dashboard view by that metric(s).</p> 
3	<p>Select the desired attribute from the Breakout Attribute dropdown to see how it compares to the company average.</p> 
4	<p>Enter a term in the search field to filter the available results, then press the Enter key to apply.</p> <p>Note: To revert and show all results, clear the search field and press Enter.</p>
5	<p>To adjust the metrics visible in the columns, click the Metrics dropdown, then select/deselect the checkbox's associated metrics to display/ hide them from the bar charts view, click Apply to apply the changes.</p>



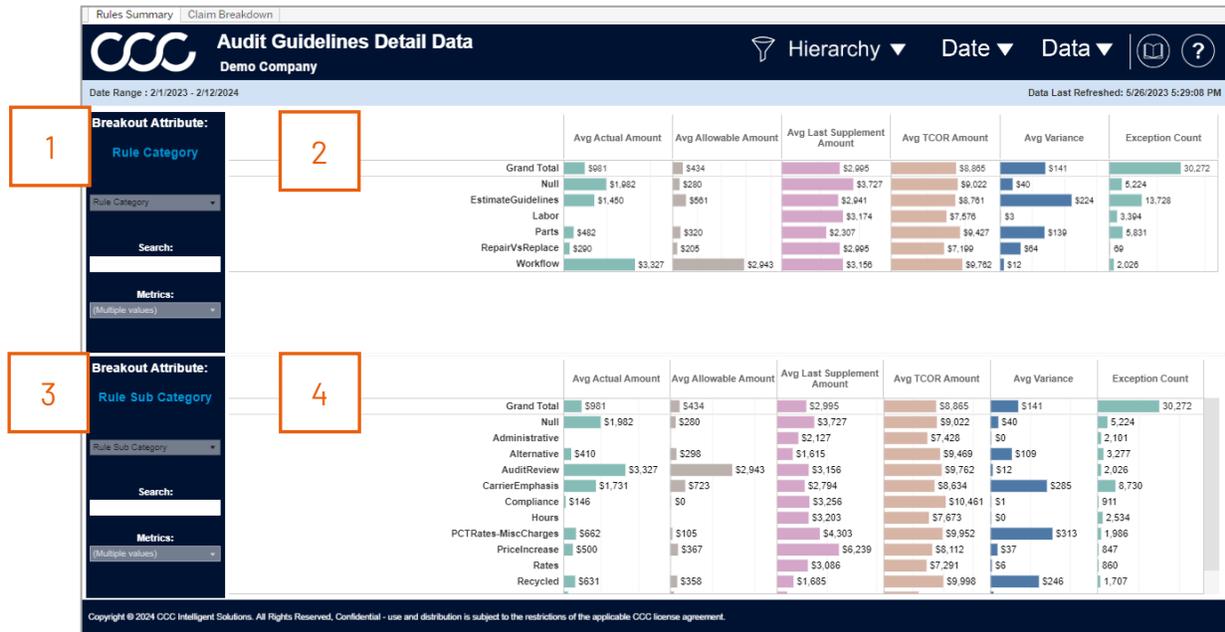
The screenshot shows the dashboard with the search field and Metrics dropdown highlighted. The Metrics dropdown is open, showing a list of metrics with checkboxes. The 'Avg Actual Amount' and 'Avg Allowable Amount' metrics are checked. The 'Apply' button is visible at the bottom of the dropdown.

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Audit Guidelines Detail Data Dashboard, Continued

Rules Summary

The **Rules Summary** tab provides insight into various attributes such as Claim Type, Appraiser Name/State across various metrics such as Avg Score per file, Avg TCOR, etc.



Stage	Description
1	The Breakout Attribute section allows you to select a breakout attribute and metric(s) to be displayed in breakout attribute chart to the right.
2	Displays the bar chart of the KPIs selected from breakout attribute selection to see how it compares to the company average.
3	The Breakout Attribute section allows you to select a breakout attribute and metric(s) to be displayed in breakout attribute chart to the right.
4	Displays the bar chart of the KPIs selected from breakout attribute selection to see how it compares to the company average.

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Audit Guidelines Detail Data Dashboard, Continued

Claim Breakdown

The screenshot shows the 'Audit Guidelines Detail Data' dashboard for 'Demo Company'. At the top, there are navigation tabs for 'Rules Summary' and 'Claim Breakdown'. The dashboard includes a header with the CCC logo, a 'Hierarchy' dropdown, and filters for 'Date' and 'Data'. Below the header, there is a 'Date Range' of 2/1/2023 - 2/12/2024 and a 'Data Last Refreshed' timestamp of 5/26/2023 5:29:08 PM. A 'Show Crosstab' section has radio buttons for 'Yes' (selected) and 'No'. A 'Measures' dropdown menu is set to '(Multiple values)'. The 'Total Rows' area shows 30,272 records. A 'Download Crosstab' button is located on the right. The main section is titled 'Audit Detail Data' and contains a table with columns: Appraiser Name, Audit Application, Audit Type, MOI Inspection Type, MOI Standard Group, MOI Appraiser Type, MOI Inspection Location, and Claim Type. The table lists various appraisers and their associated audit details. A 'Download Crosstab' popup window is shown in the bottom right, allowing users to select a sheet and format (Excel or CSV) for download.

Stage	Description
1	Select Yes from the Show Crosstab section to display the Audit Detail Data.
2	Use the Measures dropdown to select specific measure(s) to display in Audit Detail Data grid.
3	The Total Rows area displays the count of records in the Audit Detail Data section.
4	Click Download Crosstab to download the Audit Detail Data in an Excel or CSV format. <ul style="list-style-type: none"> A. Choose the Download Crosstab export option. B. Select the desired sheet from the Download Crosstab popup. C. Then click Download to complete the export.
5	The Audit Detail Data section shows all the attributes/data points that reference the individual claim breakdown information.

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