Audit Guidelines Summary Data Dashboard

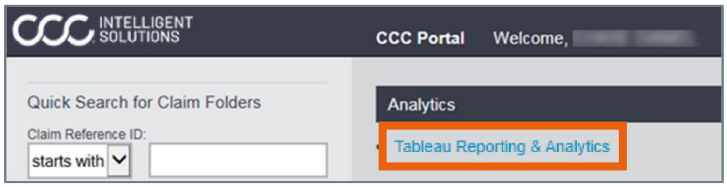
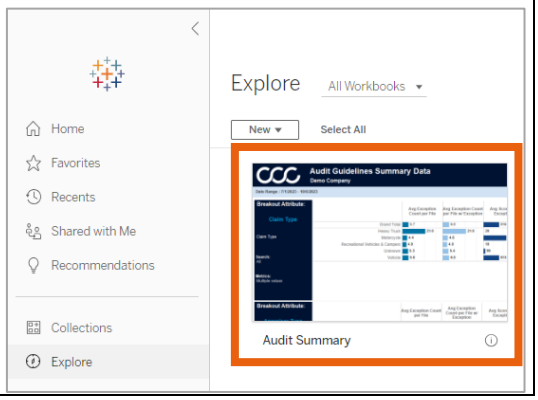
Introduction

The **Audit Guidelines Summary Data Dashboard** assists the Appraiser Managers to see the average exception per file or scores coming for different appraisers. Additionally, this dashboard allows users to see file exceptions coming up based on different MOI types.

This dashboard provides visualizations, analytics, and actionable insights, including:

- Exceptions on Estimate and supplement files
- Average scores
- Exception counts
- And more

Access Audit Guidelines Summary 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 **Audit Summary** Dashboard.

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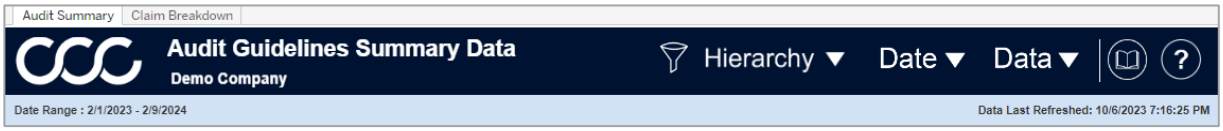
Audit Guidelines Summary Data Dashboard, Continued

Dashboard Filters



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

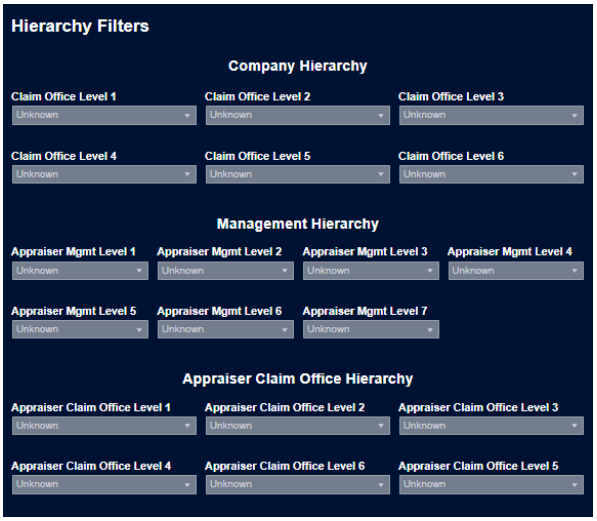
Book and **Question Mark** icons:

- 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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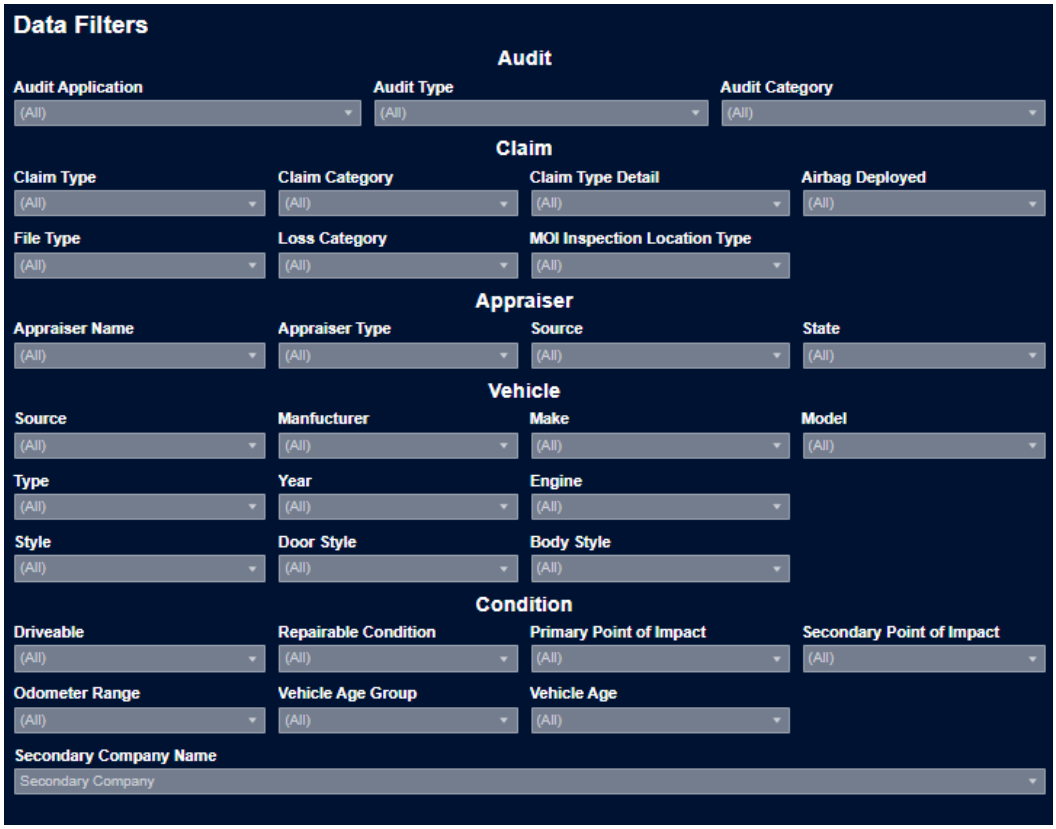
Audit Guidelines Summary Data Dashboard, Continued

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.



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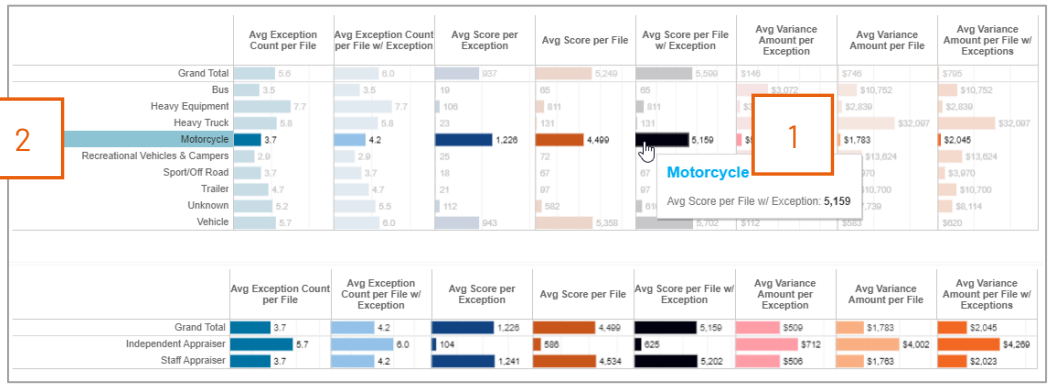
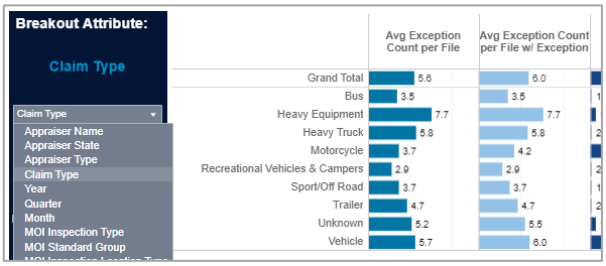
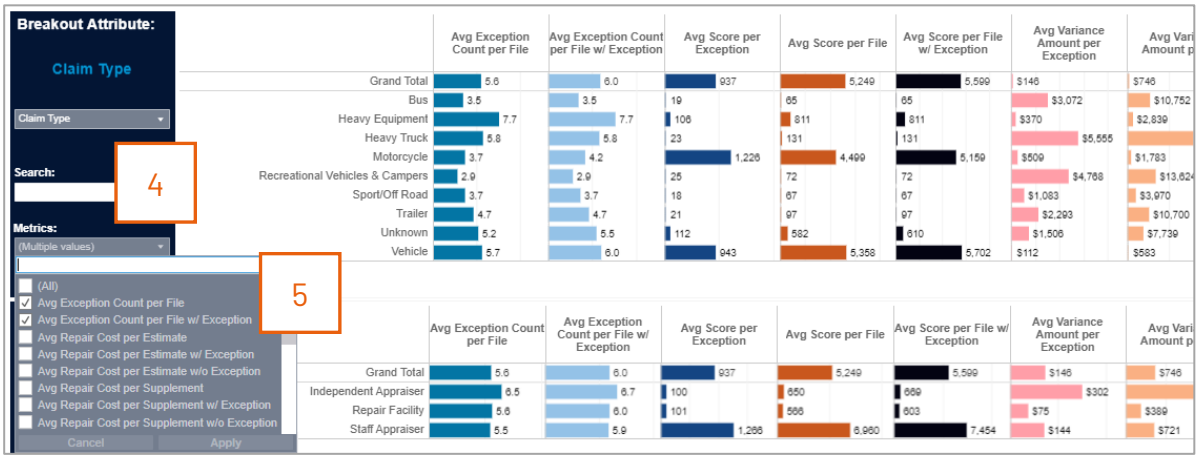
Audit Guidelines Summary Data Dashboard, Continued

Dashboard Navigation

Stage	Description
1	Hover over dashboard elements to view dashboard details.
2	Select a metric(s) to filter the dashboard view by that metric(s). 
3	Select the desired attribute from the **Breakout Attribute** dropdown to see how it compares to the company average. 
4	Enter a term in the search field to filter the available results, then press the **Enter** key to apply. **Note:** To revert and show all results, clear the search field and press **Enter**.
5	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.



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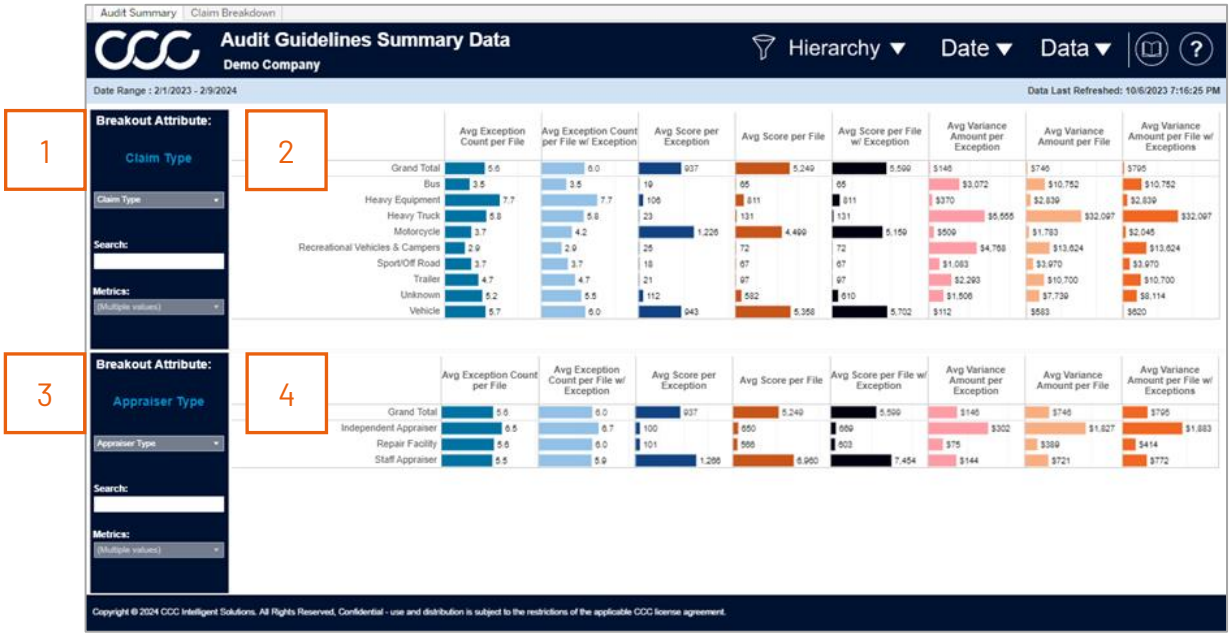
Audit Guidelines Summary Data Dashboard, Continued

Audit Summary

The **Audit 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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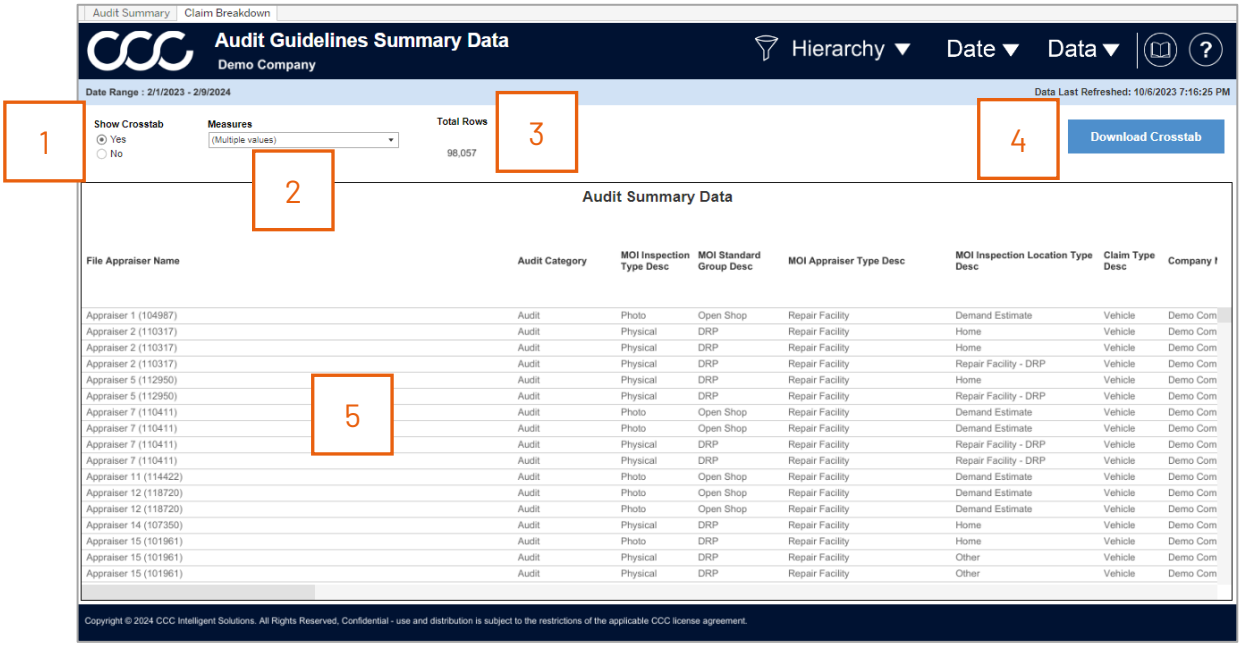
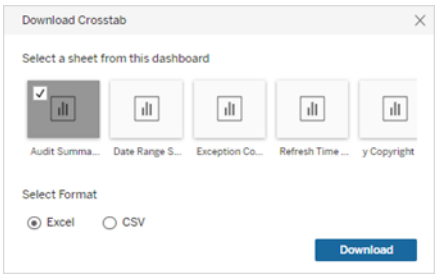
Audit Guidelines Summary Data Dashboard, Continued

Claim Breakdown



Stage	Description
1	Select **Yes** from the Show Crosstab section to display the Audit Summary Data.
2	Use the **Measures** dropdown to select specific measure(s) to display in Audit Summary Data grid.
3	The **Total Rows** area displays the count of records in the Audit Summary Data section.
4	Click **Download Crosstab** to download the Audit Summary Data in an Excel or CSV format. 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 Summary Data** section shows all the attributes/data points that reference the individual claim breakdown information.

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