## **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	Desc	ription					
1	Enter your <b>User ID</b> and <b>Password</b> to login to the CCC <sup>®</sup> Portal.						
2	Click the <b>Tableau</b> <b>Reporting &amp; Analytics</b> link in the Analytics section of the CCC <sup>®</sup> Portal home page. A new Analytics window opens.		CCC Portal Welcome, Analytics • Tableau Reporting & Analytics				
3	Click <b>Explore</b> on the left-side panel.		<				
4	Select <b>All Workbooks</b> from the dropdown.	t‡‡ ∴ Home	Explore All Workbooks • New • Select All				
5	Select the <b>Audit Summary</b> Dashboard.	☆ Favorites         ③ Recents         ◆g Shared with Me         ♀ Recommendations          Collections         ④ Explore	s				



### **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	e Description						
1	Displays the <b>Company Hierarchy</b> filter						
	options.						
2	Displays the Management Hierarchy						
	filter options.						
3	Displays the Appraiser Claim Office						
	Hierarchy filter options.						

		Company	Hierarchy				
Claim Office Level 1		Claim Office Level 2		Claim Office Level 3			
Unknown	•	Unknown	•	Unknown	Unknown 👻		
Claim Office Level 4		Claim Office Leve	15	Claim Of	fice Level 6		
Unknown	•	Unknown	*	Unknown			
Appraiser Mgmt Level 1 Unknown +	Appraise Unknow	er Mgmt Level 2	nt Hierarchy Appraiser Mgmt Unknown	Level 3	Appraiser Mgmt Level 4 Unknown		
Unknown 👻	Unknow	er Mgmt Level 6	Appraiser Mgmt	T	Appraiser Mgmt Level 4 Unknown		
Unknown	Appraise Unknown	er Mgmt Level 6	Appraiser Mgmt I Unknown Appraiser Mgmt I Unknown	• Level 7 •			
Unknown   Appraiser Mgmt Level 5 Unknown	Appraise Unknown Unknown	er Mgmt Level 6	Appraiser Mgmt i Unknown Appraiser Mgmt i Unknown Office Hierard	v Level 7 v Chy	Unknown		
Unknown Appraiser Mgmt Level 5	Appraise Unknown Unknown	er Mgmt Level 6	Appraiser Mgmt i Unknown Appraiser Mgmt i Unknown Office Hierard	v Level 7 v Chy	Unknown er Claim Office Level 3		

### **Date Filters**

Stage	Description	Date Filters			
1	Date Range Selection: Select either Custom Date Range or Fixed Date Range.	Date Range Selection Custom Date Range	_		
2	<b>Custom Date Range:</b> Select a <b>Rolling</b> , <b>Current</b> , <b>Prior</b> date range option from the dropdown.	Custom Date Range Rolling 1 Year	_		
3	<b>Start Date/ End Date:</b> Select or enter a <b>Start</b> and <b>End</b> <b>Date</b> , if Fixed the Date Range Selection is chosen.	Start Date Picker 6/1/2023	End Date Picke 6/30/2023		



### Dashboard Filters, Continued

### **Data Filter**

Note: Click Apply to confirm any changes.

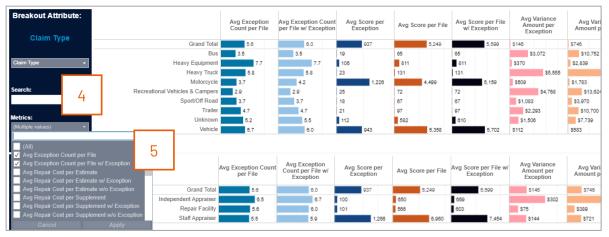
Stage	Description
1	The <b>Audit</b> filter options allow you to filter claims such as application, audit type or
	category completed displayed in the dashboard.
2	The <b>Claim</b> filter options allow you to change the type of claim data displayed in the
	dashboard, such as Loss Category or Airbag Deployed status displayed in the
	dashboard.
3	The <b>Appraiser</b> 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 <b>Vehicle</b> 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 <b>Condition</b> 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						
	Au	dit				
Audit Application	Audit Type	A	Audit Category			
(All)	▼ (All)	<b>*</b>	(All) 👻			
	Cla	im				
Claim Type	Claim Category	Claim Type Detail	Airbag Deployed			
(All) 👻	(All) 🔹	(All)	▼ (All)			
File Type	Loss Category	MOI Inspection Location Ty	ире			
(All) 🔻	(All) 🔹	(All)	-			
	Appr	aiser				
Appraiser Name	Appraiser Type	Source	State			
(All) 🔻	(All) 🔹	(All)	▼ (All) ▼			
	Veh	icle				
Source	Manfucturer	Make	Model			
(All) 🔻	(All) 🔹	(All)	▼ (All) ▼			
Туре	Year	Engine				
(All) 🔻	(All) 🔹	(All)	*			
Style	Door Style	Body Style				
(All) 👻	(All) 🔹	(All)	·			
	Cond	lition				
Driveable	Repairable Condition	Primary Point of Impact	Secondary Point of Impact			
(All) 👻	(All) 👻	(All)	• (All) •			
Odometer Range	Vehicle Age Group	Vehicle Age				
(All) 🔻	(All) 🔹	(All)	×			
Secondary Company Name						
Secondary Company			•			



### **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).								
	Avg Exception Count per File         Avg Exception Count per File w/ Exception         Avg Score per File         Avg Score per File         Avg Variance w/ Exception         Avg Variance w/ Exception         Avg Variance w/ Exception         Avg Variance Amount per File w/ Exception         Avg Variance w/ Exception         Avg Variance w/ Exception         Avg Variance Amount per File         Avg Variance Amount per File								
	Grand Total         5.6         6.0         8.0         6.7         5.640         5.660         \$140         5.746         \$746								
	Heavy Equipment 7.7 7.7 108 811 811 81 \$2,839 \$2,839								
	2         Motorcycle         3.7         4.2         1.228         4.499         5.159         8         1         \$1.783         \$2.045           Recreational Vehicles & Campers         2.9         25         72         4.499         5150         \$								
	Sport/Off Road         1.7         1.7         18         67         67         Motorcycle         70         53.070           Tailer         4.7         2.1         67         67         Motorcycle         70         53.070								
	Unknown 5.2 5.5 112 662 662 662 662 662 662 662 662 662								
	Vehicle 6.7 0.0 943 6,358 5.702 5112 5585 9620								
	Avg Exception Count per File     Avg Exception Count per File w/ Exception     Avg Score per Exception     Avg Score per File     Avg Score per File w/ Exception     Avg Variance Amount per Exception     Avg Variance Amount per File w/ Exception     Avg Variance Avg Variance     Avg Variance Amount per File w/ Exception								
	Grand Total 3.7 4.2 1.228 4.499 5.159 5.159 5.109 5.1783 52.045								
	Staff Appraiser 3.7 4.2 1.241 4.534 5.202 \$506 \$1.783 \$2.023								
3	Select the desired attribute from the <b>Breakout Attribute</b> dropdown to see how it compares to the company average. Breakout Attribute: Claim Type Claim Claim Cl								
4	Enter a term in the search field to filter the available results, then press the								
	Enter key to apply.								
	<b>Note:</b> To revert and show all results, clear the search field and press <b>Enter</b> .								
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 <b>Apply</b> to apply the changes.								
	The bar onal to the try onor <b>Apply</b> to apply the onaligeo.								





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

C		Audit Guide	lines Summa	ry Data			🖓 Hier	archy 🔻	Date 🔻	Data 🔻	
Date R	lange : 2/1/2023 - 2/9/	2024								Data Last Refreshed	10/6/2023 7:16:25
1	kout Attribute:	2		Avg Exception Count per File	Avg Exception Coun per File w/ Exception		Avg Score per File	Avg Score per File w/ Exception	Avg Variance Amount per Exception	Avg Variance Amount per File	Avg Variance Amount per File Exceptions
	Claim Type	- Z	Grand Total	5.6	6.0	937	5.249	5.500	5140	\$745	\$795
Claim	Type •	3	Bus Heavy Equipment Heavy Truck	35	3.5	10 106 23	05 011 131	05 011 131	\$3.072 \$370 \$6.665	\$10,752 \$2,839 \$32,097	\$10,752 \$2,839 \$32,0
Search	i	Recret	Motorcycle tional Vehicles & Campers	3.7	4.2	1,226	4,400	5.159	\$509 \$4,768	\$1.783 \$13.624	\$2,045 \$13.624
Metrice	N: Na valuesi (		Sport/Off Road Trailer Unknown Vehicle	3.7 4.7 5.2 5.7	3.7 4.7 5.5 6.0	10 21 112 043	67 97 582	67 97 610 5.702	\$1.003 \$2.293 \$1.506 \$112	\$3,970 \$10,700 \$7,739 \$583	\$3.970 \$10.700 \$8.114 \$620
	kout Attribute:		,	Nyg Exception Count	Avg Exception Count per File w/ Exception	Avg Score per Exception	Avg Score per File	Avg Score per File w/ Exception	Avg Variance Amount per Exception	Avg Variance Amount per File	Avg Variance Amount per File Exceptions
3	ppraiser Type	_ 4									
		-	Grand Total	5.0	6.0	937	5,249	5,599	\$140	\$746	\$798
home	ser Type 🔹		Repair Facility	50		100	566	602	\$75	\$389	5414
(haine)		a	Staff Appraiser	5.5	5.9	1,268	000	7,454	\$144	\$721	3772
Search	e		9. SS			the co					
Metrics	n: Ne values) •										

Stage	Description
1	The <b>Breakout Attribute</b> 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 <b>Breakout Attribute</b> 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.



Claim Breakdown m Brea Audit Guidelines Summary Data Ì √ Hierarchy ▼ Date 🔻 Data 🔻  $|(\square)(?)$ , Demo Company Data Last Refreshed: 10/6/2023 7:16:25 PM 2/1/2023 - 2/9/2024 Show Crosstab Total Rows Measures 3 1 Ŧ 4 Yes
 No (Multiple 98,057 2 Audit Summary Data MOI Inspection MOI Standard Type Desc Group Desc MOI Inspection Location Type Desc Claim Type Company ! File Appraiser Name MOI Appraiser Type Desc Audit Category Appraiser 1 (104987) Open Shop DRP DRP Demand Estimate Repair Facility Demo C Appraiser 2 (110317) Demo Com Audit Physical Repair Facility Home Vehicle Appraiser 2 (110317) Appraiser 2 (110317) Appraiser 2 (110317) Appraiser 5 (112950) Repair Facility Repair Facility Repair Facility Demo Com Demo Com Demo Com Demo Com Physical Physical Audit Home Vehicle Audit DRP Repair Facility - DRP Vehicle Audit Physical Vehicle Appraiser 5 (112960) Appraiser 7 (112970) Appraiser 7 (110411) Appraiser 7 (110411) Appraiser 7 (110411) Appraiser 7 (110411) Appraiser 11 (114422) Appraiser 12 (118720) Appraiser 14 (107350) Appraiser 15 (101861) Appraiser 15 (101861) Home Demo Com Physical Photo Photo Repair Facility - DRP Audit DRP Repair Facility Vehicle Open Shop Open Shop DRP DRP 5 Audit Audit Repair Facility Repair Facility Demand Estimate Demand Estimate Vehicle Vehicle Repair Facility - DRP Repair Facility - DRP Demand Estimate Audit Physical Repair Facility Vehicle Physical Photo Photo Repair Facility Repair Facility Repair Facility Audi Vehicle Vehicle Open Shop Open Shop Audit Audit Demand Estimate Vehicle Repair Facility Repair Facility Repair Facility Vehicle Vehicle Vehicle Demo Com Demo Com Demo Com Audit Photo Open Shop Demand Estimate Physica Photo DRP Home Audit Home DRP Demo Com Demo Com Appraiser 15 (101961) Audit Physical Repair Facility Other Vehicle praiser 15 (101961) Audi Physical DRP Repair Facility Other Vehicle ight © 2024 CCC Intellig ject to the re ns of the applicable CCC license agre

Stage	Description						
1	Select <b>Yes</b> from the Show Crosstab section to display the Audit Summary Data.						
2	Use the <b>Measures</b> dropdown to select specific measure(s) to display in Audit Summary Data grid.						
3	The <b>Total Rows</b> area displays the count of records in the Audit Summary Data section.						
4	<ul> <li>Click <b>Download Crosstab</b> to download the Audit Summary Data in an Excel or CSV format.</li> <li>A. Choose the <b>Download Crosstab</b> export option.</li> <li>B. Select the desired sheet from the Download Crosstab popup.</li> <li>C. Then click Download to complete the export.</li> </ul>	Download Crosstab       X         Select a sheet from this dashboard       Image: Select format: Select Format         Audit Summa.       Date Range S.       Exception Co       Refresh Time       y Copyright         Select Format       Image: Select Format       Image: Select Format       Image: Select Format       Image: Select Format					
5	The <b>Audit Summary Data</b> section shows all the attri the individual claim breakdown information.	butes/data points that reference					

