

Estimate Review Insights

Introduction

This Job Aid covers how to use the **Estimate Review Insights Dashboard**. This dashboard provides users the following benefits:

- Provides a fully configurable view of Estimate Review data, for you to choose which metrics and breakout attributes you'd like to use.
- Provides the ability to save configurations of metrics, breakout attributes, and filters, to easily come back to or share with others.

This Job Aid covers the following topics (*select page # to jump to section*):

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Note: It's recommended to follow the topics above in sequential order to view or create a custom dashboard.

Note: [Click Here](#) for a full list of Estimate Review Insights terms and definitions or visit the Portal Learning Center accessible from the help icon on mycccportal.com.

Example Use Cases

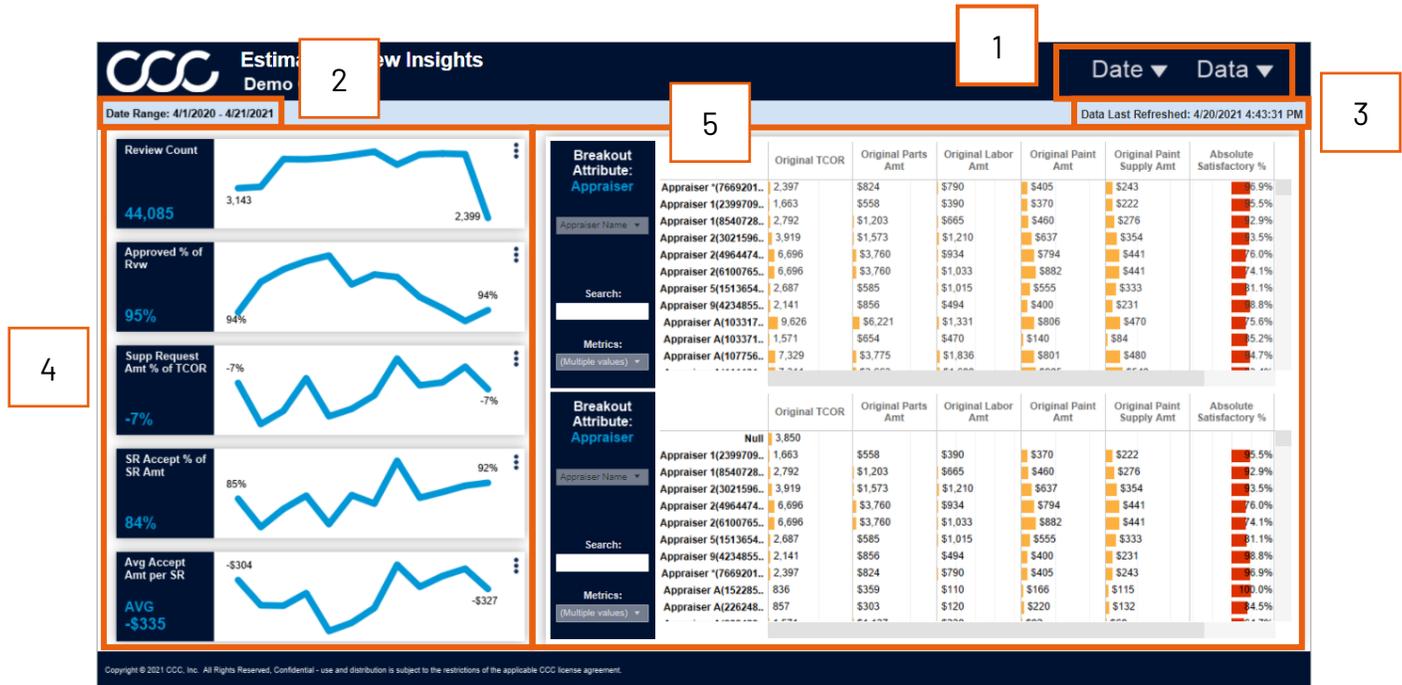
The following are use case examples for the Estimate Review Insights dashboard:

- Reviewer managers can compare how their team is performing against the average.
 - Reviewer managers can compare how individual reviewers are performing against the average or against their teammates.
 - View how many reviews were completed and the associated cost savings, broken out by appraiser, appraiser state, appraiser type, etc.
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Estimate Review Insights, Continued

Estimate Review Insights Dashboard Layout



Review the table below for a description of the parts of the **Estimate Review Insights Dashboard**:

Part	Description
1	Date and Data filters, see page 5 for additional details.
2	Shows the Start Date and End Date range selected from the Date filter.
3	The Date Last Refreshed indicates the last date and time the data was refreshed in the dashboard.
4	The Key Performance Indicators (KPI) tiles show a list of customizable metric trend lines for the selected time period based on the options selected in the Data filter. The line chart displays the (A) start and end totals. Each tile also displays the (B) aggregate of the metric over the entire period (sum or average, depending on the metric) See page 3 for additional details to configure these tiles.
5	The bar charts show selected Breakout Attributes with additional filtering and searching capabilities. See page 4 for additional details to configure these bar charts.

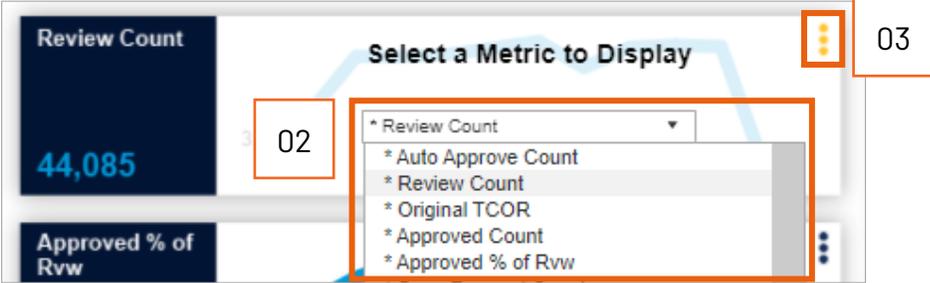


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Dashboard Configuration

To view or create a custom dashboard, follow the steps below to configure the KPI tiles in the dashboard:

Step	Action
1	Select the ellipsis icon to open the Select a Metrics to Display menu. 
2	Select the desired metric from the dropdown, the metric will automatically be applied to the dashboard when selected. Note: The metrics with an asterisk (*) are preferred.
3	Select the ellipsis icon again to close the Select a Metric to Display menu.
	

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Dashboard Configuration, continued

To view or create a custom dashboard, follow the steps below to configure the bar charts:

Step	Action
1	Select the desired attribute from the Breakout Attribute drop-down.
2	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 .
3	To adjust the metrics visible in the columns, select the Metrics drop-down, then select/deselect the checkbox's associated metrics to display/hide them from the bar chart's view, select Apply to apply the changes.

The screenshot shows the dashboard configuration interface with three key elements highlighted:

- Breakout Attribute:** A dropdown menu is open, showing a list of appraisers and their associated metrics. The value 'Appraiser' is selected.
- Search:** A search field is highlighted with a red box and the number '02'. It contains the text 'Appraiser'.
- Metrics:** A dropdown menu is open, showing a list of metrics with checkboxes. The value '(All)' is selected. The number '03' is highlighted next to the dropdown.

Breakout Attribute:		Original TCOR	Original Parts Amt	Original Labor Amt	Original Paint Amt	Original Paint Supply Amt	Absolute Satisfactory %
Appraiser *(7669201..	2,397	\$824	\$790	\$405	\$243	66.9%	
Appraiser 1(2399709..	1,663	\$558	\$390	\$370	\$222	55.5%	
Appraiser 1(8540728..	2,792	\$1,203	\$665	\$460	\$276	29.9%	
Appraiser 2(3021596..	3,919	\$1,573	\$1,210	\$637	\$354	33.5%	
Appraiser 2(4964474..	6,696	\$3,760	\$934	\$794	\$441	76.0%	
Appraiser 2(6100765..	6,696	\$3,760	\$1,033	\$882	\$441	74.1%	
Appraiser 5(1513654..	2,687	\$585	\$1,015	\$555	\$333	31.1%	
Appraiser 9(4234855..	2,141	\$856	\$494	\$400	\$231	38.8%	
Appraiser A(103317..	9,626	\$6,221	\$1,331	\$806	\$470	75.6%	
Appraiser A(103371..	1,571	\$654	\$470	\$140	\$84	52.2%	
Appraiser A(107756..	7,329	\$3,775	\$1,836	\$801	\$480	44.7%	

Estimate Review Insights, Continued

Dashboard Filtering

Review the table below for a description of the **Date** and **Data** filters, adjust the filters as needed:



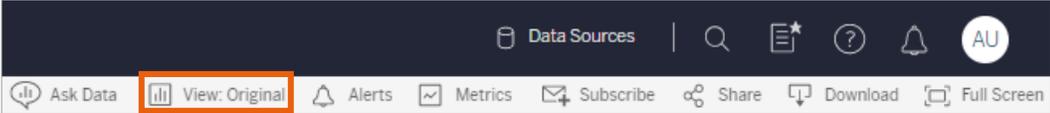
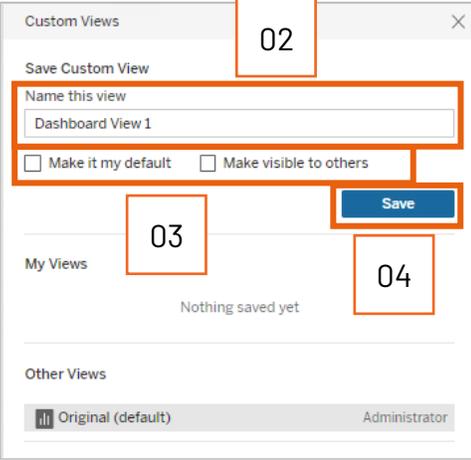
Part	Description
1	<p>Date Filters: Select a Date Range Selection from the dropdown: • Rolling Date Range • Fixed Date Range</p> <p>Note: Once Rolling or Fixed is selected use the dropdowns below to populate the date range based on the selection.</p> <p>Select a Rolling Date Range from the dropdown: • 3 Month • 6 Month • 9 Month • 1 Year • 18 Month • 2 Years</p> <p>Note: The rolling date will always end with the current date.</p> <p>Select or Enter a Start Date and End Date to set the Fixed Date Range.</p> <p>Select a Trend Aggregation from the drop-down to display how the trend lines are aggregated: • Years • Quarters • Months • Weeks</p>
2	<p>Data Filters: First/Latest Supplement: Select a First & Unsupplemented or Latest & Unsupplemented from the drop-down.</p> <p>Estimate only? Select to view Estimates and/or Supplements, then select Apply.</p> <p>Overwrite/Underwrite: Select to view All, Neither, Overwrite, or Underwrite.</p> <p>Review Action Taken: Select one or multiple Review Action options to view, then select Apply.</p> <p>Appraiser Type: Select one or multiple Appraiser options to view, then select Apply.</p> <p>Review Method (Application): Select one or multiple Review Method options to view, then select Apply.</p> <p>Hierarchy Filters: Select one or multiple Hierarchy options to view, then select Apply.</p> <p>Note: A Company drop-down filter(s) may be present based on your configuration.</p>

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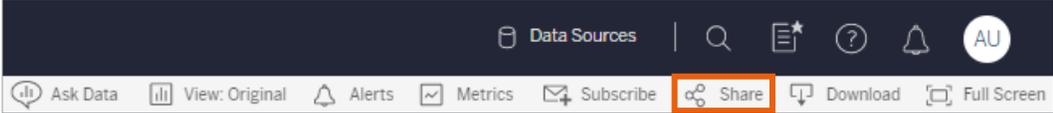
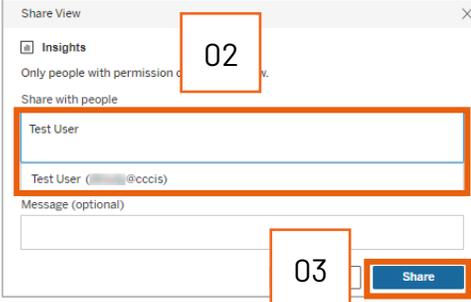
Estimate Review Insights, Continued

Saving a Dashboard View Views are a way to save configurations of metrics, breakout attributes, and filters, and easily come back to them. You can even save multiple views and easily flip between them.

To view or create a custom dashboard, follow the steps in the table below to save a view once the dashboard has been configured and filtered:

Step	Action
1	Select View: Original from the Tableau menu, the Save Custom View dialog box opens. 
2	Enter a name for the view in the Name this view field.
3	Use the following checkboxes to adjust the views settings: <ul style="list-style-type: none"> • Make it my default: Select to make the settings your default view when opening the dashboard. • Make visible to others: Select to make the dashboard configurations visible to other users in your organization, an option will display to select the dashboard. 
4	Select Save , the custom dashboard is now completed and will now appear in the My Views area of the Custom View dialog box.

Follow the steps below to share with a dashboard view with specific people in your organization:

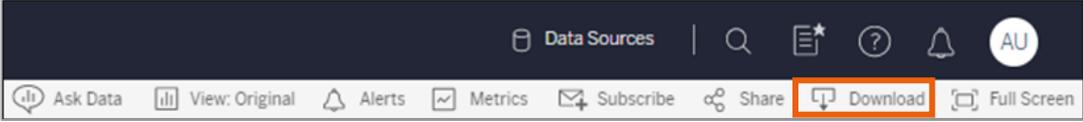
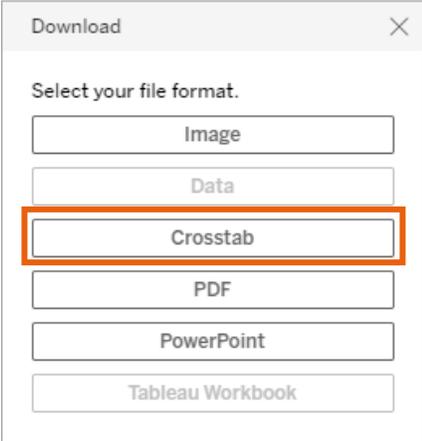
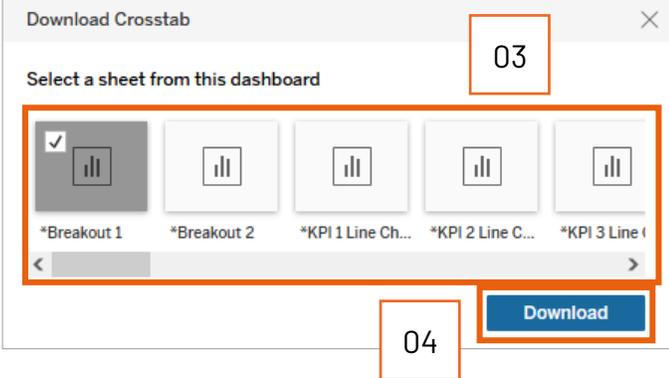
Step	Action
1	Select Share from the Tableau menu, the Share View dialog box opens. 
2	Enter the name of the person in your organization to share the view with.
3	Select Share when complete, the custom dashboard is now completed and the person will review a notification that a view has been shared with them. 

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Estimate Review Insights, Continued

Exporting Dashboard Data The dashboard provides users with the ability to download data present in the dashboard. Users can also adjust the filters to download more data.

To export detail records, follow the steps outlined in the table below:

Step	Action
1	<p>Select the Download button in the dashboard toolbar.</p> 
2	<p>Choose an export option. To download the .csv file select Crosstab.</p> 
3	<p>Select a sheet from the Download Crosstab dialog box.</p> <p>Note: Sheets of interest have a "*" prefix. Breakout 1 is the top bar chart; Breakout 2 is the bottom bar chart, and the five-line charts are KPI 1-5.</p> 
4	<p>Select Download, from the Download Crosstab dialog box. Open the .csv file from your computer's downloads section.</p>

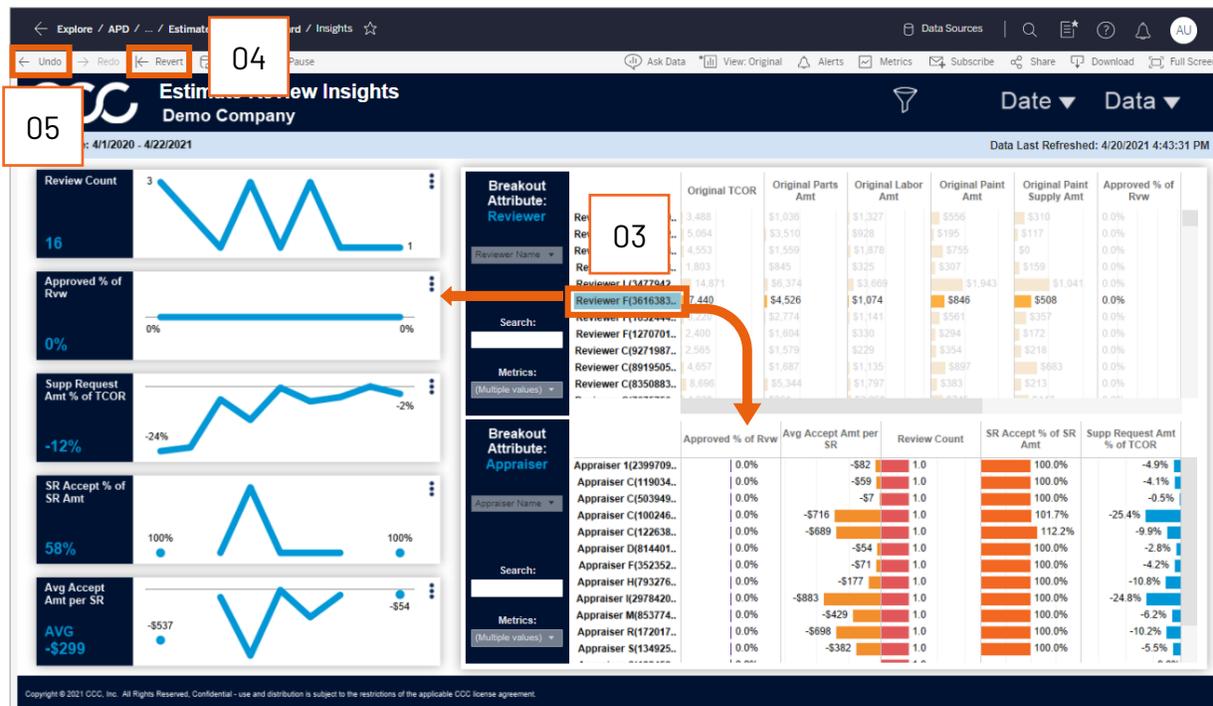
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Action Filtering

The table below shows how to filter dashboard items and how use the Tableau menu items to navigate the dashboard.

Part	Description
1	Hover over the line chart to view the selected metric's detail and date for each point of aggregation. 
2	Hover over bar chart columns and select the sort icon to sort the column in an ascending order, descending order, or the default order (<i>alphabetical by attribute</i>). 
3	Select bar or line chart items to filter the dashboard to only display items related to that selection. For example, selecting a Reviewer from the list will affect the Appraiser charts and only show the Appraisers that Reviewer has reviewed. Additionally, the line charts will also adjust to display the trends based on your selection. Note: Select any selected bar or line chart item again to deselect it.
4	Select the Revert button to undo all actions and revert the dashboard back to the default view.
5	Select the Undo button to undo actions one at a time.



The screenshot shows the 'Estimate Review Insights' dashboard for 'Demo Company'. The top navigation bar includes buttons for 'Undo' and 'Revert', with a red box labeled '04' highlighting the 'Revert' button. A red box labeled '05' highlights the 'Undo' button. The dashboard displays several charts: 'Review Count' (16), 'Approved % of Rvw' (0%), 'Supp Request Amt % of TCOR' (-12%), 'SR Accept % of SR Amt' (58%), and 'Avg Accept Amt per SR' (-\$299). A table on the right shows 'Original TCOR' and 'Original Parts Amt' for various reviewers. A red box labeled '03' highlights a reviewer name in the table, with an arrow pointing to the 'Review Count' chart, indicating that selecting a reviewer filters the dashboard.

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Data Considerations

- The dataset contains reviews from 3 applications: **CCC Portal** (Basic and Enhanced), **CCC One**, and auto approves from the **Workflow Auto Approve Rules Engine**. Currently the dashboard only includes R1s (reviews of an appraisal file). Re-reinspection, Ad Hoc, etc, will be included in a later version.
 - The dataset is filtered to only include reviews where the **Claim Type** equals **Vehicle** (excluding motorcycles, RVs, etc).
 - The Estimate Review application generates a compare report for every supplement that comes in. To prevent unwanted duplication of data (Original TCOR, etc), the dashboard is set up to show only **ONE** review or compare report, per review. In the **Data Filters** menu, a user has the option to select **First & Unsupplemented** or **Latest & Unsupplemented**. This prevents you from being able to see both the first and latest supplement compare report for the same review at the same time. Unsupplemented reviews will always be included.
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Hierarchy

This dashboard pulls hierarchy information from the **CLEAR** registration system. In the CLEAR, each staff user has a field for their manager to be entered.

Analytics takes these **Employee -> Manager** relationships and builds the hierarchy “tree” as follows:

1. Find managers that don't report to anyone, these are the Level 1 managers. They could also be referred to as the **Top Level** managers.
2. Any person whose manager is Level 1 becomes Level 2.
3. Any person whose manager is Level 2 becomes Level 3.
4. Repeat this hierarchy down to Level 7.

Notes:

- If a person does not report to anyone, but also does not have anyone reporting to them, they are not Level 1 and do not show up in the hierarchy. This was done so that if the data entry is incomplete in CLEAR, there are not random users show up in Level 1.
 - The Top Level(s) aren't required to be a person. In CLEAR a **user** can be created that is a region, team name, etc., and managers can **report** to it.
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