# **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 UseThe following are use case examples for the Estimate Review InsightsCasesdashboard:

- 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.

Continued on next page



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# 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 <b>Start Date</b> and <b>End Date</b> range selected from the Date filter.
3	The <b>Date Last Refreshed</b> indicates the last date and time the data was refreshed in the dashboard.
4	The <b>Key Performance Indicators</b> (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 <b>(A)</b> start and end totals. Each tile also displays the <b>(B)</b> aggregate of the metric over the entire period (sum or average, depending on the metric) See page <b>3</b> for additional details to configure these tiles. B
5	The bar charts show selected Breakout Attributes with additional filtering and
	searching capabilities. See page <b>4</b> for additional details to configure these bar charts.



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





#### Dashboard Configuration,

continued

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

itep				Actior	n			
1	Select the desired attribute from the <b>Breakout Attribute</b> drop-down.							
	Breakout Attribute:	Ori	ginal TCOR 0	Driginal Parts C Amt	Original Labor Amt	Original Paint Amt	Original Paint Supply Amt	t Absolute Satisfactory %
	Appraiser Appraiser	*(7669201 2,3	97 \$8	324 \$	790	\$405	\$243	96.9%
	Appraiser	1(2399709 1.6	3 \$5	558 \$3	390	\$370	\$222	<mark>9</mark> 5.5%
	Appraiser Name + Appraiser	1(8540728 2.7	51	1,203 \$	665	\$460	\$276	2.9%
	Rvvvr Mgmt Level 1	2(3021596. 3,9	19 \$1,	1,573 \$	51,210	\$637	\$354	3.5%
	Rvvr Mgmt Level 2	2(4964474. 6,6	96 \$3	3,760 \$	934	\$794	\$441	76.0%
	Rywr Mamt Level 4	2(6100765 6,6	96 \$3	3,760 \$	1,033	\$882	\$441	74.1%
	Rvvvr Mgmt Level 5	5(1513654 2,6	\$7 \$5	585 \$	51,015	\$555	\$333	<b>B</b> 1.1%
	Rvvvr Mamt Level 6	9(4234855 2,1	1 \$8	356 \$4	6494	\$400	\$231	<mark>9</mark> 8.8%
	select/deselect the		x's assoc	ciated me	etrics to	display/I	hide then	n from the ba
	chart's view, select	Αρριγιο	арріуті	e change	5.			
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#### **Dashboard Filtering**

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

te Rappe: 4	Demo Company		Data Last Refreshed: 4/20/2024 4:42:24 DM				
e Range: 4			Data Last Refreshed: 4/20/2021 4:45:51 PM				
Part	Description						
I	Date Filters:	$\bigtriangledown$	Date 🔻 Data 💌				
	e Polling Date Pange	V	Build V				
	• Rolling Date Range • Fixed Date Range		Data Last Refreshed: 4/20/2021 4:43:31 PM				
	Note: Once Rolling or Fixed is selected use the	Date Filters	int Original Paint_ Absolute				
	the selection	Date Range Selectio	n ·				
	Select a <b>Rolling Date Range</b> from the drondown:	Rolling Date Range					
	• 3 Month • 6 Month • 9 Month	1 Year Start Date	End Date				
	• 1 Year • 18 Month • 2 Years	3/1/2020	3/31/2021				
	<b>Note:</b> The rolling date will always end with the current	Trend Aggregation Months					
	date.						
	Select or Enter a Start Date and End Date to set the Fixed	d Date Rai	nge.				
	Select a <b>Trend Aggregation</b> from the drop-down to display how the trend lines are						
	aggregated						
	aggregateu:						
	• Years • Quarters • Months	• We	eks				
2	• Years • Quarters • Months  Data Filters:  First /L start Supplement: Salast a First 9	• We	eks Date ▼ Data ▼				
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2	• Years • Quarters • Months  Data Filters: First/Latest Supplement: Select a First & Unsupplemented or Latest & Unsupplemented from the drop-down.	• We	eks Date V Data V Data Last Refreshed: 4/20/2021 4:43:31 P				
2	• Years • Quarters • Months Data Filters: First/Latest Supplement: Select a First & Unsupplemented or Latest & Unsupplemented from the drop-down. Estimate only? Select to view Estimates and/or	• We	Date  Data  Data  Absolute				
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Saving a 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 Dashboard View 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.				
	Data Sources   Q = AU AU AU AU AU AU AU AU AU AU				
2	Enter a <b>name</b> for the view in the <b>Name this view</b> field.				
3	<ul> <li>Use the following checkboxes to adjust the views settings:</li> <li>Make it my default: Select to make the settings your default view when opening the dashboard.</li> <li>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.</li> </ul>	Custom Views O2 Save Custom View Name this view Dashboard View 1 Make it my default Make visible to others O3 My Views O4 Nothing saved yet			
4	Select <b>Save</b> , the custom dashboard is now completed and will now appear in the My Views area of the Custom View dialog box.	Other Views II Original (default) Administrator			

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

Step	Action				
1	Select <b>Share</b> from the Tableau menu, the <b>Share View</b> dialog box opens.				
	🖰 Data Sources   Q 📑 ? 🛆 🗛				
	🕀 Ask Data 🕼 View: Original 🛆 Alerts 🖂 Metrics 🖾 Subscribe 😋 Share 🖵 Download 🗔 Full Screen				
2	Enter the <b>name</b> of the person in your organization to share the view with.				
3	Select <b>Share</b> when complete, the custom dashboard is now completed and the person will review a notification that a view has been shared with them.				



Exporting The dashboard provides users with the ability to download data present in Dashboard Data 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	Select the <b>Download</b> button in t	he dashboard toolba	ar.
	🕕 Ask Data 🕕 View: Original 🛆 Alerts	🕞 Data Sources	s   Q 📑 ⑦ 🏠 AU
2	Choose an export option. To dow	vnload the csv	
-	file select <b>Crosstab</b> .		Download X
			Select your file format.
			Image
			Data
			Crosstab
			PDF
			PowerPoint
			Tableau Workbook
3	Select a <b>sheet</b> from the	Download Crosstab	
	Download Crosstab dialog		03
	box.	Select a sheet from this da	shboard
	<b>Note:</b> Sheets of interest have a "*" prefix. Breakout 1 is the top bar chart; Breakout 2 is	*Breakout 1 *Breakout 2	2 *KPI 1 Line Ch *KPI 2 Line C *KPI 3 Line (
	five-line charts are KPI 1-5.	<	>
			04 Download
4	Select <b>Download</b> , from the Down your computer's downloads sect	nload Crosstab dialc tion.	og box. Open the .csv file from



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. <b>Note:</b> Select any selected bar or line chart item again to deselect it.
4	Select the <b>Revert</b> button to undo all actions and revert the dashboard back to the default view.
5	Select the <b>Undo</b> button to undo actions one at a time.





#### **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-reinpsection, 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.

#### 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.

