

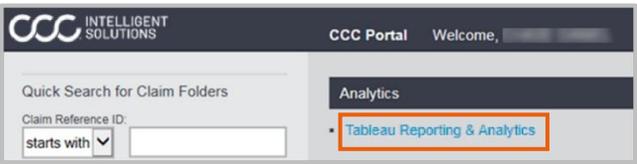
Estimate Review Line Detail Insights Dashboard

Overview This job aid reviews the key features and design of the **Estimate Review Line Detail Insights Dashboard**. This dashboard was created to help understand Line-Level behaviors by appraisers and reviewers regarding the accuracy of writing an estimate. It allows managers and individuals to see cost savings of reinspection teams and the accuracy of their appraisers.

The Estimate Review Line Detail dashboard helps address these use cases:

- Allows for a more granular study into Line Level Estimate Review Data.
- Allows reviewer managers to compare how their team is performing against the average.
- Reviewer managers can compare how individual reviewers are performing against their teammates.
- View how many reviews were completed and the associated cost savings, broken out by appraiser, appraiser state, appraiser type, etc.
- Analyze trends over time by specific metrics or breakout attributes.
- Identify claims that require action as identified through the dashboard.

Access Estimate Review Line Detail Insights Dashboard Follow the steps below to access the Estimate Review Line Detail Insights Dashboard via the CCC® Portal.

Step	Action
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 drop-down.
5	Select the Estimate Review Line Detail Insights Dashboard .

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Estimate Review Line Detail Insights Dashboard, Continued

Dashboard Filters



- Displays the **Date Range** based on the selection from the Date filter.
- The **Data Last Refreshed** indicates the last date and time the data was refreshed in the dashboard.
- The **Hide/Show Trends** toggle hides/shows the left-side trends panel.
- Select the **Book** icon to view the glossary.
- Select the **Question Mark** icon to enable a help overlay for dashboard tips.

Note: When available click **Apply** to set the changes to the selection made.

Vehicle Filters:

Stage	Description
1	Displays the Vehicle Type filter options.
2	Displays the Vehicle Condition filter options.
3	Displays the Vehicle Body Style filter options.

Vehicle Filters

Vehicle Type (All)	Vehicle Source (All)
Vehicle Condition (All)	Vehicle Year (All)
Vehicle Body Style (All)	Vehicle Door Style (All)

Hierarchy Filters:

Stage	Description
1	Displays the Reviewer Hierarchy filter options.
2	Displays the Appraiser Management Hierarchy filter options.
3	Displays the Appraiser Claim Office Hierarchy filter options.
4	Displays the Staff Claim Office Hierarchy filter options.

Hierarchy Filters

Reviewer

Reviewer Mgmt Level 1 Unknown (0)	Reviewer Mgmt Level 2 Unknown (0)
Reviewer Mgmt Level 5 Unknown (0)	Reviewer Mgmt Level 6 0 (Unknown)

Appraiser Management

Appraiser Mgmt Level 1 Unknown (0)	Appraiser Mgmt Level 2 Unknown (0)
Appraiser Mgmt Level 5 Unknown (0)	Appraiser Mgmt Level 6 Unknown (0)

Appraiser Claim Office

Claim Office Level 1 Unknown (0)	Claim Office Level 2 Unknown (0)
Claim Office Level 5 Unknown (0)	Claim Office Level 6 Unknown (0)

Staff Claim Office

Staff Claim Office Level 1 Unknown (0)	Staff Claim Office Level 2 Unknown (0)
Staff Claim Office Level 5 Unknown (0)	Staff Claim Office Level 6 Unknown (0)

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Estimate Review Line Detail Insights Dashboard, Continued

Dashboard
Filters,
continued
Date Filters:

Stage	Description
1	Anchor Date Selection: Select a specific date for the selection chosen.
2	Date Range Selection: Select either a Custom Date Range or a Fixed Date Range .
3	Custom Date Range: Select a Rolling, Current, Prior , etc. date range option, when the Date Range Selection dropdown option Custom Date Range is selected.
4	Start/End Date Picker: Enter or select a Fixed date from the fields, when the Date Range Selection dropdown option Fixed Date Range is selected.

Date Filters

Anchor Date

Date Range Selection

Custom Date Range

Start Date End Date

Data Filters:

Stage	Description
1	The Claim filter options allow you to change the type of claim data displayed in the dashboard.
2	The Review filter options allow you to filter by files that have been or are in need of review.
3	The Reason and MOR Filters options allow you to filter by estimate reason and MOR (Method of Reinspection).
4	The Appraiser/Reviewer filter options allow you to filter by appraiser's name and information.

Data Filters

Claim

Claim Category Claim Type

MOI Inspection Type MOI Standard Group

Review

First / Latest Supplement Supplement Status

Reviewed File Type Reviewed File Version

Reason and MOR Filters

Reason 1 Reason 2

MOR Group MOR Type

Appraiser / Reviewer

Appraiser Type Appraiser State

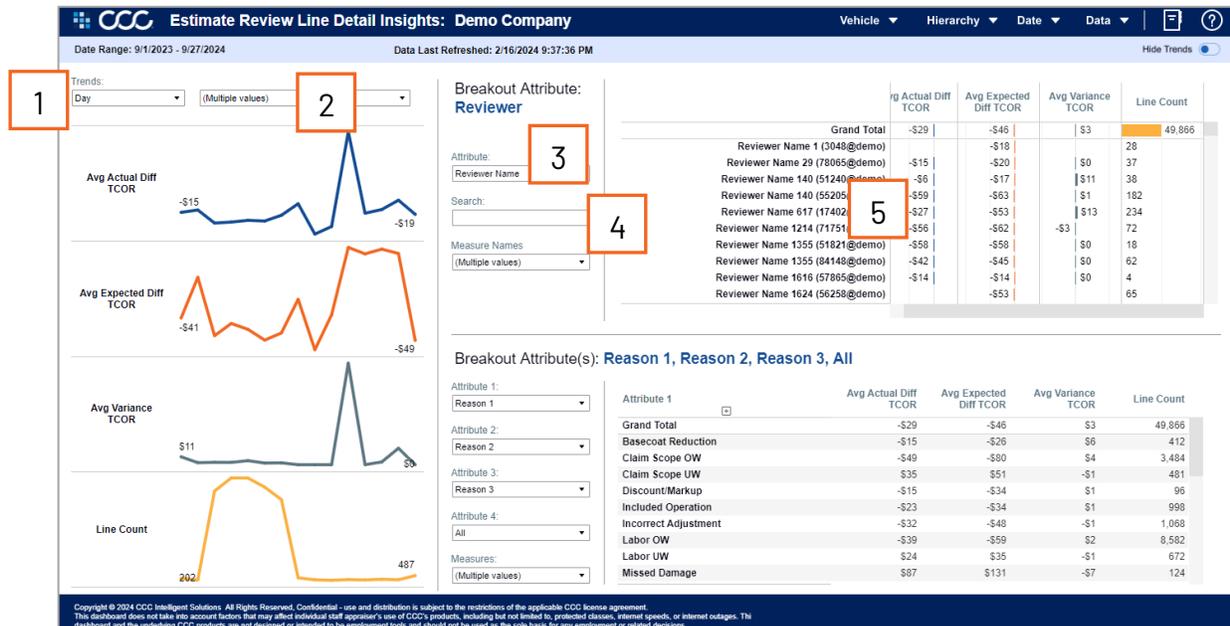
Secondary Company Name

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Estimate Review Line Detail Insights Dashboard, Continued

Estimate Review Line Detail Insights Summary

The Estimate Review Line Detail Insights tab allows users to select multiple KPIs to trend over time as well as a variety of KPIs broken down by reviewers, appraisers, etc.



Stage	Description
1	Trends can be filtered by Totals or one of the available time increments. Note: Hide Trends as needed by selecting the Toggle in the upper-right corner.
2	Select Multiple values under the Measures drop-down and click Apply to view results.
3	Breakout Attributes include filters such as Appraiser, Claim Types, Salvage Coordinator, and Vehicle Information.
4	The Search drop-down allows for including or excluding Attributes.
5	The options selected from the Measures drop-down are displayed in graph format.

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Estimate Review Line Detail Insights Dashboard, Continued

Review Detail Summary

The **Review Detail** tab provides users a Line Level crosstab of Review Detail that can be downloaded as an Excel/CSV and selectable measures.

1 Show Crosstab
 Yes
 No

2 Total Rows
49,866

3 Measures
(Multiple values)

4 [Row in Data Table]

5 Download Crosstab

Claim Number	Reviewed File Version	Line Description	Appraiser Name + ID	Appraiser Type	Reviewer Name + ID	Claim Type Detail Description
Claim 2	E01	Pre-repair scan	Appraiser Name 91111 (Appraiser Logon Id)	DRP	Reviewer Name 70764 (11436@demo)	Utility Vehicle
Claim 3	S02	Nameplate "PRIUS"	Appraiser Name 22944 (Appraiser Logon Id)	DRP	Reviewer Name 88994 (2341@demo)	Car
Claim 3	S02	Emblem	Appraiser Name 22944 (Appraiser Logon Id)	DRP	Reviewer Name 88994 (2341@demo)	Car
Claim 3	S02	Nameplate "HYBRID SYNERGY DRIVE" w	Appraiser Name 22944 (Appraiser Logon Id)	DRP	Reviewer Name 88994 (2341@demo)	Car
Claim 3	S02	Tint Color to Match	Appraiser Name 22944 (Appraiser Logon Id)	DRP	Reviewer Name 88994 (2341@demo)	Car
Claim 7	S01	R&I bumper assy	Appraiser Name 5528 (Appraiser Logon Id)	DRP	Reviewer Name 104394 (44258@demo)	Car
Claim 7	S01	LT Door shell (ALU)	Appraiser Name 5528 (Appraiser Logon Id)	DRP	Reviewer Name 104394 (44258@demo)	Car
Claim 7	S01	Partial Refinish Adjustment	Appraiser Name 5528 (Appraiser Logon Id)	DRP	Reviewer Name 104394 (44258@demo)	Car
Claim 7	S01	LT Door shell (ALU)	Appraiser Name 5528 (Appraiser Logon Id)	DRP	Reviewer Name 104394 (44258@demo)	Car
Claim 7	S01	Partial Refinish Adjustment	Appraiser Name 5528 (Appraiser Logon Id)	DRP	Reviewer Name 104394 (44258@demo)	Car
Claim 7	S01	LT Quarter panel	Appraiser Name 5528 (Appraiser Logon Id)	DRP	Reviewer Name 104394 (44258@demo)	Car
Claim 7	S01	Partial Refinish Adjustment	Appraiser Name 5528 (Appraiser Logon Id)	DRP	Reviewer Name 104394 (44258@demo)	Car
Claim 7	S01	Basecoat Reduction	Appraiser Name 5528 (Appraiser Logon Id)	DRP	Reviewer Name 104394 (44258@demo)	Car
Claim 15	E01	Hood (ALU)	Appraiser Name 64778 (Appraiser Logon Id)	DRP	Reviewer Name 42320 (43851@demo)	Utility Vehicle
Claim 17	S01	RT Fender (HSS)	Appraiser Name 50355 (Appraiser Logon Id)	DRP	Reviewer Name 61464 (43274@demo)	Utility Vehicle
Claim 17	S01	Overlap Major Adj, Panel	Appraiser Name 50355 (Appraiser Logon Id)	DRP	Reviewer Name 61464 (43274@demo)	Utility Vehicle
Claim 17	S01	Partial Refinish Adjustment	Appraiser Name 50355 (Appraiser Logon Id)	DRP	Reviewer Name 61464 (43274@demo)	Utility Vehicle
Claim 17	S01	LT Fender (HSS)	Appraiser Name 50355 (Appraiser Logon Id)	DRP	Reviewer Name 61464 (43274@demo)	Utility Vehicle
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Claim 17	S01	Partial Refinish Adjustment	Appraiser Name 50355 (Appraiser Logon Id)	DRP	Reviewer Name 61464 (43274@demo)	Utility Vehicle

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Stage	Description
1	Select Yes from the Show Crosstab section to display the Review Detail Dashboard data.
2	The Total Rows area displays the count of records in the Data Details section.
3	Use the Measures dropdown to select specific measures to display in the Detail Data grid.
4	The Detail Data section shows all the attributes/data points that reference the request.
5	Click Download Crosstab to download the Detail Data in an Excel or CSV format.

Estimate Review Line Detail Insights Dashboard, Continued

Adhoc/Manual Reviews Summary

The **Adhoc/Manual Reviews** tab provides users a Line Level crosstab of Adhoc/Manual Review Detail that can be downloaded as an Excel/CSV and selectable measures.

CCC Estimate Review Line Detail Insights: Demo Company

Date Range: 9/1/2023 - 9/27/2024 Data Last Refreshed: 2/16/2024 9:37:36 PM

1 Show Crosstab: Yes No

2 Total Rows: 49,866

3 Measures: (Multiple values)

5 Download Crosstab

Claim Number	Reviewed File Version	Line Description	Appraiser Name + ID	Appraiser Type	Reviewer Name + ID	Claim Type Detail Description
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5	Click Download Crosstab to download the Detail Data in an Excel or CSV format.