

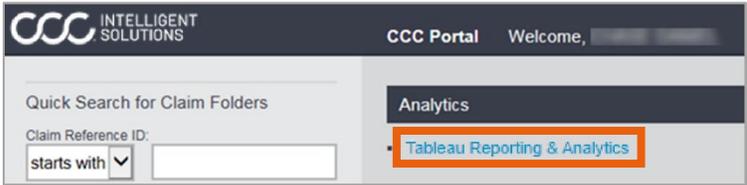
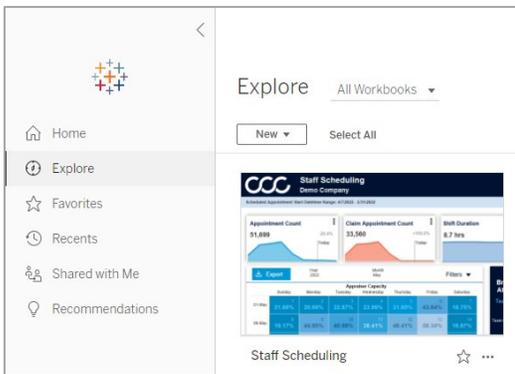
Staff Scheduling Dashboard

Introduction The **Staff Scheduling** dashboard allows you to view utilization and results of the CCC Scheduling application across customizable time periods, data attributes, and company hierarchies.

This dashboard allows you to do the following:

- Measure utilization of the CCC Scheduling tool across different areas of the company or claim types.
- Understand capacity rates of selected teams by day.
- Identify teams or claim types with high cancellation rates or appointment durations exceeding the company average or expectations.
- Identify teams or claim types with low turn-around times between appointment and file upload.

Access Staff Scheduling 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 Staff Scheduling Dashboard . 

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Staff Scheduling Dashboard, Continued

Dashboard Filters



Question Mark and **Book** icon:

- Select the **Question Mark** icon to enable a help overlay for dashboard tips. Select the **Book** icon to open the dashboard glossary.

Note: Click **Apply** to set the changes to the selection made.

Claim Office Hierarchy Filter

Stage	Description
1	Appraiser Hierarchy Level: Select an Appraiser(s) from the list of options to filter by this selection.
2	Appointment Created By Hierarchy: Select the individual(s) who created the assignment from the list of options to filter by this selection.



Date Filters

Stage	Description
1	Anchor Date: Select an anchor date option from the list choices.
2	Date Range Section: Select either Rolling or Fixed Date Range .
3	Rolling Date Range: Select a rolling date range of: <ul style="list-style-type: none"> • 3 Months • 6 Months • 9 Months • 1 Year • 18 Months • 2 Years
4	Start Date/ End Date: Select or Enter a Start and End Date .
5	Trend Chart Level of Detail: Select a trend duration of: <ul style="list-style-type: none"> • Year • Quarter • Month • Week



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Staff Scheduling Dashboard, Continued

Dashboard Filters, continued

Data Filters

Note: Click **Apply** to set the changes to the selection ma

Stage	Description
1	Activity Type: Select one or multiple Activity types.
2	After Appointment MOI Appraiser Type Description: Select Independent Appraiser, Repair Facility, Staff Appraiser, and/or Unknown.
3	Appointment Type: Select one or multiple Appointment types.
4	Appointment Status: Select Booked, Cancelled, Finished-inspection, No show, Started-inspection, and/or Traveling.
5	Appraiser Job Status: Select one or multiple Appraiser Job Statuses.
6	Appraiser Skills: Select one or multiple Appraiser Skills.
7	Vehicle Location State Code: Select one or multiple Vehicle Location States.
8	Team Name: Select one or multiple Team Names.
9	Shift Name: Select one or multiple Shift Names.
10	Claim Appointment File Type: Select Estimate, Supplement, and/or NA.
11	Loss Category Description: Select Collison, Comprehensive, Liability, and/or Other.

Data Filters

Activity Type
(All) ▾

After Appointment MOI Appraiser Type Description
(All) ▾

Appointment Type
(All) ▾

Appointment Status
(All) ▾

Appraiser Job Title
Appraiser ▾

Appraiser Skills
(All) ▾

Vehicle Location State Code
(All) ▾

Team Name
(All) ▾

Shift Name
(All) ▾

Claim Appointment File Type
(All) ▾

Loss Category Description
(All) ▾

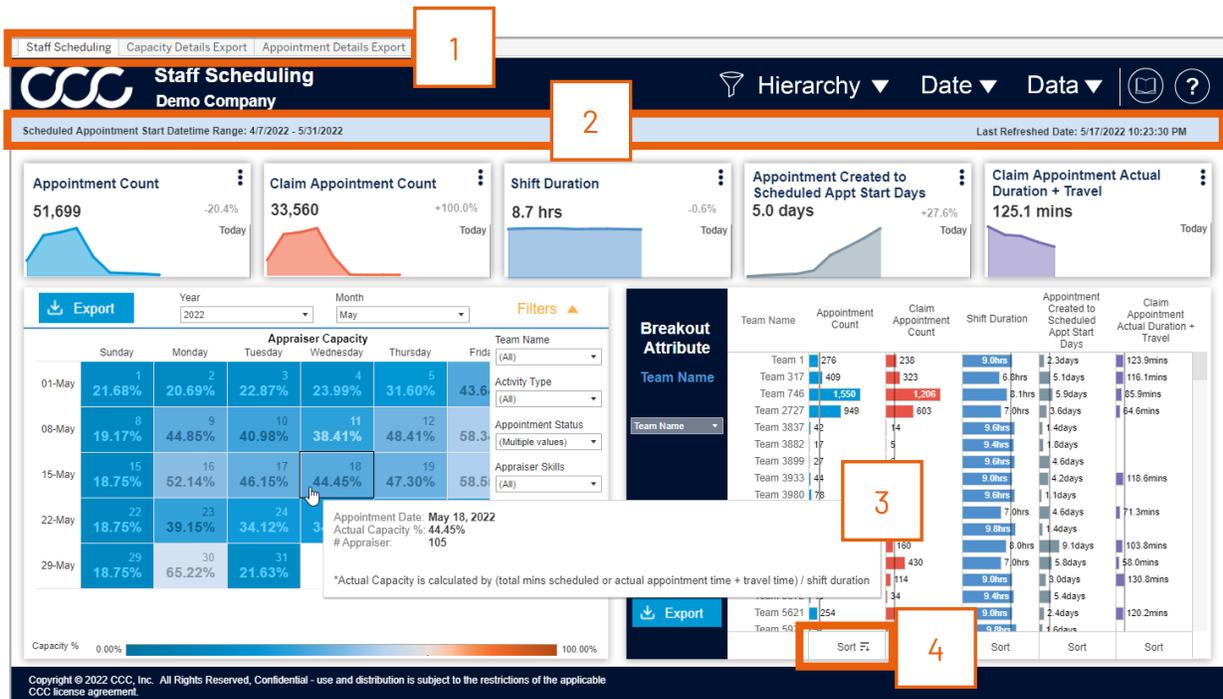
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Staff Scheduling Dashboard, Continued

Dashboard Navigation

Stage	Description
1	Select the tabs to switch between dashboard views.
2	<ul style="list-style-type: none"> • Claim Folder Create Date Range: Displays the Start/End date selected from the Date filter. • Date Last Refreshed: Displays the Date/Time the data was last refreshed.
3	Hover over dashboard elements to view additional details such as Actual Capacity % and # Appraiser .
4	Click Sort to sort the column in Ascending or Descending order or View Data . 



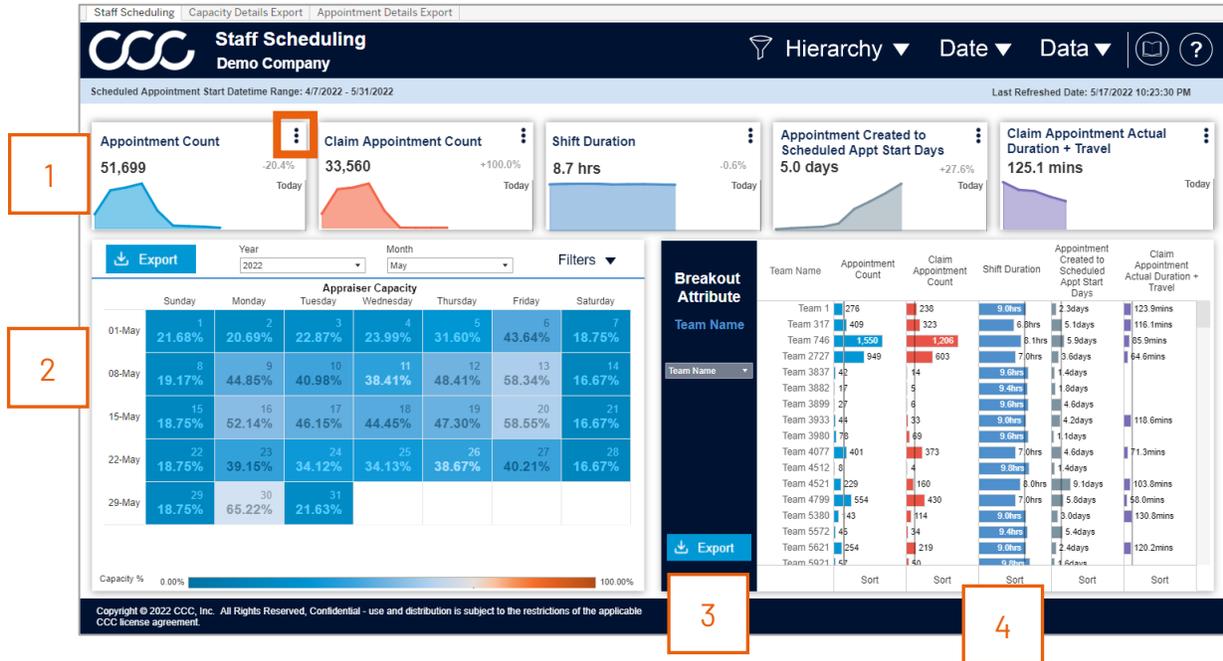
The screenshot shows the Staff Scheduling Dashboard for Demo Company. It features a top navigation bar with tabs for 'Staff Scheduling', 'Capacity Details Export', and 'Appointment Details Export'. Below the navigation bar, there are several summary cards for Appointment Count (51,699), Claim Appointment Count (33,560), Shift Duration (8.7 hrs), Appointment Created to Scheduled Appt Start Days (5.0 days), and Claim Appointment Actual Duration + Travel (125.1 mins). A central table displays 'Appraiser Capacity' by date (01-May to 29-May) and team name. A 'Breakout Attribute' panel is visible on the right. A table on the far right lists team names and their corresponding metrics for Appointment Count, Claim Appointment Count, Shift Duration, Appointment Created to Scheduled Appt Start Days, and Claim Appointment Actual Duration + Travel. A 'Sort' dropdown menu is shown at the bottom right of this table.

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Staff Scheduling Dashboard, Continued

Staff Scheduling Dashboard



Stage	Description
1	This section displays a trendline and month-over-month variance for five Key Performance Indicators (KPIs). Click the ellipsis in the top right of each KPI box to change the metric shown.
2	View staff capacity percentage by Day for the currently selected time-period (<i>Month and Year</i>) and dashboard filters selected. The calendar can be further filtered by teams, territory, skills, etc. by selecting options in the Filter menu. Click the Export button to export data for the current selection, clicking this will navigate you to the Capacity Details Export tab.
3	Select a breakout attribute from the drop-down for the accompanying bar charts. Click the Export button to export data for the current selection, clicking this will navigate you to the Appointment Details Export tab.
4	Displays the selected breakout attribute and metric combinations.

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Staff Scheduling Dashboard, Continued

Staff Scheduling Export

The **Capacity Details Export** and **Appointment Details Export** tabs display the following:

Note: The example below shows the Capacity Details Export tab.

Stage	Description
1	<p>Capacity Details Export tab:</p> <ul style="list-style-type: none"> Shows the Scheduled Appointment Start Date selected in the Appraiser Capacity section on the Staff Scheduling dashboard. <p>Appointment Details Export tab:</p> <ul style="list-style-type: none"> Shows the Scheduled Appointment Start Datetime Range selected in the Date filter.
2	<p>Capacity Details Export tab:</p> <ul style="list-style-type: none"> Select Yes to display the Appraiser Capacity data. <p>Appointment Details Export tab:</p> <ul style="list-style-type: none"> Select Yes to display the Appointment Details data.
3	<p>Select Download Crosstab, then select a sheet from the dashboard and click Download to download the data in either an Excel® or CSV format. The file will appear in computers downloads folder.</p>

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