## **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		Descri	ption								
1	Enter your <b>User ID</b> and <b>Password</b> to login to the CCC <sup>®</sup> 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 <b>Explore</b> on the left s	ide panel.		<							
4	Select <b>All Workbooks</b> fro dropdown.	m the	Home	Explore All Workbooks • New • Select All							
5	Select the <b>Staff Scheduli</b> <b>Dashboard</b> .	ng	☆ Favorites ① Recents ૡૈક Shared with Me ♀ Recommendations	Staff Scheduling	R Duration fars tars tars tars tars tars tars tars t						



#### **Dashboard Filters**

Staff Scheduling Capacity Details Export Appointment Details Export	
Staff Scheduling Demo Company	🦻 Hierarchy ▼ Date ▼ Data ▼ 🖾 ?
Scheduled Appointment Start Datetime Range: 4/7/2022 - 5/31/2022	Last Refreshed Date: 5/17/2022 10:23:30 PM

#### 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:											
	• 3 Months • 6 Months • 9 Months											
	• 1 Year • 18 Months • 2 Years											
4	Start Date/ End Date: Select or Enter a Start											
	and <b>End Date</b> .											
5	Trend Chart Level of Detail: Select a trend											
	duration of:											
	• Year • Quarter • Month • Week											



Date Filters	
Anchor Date	
Scheduled Appointment S	tart Datetime
Date Range Selection	
Fixed Date Range	•
Rolling Date Range	
3 Months	•
Start Date	End Date
4/7/2022	5/31/2022
Trend Charts Level of Del	ail
Week	



#### Dashboard Filters, continued

Data Filt	ters	Data Filters
Note: C	lick <b>Apply</b> to set the changes to the selection ma	Activity Type
Stage	Description	After Appointment MOI Appraiser Type Description
1	<b>Activity Type:</b> Select one or multiple Activity types.	(All) * Appointment Type (All) *
2	After Appointment MOI Appraiser Type Description: Select Independent Appraiser, Repair Facility, Staff Appraiser, and/or Unknown.	Appointment Status (All) * Appraiser Job Title Appraiser *
3	<b>Appointment Type:</b> Select one or multiple Appointment types.	Appraiser Skills (All) Vehicle Location State Code
4	Appointment Status: Select Booked, Cancelled, Finished-inspection, No show, Started- inspection, and/or Traveling.	(All) * Team Name (All) *
5	<b>Appraiser Job Status:</b> Select one or multiple Appraiser Job Statuses.	Shift Name (All) *
6	Appraiser Skills: Select one or multiple Appraiser Skills.	(All) * Loss Category Description
7	Vehicle Location State Code: Select one or multiple Vehicle Location States.	(All) *
8	<b>Team Name:</b> 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.	

#### **Dashboard Navigation**

Stage	Description											
1	Select the <b>tabs</b> to switch between dashboard views.											
2	Claim Folder Create Date Range: Displays the Start/End date selected from											
	<ul> <li>Date Last Refreshed: Displays the Date/Time the data was last refreshed.</li> </ul>											
3	Hover over dashboard elements to view additional details such as Acutal											
	Capacity % and # Appraiser.											
4	Click Sort to sort the column in <b>Ascending</b> or											
	Descending order or View Data.											



#### **Staff Scheduling Dashboard**

Schedu	led Appointment St	art Datetime Rar	nge: 4/7/2022 -	5/31/2022								Last Refresh	ed Date: 5/17/2	2022 10:23:30
Арр 51,6	ointment Coun	t -20.4 To	Clair 33,5 oday	n Appointm i60	ent Count +1	100.0% Today	Shift Duration 8.7 hrs	-0.6% Today	Appointmen Scheduled A 5.0 days	nt Created Appt Star	d to t Days +27.6% Toda	Claim Duratio 125.1	Appointmen on + Travel mins	nt Actual
ىك	Export	Year 2022		▼ Month		•	Filters 🔻	Breakout	Team Name Ap	pointment Count	Claim Appointment	Shift Duration	Appointment Created to Scheduled	Claim Appointme Actual Durat
	Sunday	Monday	Appra Tuesday	iser Capacity Wednesday	Thursday	Friday	Saturday	Attribute	Team 4		Count	0.01	Appt Start Days	Travel
01-0	1 Aay 21.68%	2 <b>20.69%</b>	3 <b>22.87%</b>	4 23.99%	5 <b>31.60%</b>	6 <b>43.64</b> %	7 18.75%	Team Name	Team 317	1,550	323 1,206	6.8hrs 8.1hrs	5.1days 5.9days	116.1mins 85.9mins
08-1	<sup>8</sup> 19.17%	9 <b>44.85%</b>	10 <b>40.98%</b>	11 38.41%	12 <b>48.41%</b>	13 58.34%	14 <b>16.67%</b>	Team Name 💌	Team 2727 Team 3837 42 Team 3882 17	949	603 14 5	7/0hrs 9.6hrs 9.4hrs	3.6days 1.4days 1.8days	64.6mins
15-0	<sup>15</sup> 18.75%	16 <b>52.14%</b>	17 <b>46.15%</b>	18 <b>44.45%</b>	19 <b>47.30%</b>	20 58.55%	21 <b>16.67%</b>		Team 3899   27 Team 3933   44		6 33	9.6hrs 9.0hrs	4.6days 4.2days	118.6mins
22-1	<sup>22</sup> 18.75%	23 <b>39.15%</b>	24 <b>34.12%</b>	25 <b>34.13%</b>	26 <b>38.67%</b>	27 <b>40.21%</b>	28 <b>16.67%</b>		Team 3980 78 Team 4077 4 Team 4512 8	401	69 373 4	9.6hrs 7.0hrs 9.8hrs	1.1days 4.6days 1.4days	71.3mins
29-1	<sup>29</sup> 18.75%	30 65.22%							Team 4521 22 Team 4799 Team 5380 44	9 554 3	160 430 114	8.0hrs 7.0hrs 9.0hrs	9.1days 5.8days 3.0days	103.8mins \$8.0mins 130.8mins
								🕹 Export	Team 5572 45 Team 5621 25 Team 5921 57	54	34 219 50	9.4hrs 9.0hrs 9.8hrs	5.4days 2.4days 1.6days	120.2mins

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 <b>Filter</b> menu. Click the <b>Export</b> button to export data for the current selection, clicking this will navigate you to the Capacity Details Export tab.	Filters A Team Name (AII) • Activity Type (AII) • Appointment Status (Multiple values) • Appraiser Skills (AII) •							
3	Select a breakout attribute from the drop-down for the accompany charts. Click the <b>Export</b> button to export data for the current selection, clic	ing bar cking this							
	will navigate you to the Appointment Details Export tab.								
4	Displays the selected breakout attribute and metric combinations.								



#### **Staff Scheduling Export**

	Staff So Demo Co	cheduli mpany	ng Exp	ort				🖓 Hierar	rchy 🔻 🛛	Date ▼	Data	•
led Appointment Sta	rt Date: May 2	022	1							Last Refre	shed Date: 5/	17/2022 10:23:30 P
Show Crosstab • Yes No	2									3	Down	load Crosstab
							Capacity Details Export					
est_appt_strt_dttm	Team ID	Appraiser Name	Appraiser ID	Appraiser Hierarchy Level 2	Appraiser Hierarchy Level 3	Shift Duration in Min	Appointment Count	Claim Appointment Count	Non-Claim Appointme Cou	ent Claim A unt Actualize	ppointment d Capacity	Non-Claim Appoint Actualized Cap
5/1/2022 1:16:46 A	Team 15117	Appraiser 36.	36543	Unknown (0)	Unknown (0)	480	1	1		0	0	
5/1/2022 1:17:14 A	Team 15117	Appraiser 36.	36543	Unknown (0)	Unknown (0)	480	1	1		0	0	
5/1/2022 12:00:00	Team 70692	Appraiser 57.	57639	Unknown (0)	Unknown (0)	480	1	0		1	0	
5/1/2022 12:41:21	Team 15117	Appraiser 39.	39638	Unknown (0)	Unknown (0)	480	1	1		0	86	
5/1/2022 1:00:00	Team 17088	Appraiser 72.	7238	Unknown (0)	Unknown (0)	480	1	0		1	0	
PM		Appraiser 40.	40366	Unknown (0)	Unknown (0)	480	1	0		1	0	
		Appraiser 62.	62858	Unknown (0)	Unknown (0)	480	1	0		1	0	
	Team 59821	Appraiser 53.	53902	Unknown (0)	Unknown (0)	480	1	0		1	0	
5/1/2022 1:08:00 P	Team 15575	Appraiser 15.	15626	Unknown (0)	Unknown (0)	480	1	1		0	124	
5/1/2022 1:12:00 P	Team 15575	Appraiser 85.	8502	Unknown (0)	Unknown (0)	480	1	1		0	141	
5/1/2022 1:53:33 P	Team 14782	Appraiser 18.	18162	Unknown (0)	Unknown (0)	480	1	1		0	85	
5/1/2022 2:21:20 P	Team 15575	Appraiser 48.	48540	Unknown (0)	Unknown (0)	480	1	1		0	159	
5/1/2022 2:45:38 P	Team 16691	Appraiser 29.	29849	Unknown (0)	Unknown (0)	480	1	1		0	94	
5/1/2022 3:00:00 P	Team 70692	Appraiser 57.	57639	Unknown (0)	Unknown (0)	480	1	0		1	0	
5/1/2022 3:11:11 P	Team 15117	Appraiser 68.	68104	Unknown (0)	Unknown (0)	480	1	1		0	130	
5/1/2022 3:30:46 P	Team 74789	Appraiser 60.	60468	Unknown (0)	Unknown (0)	540	1	1		0	125	
5/1/2022 3:43:23 P	Team 74789	Appraiser 60.	60468	Unknown (0)	Unknown (0)	540	1	1		0	113	
5/1/2022 3:45:46 P	Team 15117	Appraiser 68.	68104	Unknown (0)	Unknown (0)	480	1	1		0	112	
5/1/2022 3:49:00 P	Team 15575	Appraiser 20.	20680	Unknown (0)	Unknown (0)	480	1	1		0	71	
L												

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## 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	<ul> <li>Capacity Details Export tab:</li> <li>Shows the Scheduled Appointment Start Date selected in the Appraiser Capacity section on the Staff Scheduling dashboard.</li> <li>Appointment Details Export tab:</li> <li>Shows the Scheduled Appointment Start Datetime Range selected in the Date filter.</li> </ul>										
2	<ul> <li>Capacity Details Export tab:</li> <li>Select Yes to display the Appraiser Capacity data.</li> <li>Appointment Details Export tab:</li> <li>Select Yes to display the Appointment Details data.</li> </ul>										
3	Select <b>Download Crosstab</b> , then select a <b>sheet</b> from the dashboard and click <b>Download</b> to download the data in either an <b>Excel</b> <sup>®</sup> or <b>CSV</b> format. The file will appear in computers downloads folder.										

