

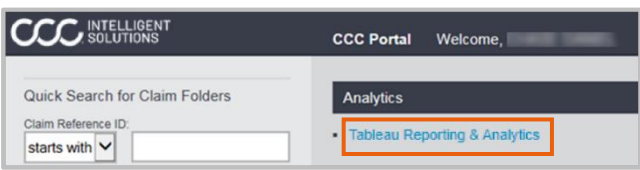
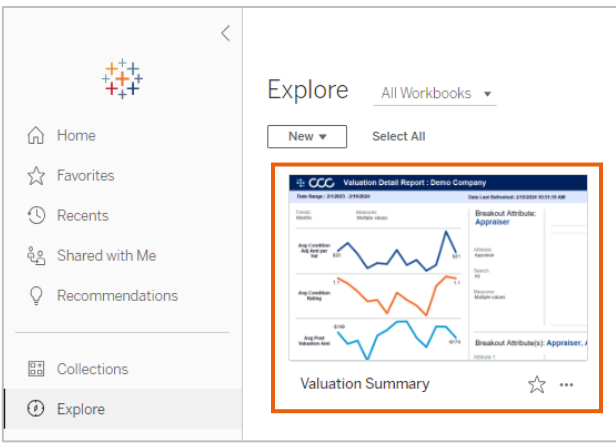
Valuation Detail Report

Overview

This job aid reviews the key features and design of the **Valuation Detail Report**. Select from the section tabs of Valuation Summary or Claim Breakdown, and filter data to view lien requests and valuation details, refreshed daily.

Access Valuation Detail Report

Follow the steps below to access the Valuation Detail report 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 Valuation Summary Dashboard. 


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Valuation Detail Report, Continued



Dashboard Filters

Valuation Summary

Claim Breakdown

 Valuation Detail Report : Demo Company

Hierarchy ▾ Date ▾ Data ▾

Date Range : 1/1/2024 - 2/23/2024

Data Last Refreshed: 2/19/2024 4:51:19 PM

Hide Trends ☐

- 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.

Hierarchy Filters:

Stage	Description
1	Displays the Submitter Level Hierarchy filter options.
2	Displays the Last Post Val Submitter Hierarchy filter options.

Hierarchy Filters

Submitter Level Hierarchy

Submitter Level 1 Name

Unknown ▾

Submitter Level 2 Name

Unknown ▾

Submitter Level 3 Name

Unknown ▾

Submitter Level 4 Name

Unknown ▾

Submitter Level 5 Name

Unknown ▾

Submitter Level 6 Name

Unknown ▾

Submitter Level 7 Name

Unknown ▾

Last Post Val Submitter Hierarchy

Last Post Val Submitter Level 1 Name

Unknown ▾

Last Post Val Submitter Level 2 Name

Unknown ▾

Last Post Val Submitter Level 3 Name

Unknown ▾

Last Post Val Submitter Level 4 Name

Unknown ▾

Last Post Val Submitter Level 5 Name

Unknown ▾

Last Post Val Submitter Level 6 Name

Unknown ▾

Last Post Val Submitter Level 7 Name

Unknown ▾

Date Filters:

Stage	Description
1	Date Range Selection: Select either a Custom Date Range or a Fixed Date Range .
2	Custom Date Range: Select a Rolling , Current , Prior , etc. date range option, when the Date Range Selection dropdown option Custom Date Range is selected.
3	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

Date Range Selection

Custom Date Range ▾

Custom Date Range

Rolling 1 Month ▾

Start Date

1/1/2023

End Date

1/17/2023

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Valuation Detail Report, Continued

Dashboard Filters, continued

Data Filters:

Stage	Description
1	The Claim filter options allow you to change the type of claim data displayed in the dashboard.
2	The Individual filters allows you to select which individuals to display in the dashboard who were involved with the claim.
3	The Valuation filter options allow you to select the types valuation related details to displayed in the dashboard.
4	The Vehicle filter options allow you to change the types of vehicles displayed in the dashboard.

Data Filters

Claim

Claim Type (All) Claim Category (All) Claim Type Detail (All)

Individuals

Adjuster (All) Appraiser (All) Settlement Adjuster Sett Adjuster 1 Submitter (All) Valuation User (All)

Valuation

Valuation Type (All) Condition Baseline (All) Settlement Type (All) Odometer Range (All) Severity Range Group (All)

Loss Category (All) Loss Unit Type (All) Loss Type (All) Loss CBSA (All) Refurbished (All)

Vehicle Owner State (All) Vehicle Age (All) Vehicle Age Group (All) Leased Vehicle (All) Lien (All)

Total Loss (All) Third Party (All) Post Val (All) Salvage (All) Branded Title (All)

Valuation Status Completed Build Sheet Flag (All) Fee Status (All)

Vehicle

Vehicle Source (All) Vehicle Make (All) Vehicle Model (All)

Vehicle Year (All) Vehicle Manufacturer (All) Vehicle Type (All)

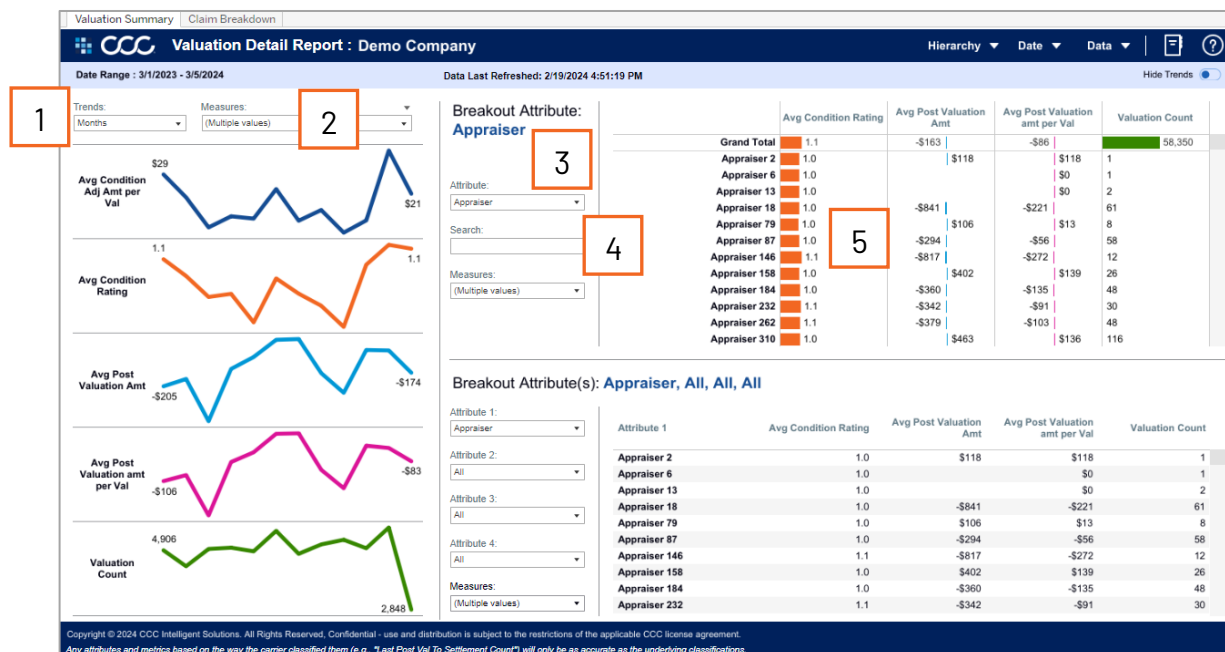
Company Company Secondary Company Name Secondary Company

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Valuation Detail Report, Continued

Valuation Summary

The **Valuation Summary** tab gives insight to appraisers and reviewers regarding the accuracy of performing valuations. This allows the carrier to aggregate/summarize up to four different attributes and identify trends.



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 Adjuster, Appraiser, Claim Types, Vehicle Information, and Time Frames.
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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Valuation Detail Report, Continued

Claim Breakdown

Select filters and time periods in the **Claim Breakdown** tab to view performance.

The screenshot shows the 'Valuation Detail Report' for 'Demo Company'. The interface includes a top navigation bar with 'Valuation Summary' and 'Claim Breakdown' tabs. Below the header, there's a 'Date Range' of '12/1/2023 - 3/5/2024' and a 'Data Last Refreshed' timestamp of '2/19/2024 4:51:19 PM'. The main section contains a 'Show Crosstab' section with radio buttons for 'Yes' (selected) and 'No'. To the right of this is a 'Total Rows' count of '13,521' and a 'Measures' dropdown menu set to '(Multiple values)'. A 'Download Crosstab' button is located on the far right. Below these controls is a large data grid with columns: 'Adjuster Name', 'Adjuster Id', 'Appraiser Name', 'Appraiser Id', 'Submitter Name', 'Settlement Adjuster Name', 'Valuation User Name', 'Claim Category Desc', and 'Claim'. The grid lists various adjusters and their associated appraisers and submitters. Numbered callouts 1 through 5 point to the 'Show Crosstab' section, 'Total Rows' count, 'Measures' dropdown, 'Download Crosstab' button, and a specific row in the data grid respectively.

Stage	Description
1	Select Yes from the Show Crosstab section to display the Valuation Detail Report 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 lien request.
5	Click Download Crosstab to download the Detail Data in an Excel or CSV format.