# Valuation Equipment Report

Overview	This job aid discusses the functionality of the <b>Valuation Equipment Report</b> . This dashboard provides a summary and claim breakdown view that allows carriers to get a better understanding on what's driving post valuation configuration for each claim.
	<ul> <li>This dashboard allows users to perform the following actions:</li> <li>Identify behaviors of the <b>Appraisers</b> and <b>Reviewers</b> regarding the accuracy of performing valuations.</li> <li>Analyze trends over time by specific <b>Metrics</b> or <b>Breakout Attributes</b>.</li> <li>Identify claims requiring action.</li> <li>Identify how much equipment was Added/Remove on each valuation version.</li> <li>View how many valuations were completed broken out by vehicle model, age, year, etc.</li> </ul>
Access Valuatio Equipme Report	Follow the steps below to access the Claim Breakdown report via the CCC® Portal. nt
Step	Action
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 CCC Portal Welcome, Welcome, CCC Portal Welcome, CCCC Portal Welcome, CCC Portal Wel

2	Click the <b>Tableau Reporting &amp;</b> <b>Analytics</b> link in the Analytics section of the CCC <sup>®</sup> Portal home page. A new Analytics window opens.	Quick Search for Claim Folders     Analytics       Claim Reference ID:     • Tableau Reporting & Analytics
3	Click <b>Explore</b> on the left-side panel.	<
4	Select <b>All Workbooks</b> from the drop-down.	Explore All Workbooks -
5	Select the <b>Valuation Equipment Report</b> Dashboard.	<ul> <li>☆ Home</li> <li>☆ Favorites</li> <li>③ Recents</li> <li>﴿ Shared with Me</li> <li>۞ Recommendations</li> <li>ⓒ Collections</li> <li>④ Explore</li> </ul>



### Dashboard

#### Filters

Valuation Summary Claim Breakdown									
Valuation Equipment Report : Demo Company	Hierarchy 🔻	Date 🔻	Data 🔻   🖃 🥐						
Date Range : 2/1/2023 - 2/27/2024         Data Last Refreshed: 1/29/2024 9:36:40			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 <b>Appraiser Hierarchy</b>
	filter options.
2	Displays the <b>Adjuster Hierarchy</b>
	filter options.
3	Displays the Submitter Level
	Hierarchy filter options.
4	Displays the <b>Company Claim</b>
	Office Hierarchy filter options.

Hierarchy Filte	ers				
Appraiser Hierarch	ıy				
Appraiser Level 1	Appraiser Level 2		Appraiser Level 3		Appraiser Level 4
(All) •	(All)	٠	(All)	٠	UNK 🔻
Appraiser Level 5	Appraiser Level 6		Appraiser Level 7		
UNK •	UNK	٠	UNK	٠	
Adjuster Hierarchy	,				
Adjuster Level 1	Adjuster Level 2		Adjuster Level 3		Adjuster Level 4
(All) •	(All)	۳	(All)	٠	UNK •
Adjuster Level 5	Adjuster Level 6		Adjuster Level 7		
UNK 👻	UNK	٠	UNK	٠	
Submitter Hierarch	у				
Submitter Level 1	Submitter Level 2		Submitter Level 3		Submitter Level 4
(All) •	(All)	۳	(All)	٠	UNK •
Submitter Level 5	Submitter Level 6		Submitter Level 7		
UNK •	UNK	٠	UNK	٠	
Company Claim O	ffice Hierarchy				
Claim Office Level 1	Claim Office Level 2		Claim Office Level 3		Claim Office Level 4
(All) 🔻	(All)	٠	(All)	٠	UNK 🔻
Claim Office Level 5	Claim Office Level 6				
UNK •	UNK	٠			

#### Date Filters:

Stage	Description
1	Anchor Date: Select a claim lifecycle date when you want
	the dashboard graphs to begin displaying data.
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		
Valuation Date		•
Date Range Selection		
Custom Date Range		•
Custom Date Range		
Rolling 1 Year		•
Start Date 1/1/2023	End Date 1/17/2023	



#### Dashboard

#### Filters,

continued

#### Data Filters:

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

Data Filters			
Claim			
Claim Category	Claim Type	Claim Type	Detail
(All)	▼ (All)	<ul> <li>(All)</li> </ul>	<b>v</b>
Individual			
Appraiser Name	Adjuster Nan	ne Submitter N	ame Valuation Username
(All)	▼ (All)	▼ (All)	▼ (All) ▼
Valuation			
Submitter Type	Loss Catego	y Loss Type	Valuation State Code
(All)	▼ (All)	▼ (All)	• (All) •
Loss ZIP Code	Vehicle Age	Refurbished	Settlement Type
(All)	▼ (All)	▼ (All)	• No •
Valuation Version	Valuation So	urce Odometer R	Range Severity Group Range
(All)	<ul> <li>(All)</li> </ul>	▼ (All)	• (All) •
Vehicle			
Vehicle Make	Vehicle Mode	Vehicle Style	e Vehicle Type
(All)	<ul> <li>(All)</li> </ul>	<ul> <li>(All)</li> </ul>	▼ (All) ▼



Valuation The Valuation Summary tab displays a visual snapshot of the data that can be Summary filtered.

	Valuation Sun	Mary Claim Breakdown	ment Report: De	emo Company				Hie	rarchy 🔻 Date	▼ Data ▼	🗐 🕐	
	Date Range : 2	/1/2023 - 2/27/2024	Data Last Refreshed: 1/	29/2024 9:36:40							Hide Trends 🔵	
1	Trends: Months	Measures:     (Multiple values)	•	Breakout Attribute: Appraiser Name		Grand Total	Equipment Add Count 36,589	Equipment Remove Count 1,652	Equipment Remove and Ad E 38,241	Post Val quipment Perc E 95.7%	Post Val Equipment Perc 4.3%	
	Equipment Add Count	3,370		Attribute: Appraiser Name   Search:		Appraiser 0 Appraiser 1 Appraiser 2 Appraiser 3 Appraiser 4 Appraiser 5	171 158 187 167 176 175	5 12 14 7 6 7	176 170 201 174 182 182	97.2% 92.9% 93.0% 96.0% 96.7% 96.2%	2.8% 7.1% 7.0% 4.0% 3.3% 3.8%	
	Equipment Remove Count	177		Measures: (Multiple values)	م	Appraiser 6 Appraiser 7 Appraiser 8 Appraiser 9 Appraiser 10 Appraiser 11	156 164 168 167 192 173	12 6 7 6	168 170 175 173 198 175	92.9% 96.5% 96.0% 96.5% 97.0% 98.9%	7.1% 3.5% 4.0% 3.5% 3.0% 1.1%	
2	Equipment Remove and Add Count	3,547	$\sim$	Breakout Attribute(s):	Appraiser Name,	, All, All,	All	3				
	Post Val	95.0%	97.1	Attribute 1. Appraiser Name  Attribute 2:	Attribute 1 Appraiser 0	Equipment	Add Count Eq	uipment Remove Count 5	Equipment Remove and Add Coun	e Post Val Equ t Percentage	ipment Post \ Added Percent 97.2%	
	Equipment Percentage Added			Attribute 3:	Appraiser 1 Appraiser 2 Appraiser 3		158 187 167	12 14 7	17 20 17	D 1 4	92.9% 93.0% 96.0%	
	Post Val Equipment Percentage	5.0%	2.9	Attribute 4: All  Measures: %	Appraiser 4 Appraiser 5 Appraiser 6 Appraiser 7		176 175 156 164	6 7 12 6	18. 18: 16: 17:	2 2 8 0	96.7% 96.2% 92.9% 96.5%	
	Copyright © 2024 C	CC Intelligent Solutions. All Rights Re:	served, Confidential - use and de	stribution is subject to the restrictions of the app	licable CCC license agreement.							
					Deceminat							
31	tage				Descript	lion						
	I	<ul> <li>Trends</li> <li>Select In a select I results.</li> </ul>	can be filt Multiple va	ered by Totals lues under the	or in time • <b>Measure</b>	tne II e incr <b>s</b> dro	rement pp-dow	art: :s. vn and o	click <b>Ap</b> l	<b>ply</b> to v	view	
	2	Shows the Measures a	line charts and Trend s	s based on the selected.		Equ	uipment 3,370	Jhnj	$\sim$		Appretise New	
		<b>Hint:</b> Hover Measure co	r over the l ount at tha	ine chart to vie t time interval	e chart to view the ime interval			Add Count Valuation Months: Period Sta Equipment Add Count: 3,266				
		Note: Hide	Trends as	needed by sel	ecting the	e Tog	gle in 1	the upp	er-right	corne	r.	
	3	The Breako selected.	out Attribu	tes sections d	isplay the	seleo as Ad	cted <b>A</b>	Appra	e and <b>M</b> e	easure	S	
		<ul> <li>Dreakout Attributes include inters such as Adjuster, Appraiser, claim Types, Vehicle Information, and Time Frames.</li> <li>The options selected from the <b>Measures</b> drop-down are displayed in graph format.</li> </ul>										
		Note: The S	Search dro	p-down allow	s for inclu	ding	or exc	luding	Attribut	es.		



Valua conti	ation S nued	Summa	<b>ry</b> , Se	elect filte	ers and ti	me perio	ds in th	e Claim	Break	down d	dashboard
	Valuation Su	immary Claim B	reakdown	view per	Tormana						
	<b>#</b> 00	C Valuatio	on Detail Repo	ort : Demo Comp	any				Hierarchy	▼ Date ▼	Data 🔻   🗐 🥐
	Date Range :	2/1/2023 - 2/27/2024	l .	D	ata Last Refreshed: 2/19/	2024 4:51:19 PM					Show Trends
1	Breakout Appraise	t Attribute:			Avg Condition Rating	Avg Post \	aluation Amt	Avg Post Val	uation amt per Val	Va	luation Count
'				Grand Total Appraiser 2	1.1 1.0	-\$1	62 \$118		\$85 \$118	1	62,642
	Attribute:			Appraiser 6 Appraiser 13	1.0 1.0				\$0 \$0	1 2	
	Appraiser Search:	•		Appraiser 18 Appraiser 79	1.0 1.0	-\$8	\$106	-5	221 \$13	61 8	
				Appraiser 87 Appraiser 146	1.0	-\$2 -\$8	94	-5	\$56 272	58 12	
	Measures: (Multiple values	5) 🔻		Appraiser 158 Appraiser 184	1.0 1.0	-\$3	\$402 60	-5	\$139	26 48	
				Appraiser 232 Appraiser 262 Appraiser 310	1.1 1.1 1.0	-\$3 -\$3	42 79 \$463	-5	\$91 103 \$136	30 48 116	
	Breakout	Attribute(s):	Appraiser, Cl	aim Type, Loss C	ategory, Submit	ter					
2	Attribute 1:		Attribute 1	Attribute 2	Attribute 3	Attribute 4	Ava Conditi	on Rating Avg Po	st Valuation Avg	Post Valuation	Valuation Count
	Attribute 2:		Appraiser 2	Vehicle	Comprehensive	Submitter 189511		1.0	Amt \$118	amt per Val \$118	1
	Claim Type	•	Appraiser 6 Appraiser 13	Vehicle Vehicle	Liability Collision	Submitter 189511 Submitter 92906		1.0 1.0		\$0 \$0	1
	Attribute 3: Loss Category	•	Appraiser 18	Vehicle	Liability	Submitter 147616 Submitter 15		1.0	-\$2.133	\$0 -\$1.599	1
	Attribute 4:				Liability	Submitter 189511 Submitter 15		1.0	-\$346	\$0 -\$346	2 4
	Measures:				Other	Submitter 189511 Submitter 15		1.0	\$121	\$0 \$16	2 45
	(Multiple values	s) •	Appraiser 79	Vehicle	Collision	Submitter 72		1.0		\$0	4
	Copyright © 2024 Any attributes and	CCC Intelligent Solution Intelligent metrics based on the	ons. All Rights Reserved, way the carrier classified	Confidential - use and distribut them (e.g., "Last Post Val To S	ion is subject to the restriction ettlement Count") will only be	is of the applicable CCC license a as accurate as the underlying cla	greement. ssifications.				
Sta	ae					Descrip	tion				
1	<b>3</b> -	he top	Breako	ut Attribu	te sectio	n shows ar	analyz	es of a s	inale A	ttribute	e in a bar
	ç	graph by	y the Me	easure(s)s	elected.						
2	T	he bot	tom Bre	akout Att	ribute(s)	section sh	ows an	addreda	ate view	of up t	o four (4)
	C	of the s	elected	Attributes	s, based o	on the Mea	sure(s)	selecte	d.	I	
	ſ	lick the	e plus +	icon to ex	nand the	Attributes	scolum	ns show	n in the	dashb	oard. Press
	t	he min	us – icol	n to collar	se the At	tributes c	olumns.			duonio	
	ľ	Appraiser, v	ciaim Type,	Loss Category,	Submitter			Ave Post V	aluation Aug I	est Valuation	
		Attribute 1	ź+ <sup>™</sup> At	tribute 2 Attrib	oute 3 Att	ribute 4	Avg Condition Rat	ting Avg Post v	Amt	amt per Val	Valuation Count
		Appraiser 2 C	Ve Ve	hicle Comp hicle Liabil	orehensive Sul ity Sul	bmitter 189511 bmitter 189511		1.0	\$118	\$118 \$0	1
		Appraiser 13	Ve	hicle Collis	ion Sul	bmitter 92906		1.0		\$0 \$0	1
		Appraiser 18	Ve	hicle Collis	ion Su	bmitter 15		1.0	-\$2,133	-\$1,599	8
3	0	Click the	e Break	out Attrib	ute dashb	ooard item	s to filte	er the da	ashboar	d by yo	ur
	s	electio	n. Pres	s <b>Control</b> 1	to select	multiple it	ems.				
	Г					-					
		Breakout	Attribute(s	): Appraiser,	Claim Type	e, Loss Categ	ory, All				
		Attribute 1:	]	Astallasta		- 2	10.2	Attalhute	Ave Constitution	Detir.	
		Appraiser	•	Attribute 1	Attribut	e z Attribu	te 3	Attribute 4	Avg Conditio	on Ratin	
		Attribute 2:	•	Appraiser 2	Vehicle	Compre	ehensive	All		1.	
		Attribute 2:		Appraiser 0	Vehicle	Collisio	n /	All		1.	
		Autoute 3:				1.1.1.104					



Claim

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

Valuation	Equipment	Report : Demo C	Company			Hie	erarchy 🔻 Date 🔻	Data 🔻 📔 🖃	?
Date Range : 1/1/2024 - 2/27/2024							Data Las	t Refreshed: 1/29/2024 9:	:36:40 PI
Show Crosstab O Yes No 1	Total Rows 16,243	s Measures (Multiple values)	3				4	Download Cros	sstab
Claim Number	Valuation Version	Appraiser Name	Appraiser Hierarchy Level 1 Name	Appraiser Hierarchy Level 2 Name	Appraiser Hierarchy Level 3 Name	Appraiser Hierarchy Level 4 Name	Adjuster Hierarchy Level 1 Name	Adjuster Hierarchy Lev 2 Name	rel Ar Ni
1-0401411235ZCO	Original	Appraiser 2	Appraiser Level 1 #2	Appraiser Level 2 #7	Appraiser Level 3 #11	UNK	Adjuster Level 1 #2	Adjuster Level 2 #7	A
1-0401411235ZCO	Original	Appraiser 7	Appraiser Level 1 #2	Appraiser Level 2 #5	Appraiser Level 3 #23	UNK	Adjuster Level 1 #2	Adjuster Level 2 #5	A
1-0401411235ZCO	Original	Appraiser 9	Appraiser Level 1 #3	Appraiser Level 2 #6	Appraiser Level 3 #13	UNK	Adjuster Level 1 #3	Adjuster Level 2 #6	A
1-0401411235ZCO	Original	Appraiser 13	Appraiser Level 1 #2	Appraiser Level 2 #7	Appraiser Level 3 #15	UNK	Adjuster Level 1 #2	Adjuster Level 2 #7	A
1-0401411235ZCO	Original	Appraiser 14	Appraiser Level 1 #1	Appraiser Level 4	aiser Level 3 #21	UNK	Adjuster Level 1 #1	Adjuster Level 2 #6	A
1-0401411235ZCO	Original	Appraiser 17	Appraiser Level 1 #3	Appraiser Lev	aiser Level 3 #16	UNK	Adjuster Level 1 #3	Adjuster Level 2 #6	A
1-0401411235ZCO	Original	Appraiser 20	Appraiser Level 1 #2	Appraiser Lev	aiser Level 3 #14	UNK	Adjuster Level 1 #2	Adjuster Level 2 #8	A
1-0401411235ZCO	Original	Appraiser 23	Appraiser Level 1 #1	Appraiser Lev	aiser Level 3 #20	UNK	Adjuster Level 1 #1	Adjuster Level 2 #9	A
1-0401411235ZCO	Original	Appraiser 24	Appraiser Level 1 #1	Appraiser Lev	aiser Level 3 #16	UNK	Adjuster Level 1 #1	Adjuster Level 2 #6	A
1-0401411235ZCO	Original	Appraiser 28	Appraiser Level 1 #0	Appraiser Level 2 #8	Appraiser Level 3 #20	UNK	Adjuster Level 1 #0	Adjuster Level 2 #8	A
1-0401411235ZCO	Original	Appraiser 32	Appraiser Level 1 #3	Appraiser Level 2 #8	Appraiser Level 3 #18	UNK	Adjuster Level 1 #3	Adjuster Level 2 #8	A
1-0401411235ZCO	Original	Appraiser 38	Appraiser Level 1 #3	Appraiser Level 2 #7	Appraiser Level 3 #17	UNK	Adjuster Level 1 #3	Adjuster Level 2 #7	A
1-0401411235ZCO	Original	Appraiser 42	Appraiser Level 1 #3	Appraiser Level 2 #5	Appraiser Level 3 #20	UNK	Adjuster Level 1 #3	Adjuster Level 2 #5	A
1-0401411235ZCO	Original	Appraiser 51	Appraiser Level 1 #0	Appraiser Level 2 #6	Appraiser Level 3 #20	UNK	Adjuster Level 1 #0	Adjuster Level 2 #6	A
1-0401411235ZCO	Original	Appraiser 56	Appraiser Level 1 #3	Appraiser Level 2 #8	Appraiser Level 3 #14	UNK	Adjuster Level 1 #3	Adjuster Level 2 #8	A
1-0401411235ZCO	Original	Appraiser 58	Appraiser Level 1 #3	Appraiser Level 2 #8	Appraiser Level 3 #22	UNK	Adjuster Level 1 #3	Adjuster Level 2 #8	A
1-0401411235ZCO	Original	Appraiser 59	Appraiser Level 1 #1	Appraiser Level 2 #8	Appraiser Level 3 #11	UNK	Adjuster Level 1 #1	Adjuster Level 2 #8	A
1-0401411235ZCO	Original	Appraiser 65	Appraiser Level 1 #1	Appraiser Level 2 #5	Appraiser Level 3 #20	UNK	Adjuster Level 1 #1	Adjuster Level 2 #5	A
1-0401411235ZCO	Original	Appraiser 65	Appraiser Level 1 #2	Appraiser Level 2 #7	Appraiser Level 3 #11	UNK	Adjuster Level 1 #2	Adjuster Level 2 #7	A
1-0401411235ZCO	Original	Appraiser 68	Appraiser Level 1 #2	Appraiser Level 2 #5	Appraiser Level 3 #23	UNK	Adjuster Level 1 #2	Adjuster Level 2 #5	A
4.0401411095700	Original	Annealour 70	Approximate Local 4 40	Annenicae Louisl O #0	Anneninae Laural 2 #22	LINI#	Aduatar Laual 4 #0	Aduatar Laural 9 #0	۸.

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

