User’s Guide
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Chapter 1
Welcome to XactAnalysis

XactAnalysis is a powerful and secure extranet site that lets you send and track assignments electronically, view completed estimate information, create real-time management reports, and set up and manage administrative elements including price lists, contractors, and hierarchy. This user’s guide helps you understand these capabilities.

Note: XactAnalysis has been customized to suit the needs of your company. You might notice that your version of the modules may be slightly different from what is displayed in this user’s guide, but the basic instructions remain the same.

Here’s how the chapters break down:

▲ Chapter 1—“Welcome to XactAnalysis” introduces you to XactAnalysis and shows you how to log in to the modules.

▲ Chapter 2—“Administration” teaches you how to set up Administration: hierarchy, users, price lists, program rules, and contractors/adjusters/claim reps/franchisees.

▲ Chapter 3—“Assignments” teaches you about the tracking and analytical capabilities of XactAnalysis, as well as creating and sending new assignments, multiple assignments, and test assignments.

▲ Chapter 4—“Reports” instructs you on the viewing and usage of various reports XactAnalysis offers.

▲ Chapter 5—“The XactAnalysis Assignment Cycle” shows you the workflow that you would use in your every day running of XactAnalysis.

Note: Running XactAnalysis requires that you use Microsoft Internet Explorer version 6.0 (or higher) and that your browser have Active Scripting and Cookies enabled. Internet Explorer normally loads with these preferences already enabled, so this shouldn’t be a concern unless you’ve disabled them.
ACCESSING XACTANALYSIS

To access XactAnalysis,

1. Start Internet Explorer.

2. Type www.xactanalysis.com as the path in the Address field, then press Enter on your keyboard.

3. Enter your user name and password, then click OK.

   Note: You can get a user name and password from your Xactware contact.

The XactAnalysis Welcome page appears (or a different page if you have set up a different startup page as described in “Customizable Menu Options” on page 16).

The Welcome page is divided into four sections: menus, customizeable icons, quick search, and recently viewed assignments.
**Accessing XactAnalysis**

The XactAnalysis menus appear at the top of every page in XactAnalysis. You can access almost every portion of XactAnalysis from these menus. Your three main menus are Assignments (covered in Chapter 3), Reports (in Chapter 4), and Administration (covered in Chapter 2). You can also view the Help menu to get assistance in using XactAnalysis.

![XactAnalysis Menus](image)

**Customizeable Menu Options**

The XactAnalysis Welcome page displays a number of icons that allow you to quickly jump to your most frequently used XactAnalysis modules by clicking on them. By default, the modules that appear are Advanced Search (page 102), Send Work Assignment (page 131), Management/Activity Reports (page 202), and XactNet Address Book (page 36).

If there are other modules you’d like to see in this Welcome window, click the customize these options link. XactAnalysis brings you to the Customize Menu Options window. You can also click this link if you want to change your default startup page.

![Customize Menu Options](image)

Place a checkmark next to the modules you want to include on your Welcome page, and click to deselect any modules you no longer want. Click the Start Page drop-down button to select the module you’d like to start.
When finished, click **Save**. When you return to the *XactAnalysis Welcome* page, you’ll see the changes that have taken place. If you have chosen a new start page, that page will be the window that appears immediately after login.

### Quick Search

The *Quick Search* portion of the welcome page allows you to quickly find an assignment if you know its claim number or insured name. You can also find the assignments assigned to a specific adjuster/contractor.

To use Quick Search, simply type the claim number, insured name, or adjuster/contractor name into the *Quick Search* field, then select *Claim Number*, *Insured Name*, *Adjuster/Contractor*, or *ZIP/Postal Code* from the field below it.

When you click the **Search** button, XactAnalysis takes you to the *Search Results* window (if more than one name/number fits the search criteria) or the *Assignment Detail* window (if a single assignment fits the search criteria).

### Recently Viewed Assignments

The *Recently Viewed Assignments* section displays all the assignments you have viewed recently, and links you to the *Assignment Detail* of each.

Simply click on the **Claim #** link to see the *Assignment Detail* for this assignment.
The XactAnalysis Administration modules give you the option of setting up and maintaining:

- **User Information**
- **User Administration**
- **XactNet Address Book**
- **Personal Address Book**
- **Price Lists**
- **Geographic Hierarchy**
- **Organization Hierarchy**
- **Adjusters/Contractors**
- **Coverage Areas**
- **Program Rules**
- **Personal Rules**
- **User Roles**
- **XactAnalysis Preferences**
- **User Search Column Admin**
- **Custom Report Groups**
USER INFORMATION
To open the User Information page, click User Information from the Administration menu.

The User Information page displays the current user's name, user ID, email address, and password expiration date along with address info (in some cases), company rights, and language settings. You can edit your email address by clicking Edit, and change your password/PIN by clicking the Change Password or Change PIN links. You can choose to view the Assignment Details and Send Work Assignments windows in Canadian French (where applicable) by clicking the corresponding radio button.

CHANGING PASSWORDS
To change your XactAnalysis password,

1. Click Change Password from the User Information page.

   The Change User Password page appears with your login name already entered in the Login Name field.

   2. Enter the old password for this login name.
   3. Enter a new password.
   4. Confirm the new password by entering it a second time.
   5. Click Change Password to save the new password.
USER ADMINISTRATION
User Administration allows you to assign rights to your users and change settings for each user. You can also add and delete users from this window.

To view User Administration,

1. Click User Administration from the Administration menu.

The User Admin window appears, showing a list of all users for your company.

![User Admin Window](image)

Note: If you have more than 50 users, then only the first 50 users appear at first. You can select to show all users by clicking the command at the bottom of the list.

From this window, you can filter the list to view only users you want to see, as well as add, edit, and delete users.
Adding a User

To add a new user to this list,

1. Click **Add a New User**.

   The Add a New User window appears.

   ![Add a New User Window](image)

   Enter the following information in the appropriate fields.

2. Enter a user ID for this new user.

3. Enter the user's first name, press **Tab**, then enter the user's last name.

4. Enter a PIN (personal identification number) for this user if your company uses PINs.
   
   Some companies use PINs to receive voice notifications ([see “Notification setup” on page 79](#)). You can use up to eight digits for this PIN.

5. Enter a password for the user, press **Tab**, then enter the same password again.

6. Select a date for the user's password to expire.
   
   XactAnalysis defaults this field to the current date, which makes the password expire immediately and forces the user to choose a new password at the first login.

7. Enter the user's email address.
8. Click **Save**.

The *Edit User* window appears.

The *Edit User* window displays the information you just entered in the *Add User* window, along with space for company, organization, and application rights. See “Editing a user” starting with step 8, next, to continue adding this user.
**EDITING A USER**

To edit a user,

1. From the *User Admin* window, place a checkmark in the checkbox next to the user you want to edit, then click **Edit Selected User(s)**.

The *Edit User* window appears.

*Note: You can also see the *Edit User* window by clicking on the user’s hypertext link.*

### XactAnalysis Administration - User Admin

<table>
<thead>
<tr>
<th>User ID</th>
<th>User Name</th>
<th>Email Address</th>
<th>Password Exp</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ddb</td>
<td><a href="mailto:ddb@sh.com">ddb@sh.com</a></td>
<td>31-Jul-2010</td>
</tr>
<tr>
<td>2</td>
<td>ddu</td>
<td><a href="mailto:ddu@sh.com">ddu@sh.com</a></td>
<td>06-Jul-2010</td>
</tr>
<tr>
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<td>edo</td>
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</tr>
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</tr>
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<td><a href="mailto:jen@sh.com">jen@sh.com</a></td>
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</tr>
<tr>
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<tr>
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<td><a href="mailto:sbr@sh.com">sbr@sh.com</a></td>
<td>26-Jul-2010</td>
</tr>
</tbody>
</table>
2. Modify any data in **User Properties** that you need to edit.

   This information includes user ID, first and last name, PIN, password and password expiration date, and email address.

   **Note:** Steps 3–7 may not apply to your specific user, especially if you are still adding the user.

3. Fill in the user’s address, city, state, and ZIP code in the fields of **Contact Info**.

4. Click **Add** to indicate how the user prefers to be contacted.

   Some contact method fields appear, which allow you to enter the preferred method of contact.

5. Enter the number or address to use to contact the user in the **Number/Address** field.

6. Click the **Type drop-down button** to describe the information entered in step 5 (e.g., mobile phone, email, fax, office phone).
7. Repeat steps 4–6 for each contact method you want to add for this user.

8. Click **Add New Right**, located to the right of **Data Set/Hierarchy Rights**.

The **Add Data Set/Hierarchy Rights** window appears.

Data set/Hierarchy rights give users access to various data sets that your company has set up.

These rights reflect the geographic hierarchy of your company that was set up previously. From here, you can assign the geographical areas of the company that this employee has rights to. (If the geographic hierarchy of your company has not been set up yet, see “Geographic Hierarchy” on page 50.)

**Note:** In the Safe Haven example following, Safe Haven uses a hierarchy of “Region” and “Program Location.” Your company’s hierarchy may differ slightly in the names it uses for its levels, but the basic instructions are the same.
9. Click the name of the data set.
   The hierarchical regions for this data set appear, along with an Add Right button.

   ![Image]
   If you click Add Right now, XactAnalysis gives the user rights to this level of the data set and all levels below it.

10. If this user has rights to all regions of this data set, click Add Right. If not, click a region the user has rights to.
    If you clicked Add Right, skip ahead to step 14.
    If you clicked a region, the program locations for this region appear.

   ![Image]
   This window displays the areas you are assigning rights to for this employee.
   If you click Add Right now, XactAnalysis gives the user rights to this region of the company and all program locations below it.
   This level shows you the areas the employee would have rights to if you click Add Right now. If this area of rights is too broad, you can narrow it by clicking an individual area and clicking Add Right from there.

11. Use this drill-down method to find the area you are assigning rights to for this user.
12. When you get to the level in the company you are assigning to this user (the level appears in the box at the top of the field), click **Add Right**.

The rights appear in the **Data Set/Hierarchy Rights** area of the **Edit User** window.

13. Repeat **steps 8–12** to add additional rights to this user.

You can add several different data sets of geographical rights to the user.

![Data Set/Hierarchy Rights](image)

**Note:** Do not assign a level of the company to the user unless you want that user to have rights to all levels underneath it.

14. Click **Add New Right**, located to the right of **Organization Rights**.

**Note:** Adding organizational rights is optional. If your company does not use these rights, skip ahead to **step 20**.

![Organization Rights](image)

The Add Organization Rights window appears.

![Add Organization Rights](image)

The organization rights reflect the organizational hierarchy of your company that was set up previously. From here, you can assign the user rights to view data from assorted individuals within the company. For example, if you set up this user to see the team of office manager Bret Hall, then the user can view management reports on Bret Hall and all claim reps assigned to him.

If the organization hierarchy of your company has not been set up yet, see “Organization Hierarchy” on page 59.

**Note:** In the Safe Haven example following, Safe Haven uses a hierarchy of “regional office,” “office manager,” and “claim rep.” Your company’s organization hierarchy may differ slightly in the names it uses for its levels, but the basic instructions are the same.
15. Click the company name.
The regional offices for this company appear.

![Image of XactAnalysis interface showing company and regional office selection]

16. If this employee has rights to all regional offices of this company, click **Add Right**. If not, click a regional office the user has data rights to.

If you clicked Add Right, skip ahead to **step 20**.

If you clicked a regional office, the office managers for this region appear.

![Image of XactAnalysis interface showing office managers]

17. Use this drill-down method to select individual claim reps you are assigning rights to for this user.

18. When you get to the level in the company you are assigning to this user (the level appears in the box at the top of the field), click **Add Right**.

The rights appear in the **Organization Rights** area of the **Edit User** window.
19. Repeat steps 14–18 to add additional organization rights to this user.
You can add several different sets of organization rights to the user.

Note: Do not assign a level of the company to the user unless you want the user to have access to data for all levels underneath it.

20. Under the Application Rights header, place a checkmark next to each application the user needs access to.
You can click Select all if the user should have rights to all applications.

The applications that you have available in this section were determined when your company first signed up with XactAnalysis. If you have any questions regarding any applications not seen in the Safe Haven example, see your XactAnalysis administrator.

21. Click Save from the Edit User window.

22. If there are any company-specific rights you’d like to assign to this user, click Add New Right to the right of the Company-Specific Application Rights header.
The Add Company-Specific Application Rights window appears.
23. Click the **Location SmartList button** to select the location you want this user to have this right for.

24. Click the **Application drop-down button** to select the application you want to assign to this user.

25. Click **Add Right**.

26. Click **Save** from the *Edit User* window.

   XactAnalysis saves the user and all modifications associated with that user.

   If you did not assign the user Collaborator rights in step 20, you are finished. Click the **User Admin** link to return to the *User Admin* window.

   If you did assign the user Collaborator rights in step 20, a Collaborator XactNet Address section appears.

   27. Click the **Add XactNet Address** link.

   The XactNet Address Search window appears.

   28. Type all or part of a claim rep (to search for that claim rep's XactNet address), an actual XactNet address, or an email address (to search for the XactNet address linked to this e-mail address, then click **Submit**.

   One or more XactNet addresses appear for you to choose.

   29. Click the XactNet address that the user will receive messages at when used as a collaborator.

   XactAnalysis returns to the *Edit User* window.

   30. Click **Save**.

   XactAnalysis saves the user and all modifications associated with that user. If you have no further changes, click the **User Admin** link to return to the *User Admin* window.
CHANGING A USER’S PASSWORD

To change a user’s password,

1. From the User Admin window, place a checkmark in the checkbox next to the user you want to change password for, then click Edit Selected User(s).

   The Edit User window appears.

2. Click Change Password.

   Click here to change the user’s password.

   The Change Password window appears.

3. Type the new password, press Tab, then type the new password again.

4. Click Save.

   XactAnalysis saves the new password for this employee.
**EDITING A GROUP**

You can edit multiple users to apply the same information (such as password expiration date and rights) to them all. This makes it easier to apply uniform choices to more than one user at a time.

To edit a group of users, place a checkmark in the checkbox next to the users you want to edit in the User Admin window, then click **Edit Selected User(s)**. The *Edit Group* window appears.

This window shows the users in this group, along with their password expiration dates, and the company and application rights are associated with the group. You can universally change any of these factors.

**CHANGING A GROUP PASSWORD EXPIRATION DATE**

To align the password expiration date of a group,

1. Click the **Password Expiration Date Calendar button**.
   A SmartCalendar appears.

2. Click the date you want to use as an expiration date for the passwords belonging to this group.
   The selected date appears in the field.

3. Click **Save Date**.
   A window asks you to confirm the change.

4. Click **OK**.
   The new password expiration date appears next to each user in the group.
ADDITION RIGHTS
The Company Rights list displays any geographic hierarchy level that any user of the group has access to. A bar appears to the right of the hierarchy level, and to the right of that is a number, indicating the number of people in the group who have rights to this hierarchy level. You can add rights for a hierarchy level to the entire group, or remove rights for the entire group.

To add company rights to the entire group,

1. Click Add new right.
   A window asks you to confirm your decision to add new rights.
2. Click OK.
   The Add Program Rights window appears.
3. Use the Add Program Rights window (as described in the steps beginning on page 25) to drill-down to the level of hierarchy you want to add to the group, then click Add Right.

   ![Company Rights List]

   This region has just been added to all members in the group.

   Three members of this group have rights to this region.

   The new hierarchy level appears in the Company Rights list, and shows (by the number to the right) that all members of this group now have rights to this hierarchy level.

   You can remove rights from all members of a group by clicking Delete for selected. XactAnalysis will confirm you want to delete all rights from this group, then remove the region from the Company Rights list.

   You can add and remove organization rights, application rights, and company-specific application rights the same way you add and remove company rights; simply click below to the proper header instead of the Company Rights header.
DELETING A USER

To delete a user,

1. From the User Admin window, place a checkmark in the checkbox next to the user(s) you want to delete, then click Delete Selected User(s).

   ![User Admin Window](image)

   XactAnalysis asks if you’re sure you want to delete the user(s).

2. Click OK.

   XactAnalysis deletes the selected users.

FILTERING THE USERS LIST

If you have a long users list and want to view a smaller portion of the list, you can do so by using the User Admin filter. This filter allows you to filter out the names that don’t match the criteria you enter, thus shortening the list to a more manageable length.

To use the filter, enter some text for the person you choose to view: a first or last name, for example. Click Filter, and XactAnalysis removes the names that don’t have this text in them from the list.

![User Admin Filter](image)

Note: XactAnalysis doesn’t permanently delete these names, it just removes them from the visible list.

While this filter will take care of most of your filtering needs, a larger company might have need for a more advanced filter. For example, you’re in a company of 900 employees and need to find an employee named Smith who has the rights to change the company hierarchy. There can be a lot of Smiths in a 900-employee
company, and you probably don’t want to inspect every one of them to determine who has the rights you need. If you have a situation like this, click Advanced. The window expands to look like this:

From this window, you can now enter a more detailed criteria. You can search by the user name, user ID, location (Location is a Smartfield: click the button to see a list to choose from), and applications. In this example, you could simply select XactAnalysis Administration > Hierarchy, then click Filter again. XactAnalysis runs the names through this filter and gives you a much more reasonable list to choose from.
**XactNet Address Book**

You can view the list of assignees available to your company by viewing the address book. To open the address book, click **XactNet Address Book** from the Administration menu. XactAnalysis displays a list of assignees available to this company.

You can sort this list by any of the headers displayed at the top by simply clicking on the header.

You can filter any of the XactNet addresses by carrier, qualification, or profile by simply clicking the drop-down button for the filter you want to use, then clicking the **Filter** button near the top of the page; only those assignees who fit the specifications will appear in the XactNet address book.

You can also look up a specific assignee if you have all or a portion of the adjuster name or XactNet address, which you can enter into the appropriate field, then click **Filter**; only those assignees who have all or part of the entered name or address will appear in the XactNet address book.

*Note:* You can click on an assignee’s XactNet address link to view the assignee’s information. (See “Adjusters/Contractors” on page 66.)

**Adding a Contractor to Your Personal Address Book**

While you are viewing this XactNet address book, you have the option of adding a contact to your personal address book (see “Personal Address Book” on page 37). To do this, place a checkmark next to the contractor(s) you want to add, then click the **Add to Personal Address Book** button. XactAnalysis asks if you’re sure you want to add the contractor(s); click **OK**. While you won’t see any immediate difference, you will see this contact added to your personal address book.
PERSONAL ADDRESS BOOK
You can keep a list of contacts (personal or business) in XactAnalysis by clicking Personal Address Book from the XactAnalysis main menu. Your list of contacts will appear.

To add a contact to your address book,

1. Click the Create New button.
   The Add New Contact window appears.

2. Enter the contact’s first and last name.

3. If the contact is a business associate, enter the contact’s company.

4. Enter the street address associated with this contact or company.

5. Enter the contact’s city, state, and ZIP Code in the correct fields.
6. Click **Save & Continue**.

The Add a New Contact window becomes the Edit Contact [name] window and you can now add contact methods to the new contact.

![Edit Contact Window](image)

Click here to add new contact methods to this contact.

7. Click **Create New**.

The *Contact Method for [name]* window appears.

8. Select a contact type by clicking the drop-down button and choosing a contact type.

   You can choose e-mail, fax, home (phone), mobile (phone), office (phone), pager, and XactCentral (XactNet address).

9. Type the characters that make up the number/address, then type a description if you choose.

10. Click **Save**.

    The new contact method now appears in the *Edit Contact* window.
11. Repeat steps 7–10 until all contact methods have been added.

12. Click **Save**.

The new contact now appears in your personal address book.
**Price Lists**

The Price Lists section of XactAnalysis allows you to define your price list areas. A price list area consists of a checkpoint price list (to compare a contractor’s price list against) and one or more ZIP or postal codes (to define which areas to use the checkpoint price list in).

To set up or make changes to price list areas or to assign checkpoint price lists,

1. Click **Price Lists** from the Administration menu.

The Price List Administration page appears with a map showing each of the states and Canada.
2. Click Canada or the state you want to adjust price list areas for.

The Create Price List Area page appears for Canada or that state.

Note: If you selected Canada, you must also click the province you want.

The Create Price List Area page displays the current price list areas, along with the checkpoint price lists that have been assigned to each price list area. You can add, edit, and delete price list areas, as well as associate specific checkpoint price lists to the price list areas. You can also define the ZIP/postal codes that use each price list area by clicking the Define Service Area for Price List Areas link (see “Defining the price list service area” on page 44).
CREATING A PRICE LIST AREA
A price list area consists of a checkpoint price list and one or more ZIP or postal codes. The Create Price List Area allows you to create the price list and add and delete price lists, and link checkpoint price lists to the price list areas.

ADDING A NEW PRICE LIST AREA
To add a new price list area to a state,

1. Click **Add New Price List Area**.

An Add New Price List Area window appears, displaying all the checkpoint price lists available to you for this state.

2. Enter the name you’d like to use for this new price list area in the Area Description field.

3. Click to highlight the checkpoint price list you want associated with the price list area.

4. Click **Continue**.

   A window confirms the price list area decisions you have made.

5. Click **Add Price List**.

   A new window confirms that the price list area has been added successfully.
6. Click Close Window.

The new price list area appears on your Create Price List Area window.

**EDITING A PRICE LIST AREA**

Once you’ve applied a checkpoint price list to a price list area, you can change this information easily.

To edit a price list area,

1. Click **Edit** from the price list area you want to edit.
   
   The Edit Price List Area window appears.

2. Click the new price list you want to associate with the price list area, then click **Continue**.
   
   A window confirms the price list decision you have made.

3. Click **Assign**.
   
   A new window confirms that the new price list has been added to the price list area successfully.

4. Click **Close Window**.
   
   The new price list appears as the Checkpoint Price list for the selected price list area.
DELETING A PRICE LIST AREA
You can delete price list areas that you no longer need or were entered by mistake.

To delete a price list area,

1. Click **Delete** from the price list area you want to delete.
   
   The *Delete Price List Area* window appears.

2. Click **Delete Area**.
   
   A window confirms that you have deleted the price list area successfully.

3. Click **Close Window**.
   
   The price list area has now been removed from the Create Price List Area page.

DEFINING THE PRICE LIST SERVICE AREA
A price list area consists of a checkpoint price list and one or more ZIP or postal codes. After you've created a price list area in the Create Price List Area page (see "Creating a price list area" on page 42), you can link ZIP or postal codes to the price list area by clicking the Define Service Area for Price List Areas link.
Assigning ZIP or postal codes allows you to assign a specific checkpoint price list to your contractors who work in a designated ZIP code. This also tells XactAnalysis which data to compare against when you run such reports as Estimate/Price List Differences.

Whether you want to assign ZIP or postal codes to a price list area, or remove them from the price list area, or simply view the ZIP/postal codes assigned to a price list area, you must select the price list area. To do this, select the price list area you are modifying from the drop-down list at the top right of the page. XactAnalysis displays a list of all ZIP or postal codes currently assigned to this price list area.

ZIP/postal codes can only be assigned to a single price list area at a time. If you add a pre-assigned ZIP/postal code to a new price list area, a warning note asks you to confirm that you want to move the ZIP/postal code to the new price list area.

ASSIGNING ZIP/POSTAL CODES TO A PRICE LIST AREA
There are several methods you can use to add a ZIP/postal code to a price list area. The easiest is to simply enter the new ZIP/postal code by typing it on your keyboard.

1. Select the price list area you are modifying from the drop-down list at the top right of the page.
   XactAnalysis displays a list of all ZIP or postal codes currently assigned to this price list area.

2. Type the first ZIP/postal code you want to add in the field provided.

3. If you have additional ZIP/postal codes you want to add, type a comma, a space, then type the next ZIP/postal code. Repeat this step until you have all codes typed in.

4. Click the Add button.
   A window requests confirmation for the ZIP/postal codes you want to add to this price list area.

5. Click Add Zip/Postal Codes.
   A window confirms that you have added the codes successfully.

6. Click Close Window.
   The new ZIP/postal code(s) appear(s) in the Zip/Postal Codes Serviced field.

Adding ZIP/postal codes from other price list areas
If there are ZIP/postal codes that have already been assigned to a price list area, you can follow these instructions to move them to a different price list area.

1. Select the price list area you are moving the ZIP/postal codes to from the drop-down list at the top right of the page.
   XactAnalysis displays a list of all ZIP or postal codes currently assigned to this price list area.
2. Under Add ZIP/Postal codes..., click **By Price List Area**.
   The Add ZIP/Postal Codes by Price List Area window appears.

   ![Image of Add ZIP/Postal Codes by Price List Area window]

   **ADD ZIP/POSTAL CODES FROM PRICE LIST AREA**
   Please choose a price list area and select the zip/postal codes you wish to move to the **UT From** price list area.

   **Price List Areas:**
   - Salt Lake City

   Hold down the "Ctrl" key to select multiple zip/postal codes.
   To select multiple zip/postal codes in a row, click on the first zip code then the last zip while holding down the "Shift" key.

3. Select the price list area you want to move ZIP/postal codes **from** in the Price List Areas field.

4. Highlight the code(s) you want to move to the first price list area, then click **Continue**.
   A window requests confirmation for the ZIP/postal codes you want to move from one price list area to another.

5. Click **Move Zip/Postal Codes**.
   XactAnalysis confirms that you have added the codes successfully.

6. Click **Close Window**.
   The new ZIP/postal code(s) appear(s) in the Zip/Postal Codes Serviced field the next time you refresh your browser.
Adding ZIP/postal codes by program location

If there are ZIP/postal codes that are located in a specific program location (a program location is a level in the Hierarchy; see “Geographic Hierarchy” on page 50 for more information on program locations), follow these instructions to associate them to a specific price list area.

**Note:** Your company may call this level of your Hierarchy something other than “program location.” In the sample company shown here, “program location” is the second option in the “Add ZIP/Postal codes” list. Use the equivalent option available to you.

1. Select the price list area you are modifying from the drop-down list at the top right of the page.

   XactAnalysis displays a list of all ZIP or postal codes currently assigned to this price list area.

2. Under Add ZIP/Postal codes..., click **By Program Location**.

   The Add ZIP/Postal Codes by Program Location window appears.

3. Select the program location you want to select ZIP/postal codes from in the Program Locations field.

4. Highlight the code(s) you want to associate to the price list area, then click **Continue**.

   A window requests confirmation for the ZIP/postal codes you want to add to this price list area.

   **Note:** If the selected ZIP/postal code is already linked to another price list area, you will receive a notice telling you that this will disconnect the old link when it re-links the ZIP/postal code to this new price list area.

5. Click **Add Zip/Postal Codes**.

   XactAnalysis confirms that you have added the codes successfully.

6. Click **Close Window**.

   The new ZIP/postal code(s) appear(s) in the Zip/Postal Codes Serviced field the next time you refresh your browser.
Adding ZIP/postal codes by county

If there are ZIP/postal codes that are located in a certain county in this state, follow these instructions to associate them to a specific price list area.

1. Select the price list area you are modifying from the drop-down list at the top right of the page. XactAnalysis displays a list of all ZIP or postal codes currently assigned to this price list area.

2. Under Add ZIP/Postal codes..., click By County. The Add ZIP/Postal Codes by County appears.

3. Select the county you want to select ZIP/postal codes from in the Counties field.

4. Highlight the code(s) you want to associate to the price list area, then click Continue. A window requests confirmation for the ZIP/postal codes you want to add to this price list area.

   *Note: If the selected ZIP/postal code is already linked to another price list area, XactAnalysis notifies you that this will disconnect the old link when it re-links the ZIP/postal code to this new price list area.*

5. Click Add Zip/Postal Codes. XactAnalysis confirms that you have added the codes successfully.

6. Click Close Window.

   The new ZIP/postal code(s) appear(s) in the Zip/Postal Codes Serviced field the next time you refresh your browser.
**Removing ZIP/postal codes from a price list area**

To remove a ZIP/postal code from a price list area,

1. Select the price list area you are modifying from the drop-down list at the top right of the page.
   XactAnalysis displays a list of all ZIP or postal codes currently assigned to this price list area.

2. Highlight the ZIP/postal codes you want to remove from the price list area.
   You can select multiple codes by pressing the Ctrl key on your keyboard as you click the codes.

3. Click **Remove ZIP/Postal Codes**.
   The Remove ZIP/Postal Codes window asks for confirmation that you want to remove these ZIP/postal codes.

   *Note:* Doing this only removes the ZIP/Postal codes from the price list area, not any of the program locations or other areas in the hierarchy.
**Geographic Hierarchy**

The Geographic Hierarchy module allows you to set up the geographical structure of your company—along with your ZIP Code areas—and helps determine where each type of geographical level belongs in relation to the others. You must set up your geographic hierarchy before you can set up any other administrative module.

*Note: Depending on your company, the names of the hierarchy levels may differ from what is listed in this user’s guide. The basic function of each level is still the same, however.*

Different companies have different levels of hierarchy, possibly as many as seven. Regardless of the exact number of levels, you will have a top level equivalent to “Regions” and a bottom level equivalent to “Program Locations.” Any additional levels will be added between these two geographical levels.

To set up and make changes to your hierarchy,

1. Click **Hierarchy** from the **Administration** menu.

   The Geographic Hierarchy Regions page appears.

This page lists the regions in your hierarchy. You can rename or delete a region by clicking on the corresponding labels to the right of each region name.
2. Click the region you want to view program locations for.

The Program Locations page appears.

Click this button to return to the Regions page.

Note that the region you selected is displayed here.

3. Click the program locations you want to view ZIP/postal codes for.

The ZIP Code page appears.

All of the ZIP/postal codes for the selected program locations are available in this list.

The ZIP/postal codes for the selected program location are shown on the right side of the page. You can add ZIP/postal codes to the current program location from a price list area, state and county, or from a different program location within the hierarchy. You can also delete ZIP/postal codes from this program location.
ADDITIONS AND PROGRAM LOCATIONS
Regions are made up of program locations, and program locations are made up of ZIP codes. Creating a region is simple: all you do is name a region to set it up, then create program locations to fill it. Additional levels unique to your company are the same: name the region, then create program locations to fill it. The real work is done at the program locations level (see “Creating a program location” on page 54).

To add a region,

1. From the Regions page, click **Add New Region**.

A window asks for the name of the new region.
2. Type the name of the new region and click **Continue**. A window asks if you want to add the new region.

![XactAnalysis User Interface](image)

3. Click **Add**.
   
   XactAnalysis confirms the region has been added.

4. Click **Close**.
   
   The new region appears in the Regions page.

   **Note:** *You may need to refresh your Regions page to see the new region.*

5. Click the new region to see the Program Location page.
   
   XactAnalysis informs you there are no program locations assigned to this region.

![XactAnalysis Program Location](image)

**Note:** *If you have any geographic hierarchy levels between regions and program locations, you can add them to the new region in the same way you added regions to the company.*
CREATING A PROGRAM LOCATION
Creating program location requires a little more work than other geographic levels, but is not a difficult procedure. When you first create a program location, you’ll need to link it with a single state or province. After you’ve created it, you’ll link it with a number of ZIP or postal codes to indicate the areas where those that belong to this program location do work from.

To create a new program location,

1. Click **Add New Program Location** from the Program Locations page.

   The *Add New* Program Locations window appears.

2. Type the name of the new program location.

3. Click the drop-down button ☰ to select the state/province you want to link to this program location.

   *Note: Each program location must be linked to only one state/province, but a state/province can be linked to more than one program location.*

4. Click **Continue**.

   A window asks you to confirm you want to link this program location with the selected state/province.

5. Click **Add**.

   A new window confirms the addition of your new program location.

6. Click **Close**.

   The new program location appears in the Program Location page.
ASSIGNING ZIP/POSTAL CODES TO A PROGRAM LOCATION

There are several methods you can use to add a ZIP/postal code to a program location. The easiest is to enter the new ZIP/postal code by typing it on your keyboard.

1. Make sure you’re in the correct program location page.
   You can determine this by viewing the hierarchy on the left side of the page.

2. Type the first ZIP/postal code you want to add in the field provided.

3. If you have additional ZIP/postal codes you want to add, type a comma, a space, then type the next ZIP/postal code. Repeat this step until you have all codes typed in.

4. Click the Add button.
   A window requests confirmation for the ZIP/postal codes you want to add to this program location.

   Note: If any of the ZIP/postal codes are currently assigned to another program location, you will receive a notice informing you of this. Continuing with this process removes the ZIP/postal codes from the original program location.

5. Click Add.
   A window confirms that you have added the codes successfully.

6. Click Close.
   The new ZIP/postal code(s) appears in the program location’s window after you’ve refreshed your browser.
Adding ZIP/postal codes from price list areas
If there are ZIP/postal codes that have already been assigned to a price list area (see “Creating a price list area” on page 42), you can follow these instructions to add them to a program location.

1. Make sure you’re in the correct program location page.
   You can determine this by viewing the hierarchy on the left side of the page.

   ![Image of program location hierarchy]

   If you have the wrong program location, click Regions and follow the steps beginning on page 51.

2. Under Add ZIP/Postal codes..., click By Price List Area.
   The Add ZIP/Postal Codes by Price List Area window appears.

   ![Image of Add ZIP/Postal Codes by Price List Area window]

3. Select the price list area you want to select ZIP/postal codes from in the Price List Areas field.

4. Highlight the code(s) you want to add to the program location, then click Continue.
   A window requests confirmation for the ZIP/postal codes you want to add to the program location.
   
   **Note:** If any of the ZIP/postal codes are currently assigned to another program location, you will receive a notice informing you of this. Continuing with this process removes the ZIP/postal codes from the original program location.

5. Click Add.
   A window confirms that you have added the codes successfully.

6. Click Close.
   The new ZIP/postal code(s) appear(s) in the program location’s window after you refresh your browser.
Adding ZIP/postal codes by state and county
If you know of a specific state and that has ZIP/postal codes you would like to add to a program location, you can follow these instructions to add them to that program location.

1. Make sure you’re in the correct program location page.
   You can determine this by viewing the hierarchy on the left side of the page.

   ![Hierarchy Diagram]

   This is the program location you’re adding ZIP/postal codes to.

   If you have the wrong program location, click Region and follow the steps beginning on page 51.

2. Under Add ZIP/Postal codes..., click By State and County.
   The Add ZIP/Postal Codes from County window appears.

3. In the States field, select the state where the county you want to select ZIP/postal codes from is located.

4. Select the county you want to select ZIP/postal codes from.
   The ZIP/postal codes assigned to that county appear in the list below.

5. Highlight the code(s) you want to move to the program location, then click Continue.
   A window requests confirmation for the ZIP/postal codes to be added to this program location.
   
   **Note:** If any of the ZIP/postal codes are currently assigned to another program location, XactAnalysis notifies you of this. Continuing removes the ZIP/postal codes from the original program location.

6. Click Add.
   A window confirms that you have added the codes successfully.

7. Click Close.
   The new ZIP/postal codes appear in the program location’s window after you refresh your browser.
Adding ZIP/postal codes by hierarchy

If you know of a specific program location that has ZIP/postal codes you would like to move to another program location, you can follow these instructions to add them to the new program location.

1. Make sure you're in the correct program location page.
   You can determine this by viewing the hierarchy on the left side of the page.

   ![Hierarchy Diagram]
   This is the program location you're adding ZIP/postal codes to.

   If you have the wrong program location, click Regions and follow the steps beginning on page 51.

2. Under Add ZIP/postal codes..., click By Hierarchy.
   The Add ZIP/postal codes from Hierarchy window appears.

   ![Add ZIP/postal codes from Hierarchy]
   This window displays the hierarchy similar to the rest of the Hierarchy windows. If you need to select the ZIP/postal codes from a different program location, click the Program Location drop-down button. If you need to see the program locations from a different program area, click Region. You can then drill-down to find the ZIP/postal codes you want to move.

3. Find the program location you want to select ZIP/postal codes from.
   The ZIP/postal codes assigned to that program location appear in the list below.

4. Highlight the code(s) you want to move to the new program location, then click Continue.
   A window requests confirmation for the ZIP/postal codes you want to move.

5. Click Add.
   A window confirms that you have added the codes successfully.

6. Click Close.
   The new ZIP/postal code(s) appears the next time you refresh your browser.
**Organization Hierarchy**

The Organization Hierarchy module allows you to set up a structure of “teams” within your company; these teams can be made up of claim reps, adjusters, and individual contractors: anybody who has an XactNet address.

**Note:** Depending on your company, the names of the organization levels may differ from what is listed in this user’s guide. The basic function of each level is still the same, however.

Different companies have different levels of hierarchy, possibly as many as seven. Regardless of the exact number of levels, you will have a top level equivalent to “regional office” and a bottom level equivalent to “office manager.” Any additional levels will be added between these two organization levels.

To set up and make changes to your hierarchy,

1. Click **Organization Hierarchy** from the **Administration** menu.

The Organization Hierarchy page appears.

This page lists the organization hierarchy in your company, including the levels of organization and the actual offices in the highest level of organization (in this case, regional offices). In the example of Safe Haven, each regional office is made up of a team of office managers, and each office manager is made up of a team of claim reps.
2. Click the regional office you want to view office managers for.

The *Office Manager* page appears.

The list of office manager teams, along with these claim reps, make up the Rocky Mountain regional office team.

The office managers for the selected regional office are listed on this page, along with the claim reps assigned to the regional office selected.
3. Click the office manager you want to view claim reps for.

The *Claim Reps* page appears.

The claim reps for the selected office manager are shown on the right side of the page. You can add unassigned claim reps to the current office manager, rename the office manager, or remove claim reps from the list of claim reps assigned to this office manager.
ADDING REGIONAL OFFICES AND OFFICE MANAGERS
Regional offices are made up of office managers, and office managers are made up of claim reps. Creating a regional office is simple: all you do is name it to set it up, then add office managers to fill it. Additional levels unique to your company are the same: name it, then add managers and claim reps to fill it.

To add a regional office,

1. From the Organization Hierarchy main page, click Add New Regional Office.

![Organization Hierarchy screenshot]

A window asks for the name of the new regional office.

![Add a Regional Office window]

2. Type the name of the new regional office and click Add Level.

The new regional office appears in the main Organization Hierarchy page.

*Note:* You may need to refresh your page to see the new regional office.
3. Click the new region to see the Office Manager page.
XactAnalysis informs you there are no office managers or claim reps assigned to this regional office.

```
Click here to add office managers.
```

**Note:** If you have any organization hierarchy levels between regional offices and office managers, you can add them to the new regional office in the same way you added regional offices to the company.

**ADDING OFFICE MANAGERS**
To add a new office manager,

1. Click **Add New Office Manager** from the Regional Office page.

```
The Add Office Manager window appears.
```

2. Type the name of the office manager you’re adding, then click **Add Level**.

3. Repeat **steps 1–2** to add as many office managers as necessary.

```
Since an office manager can also be a claim rep, you can add these office managers to the regional office as claim reps.
```
4. Click the **Assign Claim Reps** link to the right of the office managers.

   The **Assign Claim Reps** window appears, listing the first 25 currently unassigned claim reps.

   ![Assign Claim Reps window](image)

5. Place a checkmark next to the claim reps that are assigned to the selected regional office.

   **Note:** This window contains links that allow you to view all unassigned claim reps, as well as import assigned claim reps to this window.

6. Click **Assign Claim Reps**.

   A window asks you to confirm the selection.

7. Click **OK**.

   The selected claim reps are assigned to the regional office.

**Assigning Claim reps to an Office Manager**

Once you've added an office manager to a regional office, you can add claim reps to the office manager.

1. From the **Regional Office** page, click the office manager you want to add claim reps to.

   The organization hierarchy for this office manager appears on the left side of the page.
2. Click the **Assign Claim Reps** link to the right of the selected office manager.

   The **Assign Claim Reps** window appears, listing the first 25 currently unassigned claim reps.

   ![Assign Claim Reps Window](image)

3. Place a checkmark next to the claim reps that are assigned to the selected office manager.

   **Note:** This window contains links that allow you to view all unassigned claim reps, as well as to import assigned claim reps to this window. This means that claim reps no longer need to upload completed estimates before you can assign them.

4. Click **Assign Claim Reps**.

   A window asks you to confirm the selection.

5. Click **OK**.

   The selected claim reps are assigned to the office manager.

   ![Organization Hierarchy](image)
Adjusters/Contractors

The Adjusters/Contractors module allows you to set up and maintain contractor service areas, notification methods, and job types and sizes. You can also disqualify contractors to have them removed from the assignment rotation.

Note: Some companies use a different name for contractors, such as "claim rep" or "franchisee." Despite the differences in the name, the basics for using the Adjusters/Contractors module are the same.

To edit contractor information in your contractor database,

1. Click Adjusters/Contractors from the Administration menu.

   The Contractors page appears.
2. Type the XactNet address of the contractor you’re looking for and click **Submit**.

If you are unsure of the contractor’s XactNet address, you can click the **Browse Address Book** link to select a contractor from your personal address book.

XactAnalysis looks up the contractor you entered and displays the information.

---

**The contractor’s name and address appears, as well as other information regarding the contractor’s work status.**

- **Job Type and Size** lets you select the types of jobs (i.e., general, emergency, etc.) and the size of jobs that the contractor is able to work on. This information is used when selecting a contractor in the automatic assignment rotation system, as well as when manually selecting a contractor.

- **Qualification Status** contains checkboxes used to indicate the contractors qualification status and assignment type.
- **Xactimate Profiles** displays the list of Xactimate profiles the contractor has installed as well as the most recent version of Xactimate installed the contractor is running. If the contractor becomes unqualified because the version of Xactimate is too old, then the contractor does not automatically become requalified when Xactimate is updated; you must do this manually.

- **Contractor Notifications** lets you define how contractors will be notified when they have new assignments or action items.

- **Service Areas** allows you to set up and maintain the service areas for the selected contractor. ZIP/postal codes by region or program location are used to define a contractor's service area. You can also specify individual ZIP or postal codes for a contractor. A service area map displays the states/counties/ZIP Codes that are covered.

If you don't know the contractor's entire XactNet address, you can enter a partial address in the XN Addresses field and press the Enter key. XactAnalysis displays a list of all contractors who have addresses that fit the partial XactNet address. You can choose the correct contractor from here.

If you're still unsure of the contractor's XactNet address, click the **Browse Address Book** link near the top of the page. The *XactNet Address Book* (see “XactNet Address Book” on page 36) appears. Click the link for the contractor's XactNet address to display the Contractor page for that contractor.

**DEFINING CONTRACTOR JOB TYPE AND SIZE**

XactAnalysis uses contractor job type and size to help find an appropriate contractor in the Send Work Assignments module. For more information on sending assignments to contractors, see “Creating an assignment” on page 131.

From the contractor’s page,

1. Click **Edit** next to the **Job Type and Size** header.

   The following page appears.

   ![Job Type and Size Page](image)

   This page displays the size and types of jobs a specific contractor is willing to work.

2. Mark the checkboxes for each size and type of job the contractor is willing and able to work. Click **Update**, then click **OK** to confirm your selection.

   XactAnalysis returns to the contractor's page.
QUALIFYING A CONTRACTOR

You can disqualify a contractor—either at the discretion of your own company or at the request of the individual contractor—by clicking the corresponding Disqualification checkbox on the Contractor Administration page. When contractors have been marked “disqualified” on this page, they are removed from the assignment rotation in the Send Work Assignments module.

From the contractor’s page,

1. Click **Edit** next to the **Qualification Status** header.

   The following page appears.

   ![Disqualification Checkboxes](image)

2. Click the **Disqualified by Carrier** checkbox, the **Disqualified by Contractor** checkbox, or both, depending on who has requested the disqualification.

3. Type the reason for the disqualification in the appropriate field.

4. Click **Update**, then click **OK** to confirm your selection.

If you want to requalify a contractor, you must know the contractor’s XactNet address. After entering the XactNet address and bringing up the contractor’s page, you can uncheck the **Disqualification** box(es) to requalify the contractor; XactAnalysis then places the contractor back in the assignment rotation.
SETTING UP NOTIFICATION
You can create assignment notifications and action item notifications. These notification setups determine how you contact this contractor whenever they are sent assignments and action items.

ASSIGNMENT NOTIFICATION
From the Contractor page,

1. Click Add New Notification.

   The Notification Rule Setup window appears.

   ![Notification Rule Setup Window]

   **Note:** This window may be slightly different, depending on the company/profile you’re using.

2. Click the Type drop-down button and select Assignment. Click Next.

3. Click the assignor you’re creating a notification for, then click Next.

   In most cases this will be your own company. If you have the option of more than one assignor, you can choose any assignor available from the list, or choose All.

4. Click the assignee you’re creating a notification for, then click Next.

   If you have the option of more than one assignee, you can choose any assignee available from the list, or choose All.

5. Enter the start time for notification if there is a time before which the contractor doesn’t want to be notified.

   Enter this time in Mountain Time. For example, if the contractor doesn’t want to be contacted before 8:00 A.M. Eastern Time, enter 6:00 AM in this field.

   If the contractor can be notified 24 hours a day, enter 12:00 AM in this field.

6. Enter the end time for notification if there is a time after which the contractor doesn’t want to be notified. Click Next.

   Enter this time in Mountain Time. For example, if the contractor doesn’t want to be contacted after 8:00 P.M. Pacific Time, enter 9:00 PM in this field.

   If the contractor can be notified 24 hours a day, enter 12:00 AM in this field.

7. Place a checkmark next to each day of the week you want this notification to be in effect. Click Next.

8. Enter the priority of the assignment you want assigned to this notification.

   For example, you might have your fax set to normal notification from 8:00 A.M. to 8:00 P.M. But you might also have another notification set up to notify you at all times on your pager for emergency assignments.
9. Select the type of loss for this notification, then click **Next**.

10. Highlight the contact method you want XactAnalysis to use to notify you, whether pager, fax, voice, or email. (See "Pager specifications" on page 72 for more information on pager notification.)

If you need to set up a new contact method,

a. Click **Add**.

   The *Add Contact Type* window appears.

This window will change, depending on the *Type* you select.

b. Click the drop-down button to determine the method of notification in the *Type* field.
   You can choose from e-mail, fax, pager, voice (telephone), or XactCentral (XactNet) address.

c. Enter the email address or number (depending on the type you selected).
   Skip the next step unless you selected pager or voice.

d. Enter the pager PIN (if using a pager) or the user (if using telephone).
   If these don't apply to your company, you can skip this step.

e. Click **Continue**.

   XactAnalysis displays the new contact in the *Notification Rule Setup* window. Click **Add** to add additional contact methods.

11. Click **Next**.

12. Click **Finish**.

   The new notification method appears in the contractor page under the *Contractor Notifications* window.

   This new notification means that emergency assignments from Rockford can be sent to this contractor 24 hours a day at the email address displayed.
**PAGER SPECIFICATIONS**
Your pager must fit the following specifications:

- Your pager must be alphanumeric. Digital pagers will not work.
- The paging company must support TAP (Telocator Alphanumeric Input Protocol) to receive alphanumeric page notifications.

You must send Xactware the following information about your pager:

- The phone number to which Xactware will send the alphanumeric pages. This is not the phone number for the pager itself. The paging company will have a separate phone number connecting to a modem for alphanumeric pages and is usually different for different geographic regions. Your paging company can supply you with this information if you’re unsure.
- The PIN (personal identification number) for the specific pager. Since all alphanumeric pages go to the same number for a given area, this is how the paging company distinguishes between pagers (the PIN for the pager may be the pager number itself, but this should be verified with your paging service). Your paging company can supply you with this information if you’re unsure.

*Note: Many companies have the option to send a page through e-mail. If the option is available, you can use this as an alternate method; however, this method would need to be set up as an “e-mail” notification rather than a pager notification.*

**ACTION ITEM NOTIFICATION**
From the contractor page,

1. Click **Add New Notification** under the **Contractor Notifications** header.

   The **Notification Rule Setup Wizard** appears.

   ![Notification Rule Setup Wizard](image)

   *Note: This window may be slightly different, depending on the company/profile you’re using.*

2. Choose **Action Item** from the **Type** drop-down list.
3. Click the assignor you’re creating an action item for.
   
   In most cases this will be your own company. If you have the option of more than one assignor, you can choose any assignor available from the list, or choose All.
4. Click the assignee you’re creating a notification for.
   
   If you have the option of more than one assignee, you can choose any available from the list, or choose All.
5. Enter the start time for notification if there is a time before which the contractor doesn’t want to be notified. Enter this time in Mountain Time. For example, if the contractor doesn’t want to be contacted before 8:00 A.M. Eastern Time, enter 6:00 AM in this field. If the contractor can be notified 24 hours a day, enter 12:00 AM.

6. Enter the end time for notification if there is a time after which the contractor doesn’t want to be notified. Enter this time in Mountain Time. For example, if the contractor doesn’t want to be contacted after 8:00 P.M. Pacific Time, enter 9:00 PM in this field. If the contractor can be notified 24 hours a day, enter 12:00 AM.

7. Place a checkmark next to each day of the week you want this notification to be in effect.

8. Enter the contact method you want XactAnalysis to use to notify you, whether pager, fax, voice, or email. (See “Assignment notification” on page 70 for information on contact methods.)

9. Click Next.

The new action item appears in the Notification Setup page.

<table>
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<tbody>
<tr>
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<tr>
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</tr>
<tr>
<td>Assignment</td>
</tr>
</tbody>
</table>

This new notification means that all action items from Alliances can be sent to this contractor 24 hours a day at the e-mail address displayed.
**DEFINING SERVICE AREAS**

A contractor’s service area is made up of the 5-digit ZIP and 6-character postal codes where that contractor performs work. Unlike price list areas and program locations, a ZIP/postal code can be assigned to more than one contractor’s service area, so linking a ZIP/postal code to a service area does not remove it from another service area.

Click **Edit** next to the **Service Areas** header to see the **Define Service Area** page.

---

![XactAnalysis screenshot](image)

You can assign ZIP/postal codes in a region or program location to a contractor’s service area.

To assign ZIP/postal codes in a region to a contractor’s service area,

1. Click **Assign** next to the region name.
   
   A confirmation window asks if you’re sure you want to do this.

2. Click **Assign**.
   
   XactAnalysis assigns all the ZIP/postal codes within this region to the contractor’s service area.

3. Click **Close**.
You can click on a region’s name to view the program locations that make up the region. In addition, you can click a program location to see its ZIP/postal codes. You can use this process of clicking **Assign** to assign the ZIP/postal codes found in any region or program location to the contractor’s service area.

You can drill-down as far as the ZIP Code level to assign ZIP/postal codes to a service area.

Click **Copy ZIP/Postal Codes** to copy all the contractor’s ZIP/Postal codes into the Windows clipboard, which allows you to paste the codes into another program or into another contractor’s list.

You can assign any individual ZIP or postal code by typing the ZIP or postal code and clicking **Add** from the right of the **Service Areas** window.
**Coverage Areas**
The Coverage Areas module displays a map that shows you the number of contractors/adjusters per job type your company can use in each state.

To view your contractor coverage,

1. Click **Coverage Areas** from the Administration menu.

   The Coverage Areas window displays a map of the United States, delineated by state.

   ![Coverage Areas Map](image)

   All states are coded so you can see the number of contractors in each.

2. Click the **Carrier drop-down button** to select the carrier you want to view contractor coverage for.
   
   You may not see this step.

3. Click the **Job Type drop-down button** if you would like to view contractor coverage for a specific job type only, e.g., emergency, general, etc.
4. Click on any state to drill down to the county level.

5. Click on any county to drill down to the ZIP Code level.
6. Click a ZIP code to view the contractors assigned to this ZIP code.

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<td>BELOIT, OH 44606</td>
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<td>Donald Winter</td>
<td>WINTER, WY, NEBRASKA</td>
<td>462 RIDGEMONT</td>
<td>RENO, NV 89507</td>
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<tr>
<td>6</td>
<td>Blake Black</td>
<td>STEEL, MONTANA</td>
<td>321 WASHINGTON AV</td>
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<td>7</td>
<td>Carol Blackweld</td>
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<td>8</td>
<td>Valerie Scott</td>
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<td>Cooper Jones</td>
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<td>15</td>
<td>Valerie Byrd</td>
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<td>16</td>
<td>Nancy Blair</td>
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<tr>
<td>18</td>
<td>Mike Henry</td>
<td>HENRY, ID, IDAHO</td>
<td>875 MOUNTAIN</td>
<td>DOHENY, ID 59604</td>
</tr>
<tr>
<td>19</td>
<td>Charlie Seaver</td>
<td>SEVER, ID, IDAHO</td>
<td>1514 CENTER STW</td>
<td>FOCOELLO, ID 39046</td>
</tr>
</tbody>
</table>
**PROGRAM RULES**
Program rules allows carriers to set up the criteria they can use when they want XactAnalysis to notify them of issues with their service providers. When working with the Program Rules module, it’s best to remember that the “assignor” is the creator of the assignment (in most cases, this means you, the insurance carrier). The “assignee” is the recipient of the assignment; i.e., the service provider.

To set up and make changes to your service providers parameters, click **Program Rules** from the Administration menu. The Program Rules page appears. The rules you can set up here apply to your entire program, nationwide. The three parts of program rules are notification setup, assignee certification, and assignment escalation.

**NOTIFICATION SETUP**
Notification Setup allows you to determine exactly who should be notified regarding Assignee Certification issues (see “Assignee certification” on page 82) and Assignment Escalation issues (see “Assignment escalation” on page 84). Notification is handled by location; i.e., notifications for all service providers in a specific location will go to the employee you set up to handle these notifications. You can set up multiple employees to be notified for any location, and you can also set up any employee to receive notifications for multiple locations.

From the Program Rules page, click the Notification Setup tab to see the Notification Setup window.

From this window, you can add, edit, and delete notification parameters for your employees.
**ADDING AN EMPLOYEE FOR NOTIFICATION**

To add an employee to your notification list,

1. Click **Add New Rule**.

   The *Notification Rule Setup* window appears.

![Notification Rule Setup Window](image)

2. Enter the employee’s first and last name.

3. Enter the employee’s e-mail address.

   This is the address XactAnalysis will send notification to.

   *Note:* If you have a mobile email address (such as web messaging on your cell phone), check the **This is a mobile device** checkbox. This limits notifications to 115 characters.

4. In the *Hierarchy Location* area, click the **Carrier drop-down button** to select which carrier this recipient needs notification for.

5. Click the **Hierarchy Type drop-down button** to instruct XactAnalysis to warn the recipient if an issue occurs in a geographic region, for an organizational group, or for a specific individual.

   After you’ve made your selection, the window will change to display the *Area* field (if you selected Geographic), the *Adjuster* field (if you selected Individual), or company organizational fields (if you selected Organizational).

   *Note:* The hierarchy of your location will probably appear to be different from the hierarchy shown in this user’s guide, and you may have more levels. The basic functions for each level work the same way.

6. If, in the *Hierarchy Type* field, you selected:

   **Geographic**
   
   a. Click the **Area SmartList button**, then drill-down within the window that appears to select the regions/program locations that will trigger a notification for this recipient.
   
   b. Click the **Select** button to return to the *Notification Rule Setup* window.

   **Organizational**
   
   a. Click the Regional Office SmartList button, then click the regional office that contains the team of individuals that will trigger notification for this recipient.
   
   b. If you need to further filter this list, click the office manager team that contains the individuals that will trigger notification for this recipient.
Individual

a. Click the **Adjuster SmartList button**.

b. From within the window that appears, either type the name of the individual who will trigger notification, or click the first letter of the individual’s name.

c. If you typed the individual's name, click **Submit**. If you clicked a letter, click the individual's name.

7. In the **Notification Rights** area, click to mark the checkboxes to indicate whether you want this employee to be notified of Assignee Certification issues (problems with your service providers’ XactAnalysis certification), Assignee Escalation issues (problems with the time it takes for your service providers to respond to an assignment), or both.

8. Click **OK**.

The new employee notification appears in your notification list.

---

You can repeat these steps to add as many notification rules as necessary for your company.
EDITING AN EMPLOYEE’S NOTIFICATION SETUP
To edit an employee’s notification setup, click **Edit** next to the notification rule you want to modify. When you see the Notification Rule Setup window appear, you can modify any field as necessary, then click **OK**.

DELETING AN EMPLOYEE’S NOTIFICATION SETUP
To delete an employee’s notification setup, simply click **Delete** next to the notification rule you want deleted, then click **OK** in the window that appears.

ASSIGNEE CERTIFICATION
Assignee Certification allows you to set up your requirements for your service providers, and determine whether they must be XactAnalysis certified.

To set up Assignee Certification,

1. Click the **Assignee Certification** tab from the Program Rules window.

   The Assignee Certification window appears.
2. Click to mark the first checkbox if you require all service providers/assignees to be certified with XactAnalysis. Once you click the checkbox, this window expands to include a number of other certification options.

![XactAnalysis - Program Rules](image)

If you do *not* require XactAnalysis Certification for your service providers, make sure the checkbox is *unchecked*, then click **Save Changes**, as you are finished with this section. If you *do* require XactAnalysis Certification for your service providers, continue on to **step 3**.

3. Enter the date that you require all service providers to be certified.

4. Click to mark the next checkbox if you want a CSI (Consumer Satisfaction Index) survey sent out to all customers of assignments who have an e-mail address listed.

This survey allows you to see feedback from your service providers' customers.

5. In the Expiration of Certificates—Notification area, click to mark each checkbox to indicate when you want XactAnalysis to notify your company regarding the expiration date of each certificate.
   - **Assignee Certification Status**: refers to the service provider's status as a Certified XactAnalysis user.
   - **License Certificates**: refers to the licensing required for a service provider to be a Certified XactAnalysis user.
   - **Insurance Certificates**: refers to the state insurance requirements necessary for a service provider to be a Certified XactAnalysis user. Not all states require this insurance certificate.

   *Note*: These certifications are entered by service providers when they sign up as XactAnalysis Certified providers.

   *Note*: If you choose one or more of the notification options, you must set up who exactly in your company is to be notified by entering this information in Notification Setup (see "Notification setup" on page 79).

6. Click **Save Changes**.

   XactAnalysis saves the changes you've made.
**ASSIGNMENT ESCALATION**

The *Assignment Escalation* section handles assignments that are not promptly taken care of by the selected service provider. If prompt service is not given to the customer, you can set up XactAnalysis to notify you, rotate the assignment to the next service provider, or both. Assignment Escalation is simply XactAnalysis “escalating” an assignment to the next service provider or back to you.

For example, you can set up normal, non-cat assignments to rotate to the next service provider if there is no response five days after you send the assignment. You can also set an emergency assignment to rotate to the next service provider (and notify you of the service provider’s non-action) if there is no response within 12 hours.

To set up assignment escalation, click the *Assignment Escalation* tab from any of the *Program Rules* pages. The *Assignment Escalation* window appears.

![Assignment Escalation Window](image)

From here, you can add, edit, and delete sets of criteria affecting the escalation of your assignments.
**ADDING AN ASSIGNMENT ESCALATION**
To add assignment escalation, you will be entering an amount of time that must occur between two “events” (for example, the service provider receiving an assignment, and the service provider returning the assignment), and defining the action you want to occur once XactAnalysis is aware of an improper amount of time occurring between the events.

1. Click **Add New Rule**.
   The Assignment Escalation Rule Setup window appears.

2. Select the data set for this rule in the drop-down list for #1.
3. Select the priority of assignments in the drop-down list for #2.
   You can select Normal, Emergency, or both.
4. Select the cat-status of assignments in the drop-down list for #3.
   You can select Catastrophe, Non-catastrophe, or both.
5. Select the two events you want to use elapsed time between to determine escalation.
   You can use the drop-down lists to enter these events.
6. Enter the amount of time that must be exceeded between the two events for escalation to occur.
   Do this by entering the number in the first field, then clicking to select days/hours/minutes.
7. Click to mark the checkbox indicating the action you want XactAnalysis to take once escalation has taken place.
   
   **Note:** If you choose the Notify us option, you must set up who exactly in your company is to be notified by entering this information in Notification Setup (see “Notification setup” on page 79).
8. Click **OK**.
   The new escalation appears in the Assignment Escalation window.

You can create any number of different escalations to account for different types of assignments, as well as different cat-status assignments.
**EDITING AN ASSIGNMENT ESCALATION**

To edit an assignment escalation, simply click **Edit** next to the escalation rule you want to modify. When you see the *Assignment Escalation Rule Setup* window appear, you can modify any item as necessary, then click **OK**.

**DELETING AN ASSIGNMENT ESCALATION**

To delete an assignment escalation, simply click **Delete** next to the escalation rule you want deleted, then click **OK** in the window that appears.
PERSONAL RULES
The Personal Rules module allows you to set up your own notification, so that XactAnalysis will notify you when a service provider triggers “red flags” (or personal rules) you set up yourself. When working with Personal Rules, it’s best to remember that the “assignor” is the creator of the assignment (in most cases, this means you, the insurance carrier). The “assignee” is the recipient of the assignment; i.e., the service provider.

Click **Personal Rules** from the Administration menu to see your Personal Rules window.

Enter the email address you want your notifications sent to in the field at the top of the window. Click **Update Email** if you make changes to the email address.

From here, you can add, edit, or delete these rules.

*Note: To view a list of all personal rules, see Appendix C, “XactAnalysis Personal Rules.”*
**ADDING A PERSONAL RULE**
To add a personal rule,

1. Click **Add a new rule**.

   The *Personal Rule Setup* window appears.

![Personal Rule Setup Window](image)

*Note:* If you have not entered an e-mail address in the *Personal Rules* window, do so at this time.

2. Click the **drop-down list buttons** to select that data set that you want to trigger the personal rule.

3. Click the **drop-down list button** to select the category that contains the event that triggers the red flag.
4. Click the **Event drop-down button** to select the incident you want to be notified of.

The drop-down list that appears is dependent on the selection you choose in the **Category** field.

When you choose the Event category, additional fields appear that will be different, depending on the answer you select for the **Category** and **Event** fields. Answer the fields for steps 5–10 as closely as your individual selections allow.

5. Enter the event’s frequency, priority, type, catastrophe code, coverage types, type of loss, desk adjuster, reviewer, and reviewed by, as requested.

You can enter multiple catastrophe codes, if necessary.

6. Click a radio button to indicate whether you want to be notified of each assignment that shows a red flag, or of each XactAnalysis monthly cached reports that shows a red flag.

Some events will select this option for you.

7. If there is an amount or percent you want to be notified of if the service provider differs, click the appropriate checkbox, then enter this amount/percent in the field, and click **Dollars** or **Percent** as necessary.

8. Place a checkmark next to each coverage type the returned estimate contains, if the personal rule calls for it.
9. Click the **Hierarchy Type drop-down button** to instruct XactAnalysis to warn you if the issue occurs in a geographic region, an organizational group, or for a specific individual.

After you’ve made your selection, the window will change to display the **Area** field (if you selected Geographic), the **Adjuster** field (if you selected Individual), or company organizational fields (if you selected Organizational).

*Note:* The hierarchy of your location will probably appear to be different from the hierarchy shown in this user’s guide, and you may have more levels. The basic functions for each level work the same way.

10. If, in the **Hierarchy Type** field, you selected:

   **Geographic:**
   a. Click the **Area SmartList button**, then drill-down within the window that appears to select the regions/program locations that will trigger the notification.
   b. Click the **Select** button to return to the Notification Rule Setup window.

   **Organizational:**
   a. Click the **Regional Office SmartList button**, then click the regional office that contains the team of individuals that will trigger notification.
   b. If you need to further filter this list, click the office manager team that contains the individuals that will trigger notification.

   **Individual:**
   a. Click the **Adjuster SmartList button**.
   b. From within the window that appears, either type the name of the individual who will trigger notification, or click the first letter of the individual’s name.
   c. If you typed the individual’s name, click **Submit**. If you clicked a letter, click the individual’s name.

11. Click **OK**.

The **Personal Rule Setup** window closes and the new rule appears now in the **Personal Rules** window.

---

**EDITING A PERSONAL RULE**

To edit a personal rule, simply click **Edit** next to the personal rule you want to modify. When you see the Personal Rule Setup window appear, you can modify any item as necessary, then click **OK**.

**DELETING A PERSONAL RULE**

To delete a personal rule, simply click **Delete** next to the personal rule you want deleted, then click OK in the window that appears.
ADDING ELAPSED TIME RULES

Elapsed time personal rules allow you to set up rules for notifications of the elapsed time between different assignment statuses.

To add an elapsed time rule,

1. From the Personal Rules window, click **Add Elapsed Time Rule**.
   The Elapsed Time Rules window appears.

2. Click the drop-down list buttons to select that data set that you want to trigger the elapsed time rule.

3. Enter the event’s priority and type.

4. In the *between* field, select the first status you want XactAnalysis to use to trigger this rule.

5. In the *and* field, select the second status you want XactAnalysis to use to trigger this rule.

6. In the *Exceeds* field, enter the amount of time you want to pass between the two statuses (in steps 4–5) before the rule is triggered.
   You can specify a set number of days, minutes, or hours.

7. Click the Desk Adjuster SmartList button to select the desk adjuster you want to filter assignments by.

8. Click the **Hierarchy Type drop-down button** to instruct XactAnalysis to warn you if the issue occurs in a geographic region, an organizational group, or for a specific individual.
   After you’ve made your selection, the window will change to display the Area field (if you selected Geographic), the Adjuster field (if you selected Individual), or company organizational fields (if you selected Organizational).
   
   Note: The hierarchy of your location will probably appear to be different from the hierarchy shown in this user’s guide, and you may have more levels. The basic functions for each level work the same way.

9. If, in the *Hierarchy Type* field, you selected:
   Geographic:
   a. Click the Area SmartList button, then drill-down within the window that appears to select the region/program location that will trigger the notification.
   b. Click the Select button to return to the Notification Rule Setup window.

   Organizational:
   a. Click the Regional Office SmartList button, then click the regional office that contains the team of individuals that will trigger notification.
   b. If you need to further filter this list, click the office manager team that contains the individuals that will trigger notification.

   Individual:
   a. Click the Adjuster SmartList button.
   b. From within the window that appears, either type the name of the individual who will trigger notification, or click the first letter of the individual’s name.
c. If you typed the individual’s name, click Submit. If you clicked a letter, click the individual’s name.

10. Click OK to save and apply this personal rule.

**VIEWING ANOTHER USER’S PERSONAL RULES**

If you have the rights to view another user’s Admin Info, you can also view that user’s personal rules. You will not be able to change the personal rules.

To view another user’s personal rules,

1. Click the **Administration** menu and choose **User Administration**.

2. Click the user name of the user whose personal rules you want to view.

   The *Edit User* window appears.

3. Under **User Properties**, look for the link that displays the number of personal rules created by the user.
4. Click the **personal rule(s)** link to see a list of the actual rules for the user.
**USER ROLES**
User roles allows you to define the rights of individual users who you administer to. You can create a user role and define its application rights; then when you assign a user role to a user, these application rights are automatically assigned to the user.

**CREATING USER ROLES**
Before you can add user roles to a user, you must first create them. To do this,

1. Choose **User Roles Admin** from the *Administration* menu.
   
   If you don’t have the rights to select this option, you can see your administrator.

2. Click **Add a User Role** if this is the first user role to be created, or **Create a new User Role** if other roles have already been created.
   
   The *Add User Role* window appears.

3. Type the name of the role, then click **Add User Role**.
   
   The user role is added to the *Currently Defined User Roles* list.

4. Click **Role Rights** next to the role you just created.
   
   A list of application rights appears.

5. Place a checkmark next to each right that users with this role type are typically given.

6. Click **Save Role Rights**.
   
   The role is updated with your most recent changes.

7. Repeat steps 2–7 until you have entered all the roles you need.
   
   You can now assign these roles to individual or multiple users.

**ASSIGNING USER ROLES**
Once you (or another administrator) has created user roles, you can now assign these roles to users.

1. Choose **User Administration** from the *Administration* menu.
   
   The *User Admin* window appears.

2. Click the user name of the user you want to assign a user role to.
   
   The *Edit User* window appears.
3. Under *User Role*, click the drop-down button and select the role you want to assign this user.

4. Click **Apply**.

   XactAnalysis applies all application rights assigned to that role to the user.

   *Note:* The user role only adds application rights; it will not remove any application rights that have been previously added to this user.

5. Click **Save**.

   The changes to this user have been saved.
XactAnalysis Preferences

XactAnalysis Preferences is an option that allows you to customize how certain features will work for members of your organization. You can select this option by choosing XactAnalysis Preferences from the Administration window.

MODIFYING PREFERENCES

To modify your company’s preferences,

1. Choose XactAnalysis Preferences from the Administration menu.

2. Select the data set you want to modify preferences.
   You can choose any data set you have the rights to modify.

3. To the right of the preference you want to modify, click Change.
   The Change Preference window appears.

4. Click the radio button that represents the preference you want used for this data set.
   In most cases, you will only need to choose Y (yes) or N (no).
You will not see this menu option unless *XactAnalysis Preferences* has been set up for you as an application right from within *User Administration* (page 20). You can set this preference up for yourself if you have the rights to modify your own user rights.
USER SEARCH COLUMN ADMIN
The User Search Column Admin feature allows you to customize your company’s columns for the Advanced Search Results (page 102) page.

CREATING A NEW SET OF COLUMNS
To create a new set of columns for your Advanced Search Results page,

1. Click the Administration menu and choose User Search Column Admin.
   
   Note: If this option is not available to you, see your supervisor or user administrator.
   
   The Personal Column Management page appears.

2. If necessary, make sure you’ve selected the correct account in the Account field.

3. Click the Create New Set link next to the Set field.

4. Type the name of the new set in the Set Name field that appears, then click Create.

   XactAnalysis creates a new set, based on the set that was previously selected.
The *Column Management* page displays the following lists:

- **Available Columns**: this list displays the columns that will not appear in the *Advanced Search Results* page when you use this set. The items in this list will either be blue (normal options) or green (tied to a carrier preference).

You can move a column to the *Selected Columns* list (where it must be to have the column appear in the Advanced Search Results page) by left-clicking on it.

- **Selected Columns**: this list displays the columns that will appear in the *Advanced Search Results* page when you use this set. The list order also displays the columns in the order that they will appear. The items in this list can be blue (normal options), green (tied to a carrier preference), or yellow (required and cannot be removed).

You can click **X** to move the column out of the *Selected* list (which will actually remove it from the Advanced Search Results page), click **↑** to move a column higher in the list (which will actually move the column further to the left on the Advanced Search Results page), or click **↓** to move a column lower in the list (which moves the column further to the right in the Advanced Search Results page).

Using the column set on the left would produce results similar to the *Advanced Search* window below.
CUSTOM REPORT GROUPS

Custom Reporting Groups allows you to build groups containing individuals you want to see report information for. You can create these groups by selecting one of the Custom Reporting Groups options from the Administration menu. For example, you can set up a new group called Group A and then add five adjusters to the group. When you run a report, you can select Group A, and the report provides data based on the individuals who are part of that group.

**Note:** You can speak to your account representative to have this option enabled for your company.

If you don’t see the Custom Reporting Groups options from your Administration menu, see your XactAnalysis administrator to have these rights added to you from User Admin: Application Rights.

To create a group,

1. Click Custom Reporting Groups Adjusters from the Administration menu.
   The Custom Reporting Groups page appears.

2. Click Add Group.
   The Add Group window appears.

3. Type the name of the group in the Name field, then click Save.
   XactAnalysis informs you that the group is saved.

4. Click OK.
   The Edit Group window appears.

5. Click Assign Adjuster.
   A row of fields appears where you can add information about the adjuster you are adding to the group.

6. Type the XactNet address of the first adjuster you are adding to the group.

7. Enter the date you want XactAnalysis to begin including this adjuster in this reporting group.

8. Enter the date you want XactAnalysis to stop including this adjuster in this reporting group.

9. Click Save at the right of this row.
   XactAnalysis saves this adjuster to the group.

10. Repeat steps 5–9 to add any additional adjusters to the group.

11. When finished, click the Save button at the top of this window.
   XactAnalysis saves the group, which you can now use to view reports for.

You can speak to your account representative to have this option enabled for your company.
Chapter 3
Assignments

XactAnalysis offers leading edge management tools that harness the power of its communications extranet to help you stay on top of your assignments and estimates.

XactAnalysis users can access some or all of the following sections:

- Advanced Search
- Send Work Assignment
- Estimate Review Queue
- XactAnalysis Assignment Queue
- XactAnalysis Assignment Queue by ZIP
**ADVANCED SEARCH**

The *Advanced Search* page allows you to select specific parameters for the assignments you want to track. For example, you can specify the actual claim number, customer, sender, status, and date range to be tracked by setting filters to exclude all other XactAnalysis transactions.

*Note: Your version of XactAnalysis may differ slightly from the description below, but the basic steps remain the same.*

To set the search filters,

1. Click **Advanced Search** from the *Assignments* menu.

The *Advanced Assignment Search* page appears.

![Advanced Assignment Search](image)

*Note: This window may look different from what is displayed here, depending on the data set you choose and the company you are in. The basic steps should remain the same.*

If you are looking for a specific assignment, enter the assignment’s claim number or the name of the insured in the proper field, then skip to step 6. If you are looking for a specific type of assignment, continue on to step 2. You can skip any step between steps 2–5 if you don’t want to use that criteria to filter your assignments list.
2. Fill in any of the search criteria you want to use to filter the assignments by.

This includes data set, hierarchy (you can select multiple hierarchy options), claim number, insured name, adjuster/contractor name, claim rep code, cat code, XactNet address (including individual users with the same XactNet address), desk adjuster, ZIP/postal code, state or province, assignment type, job type, type of loss, policy type, XactAnalysis status, workflow status, file status, XactCentral status, collaboration status, Psychrometrics, third-party, audit results, referral status, onsite reinspection, review status, approval status, and reassignment status.

Note: The more filters you use, the smaller the list of assignments that fit the criteria will be. Use more filters only if you want a very exact assignment list.

3. For the last three fields under Filter Criteria, choose the proper selections to determine how you want the assignment list to look.

This includes normal/test assignments, number of assignments to be displayed for each page, and column set ("User Search Column Admin on page 98").

4. Under the Filter Dates header, accept the Date Received default, or click the drop-down list button to select one of the following filter options: Date Delivered, Date Entered Queue, Date of Loss, Date Returned, Date Corrected, Date Canceled, or Date Rejected.

5. Define the span of time to be included by setting starting and ending dates using the Calendar buttons in each field.

6. Click Submit to search the entire assignments list and view the results.

The Search Results page appears.

You can change the sort order of a filter’s results by clicking the heading you want to sort by. The small red arrowhead moves to the new column and the filter’s results are re-ordered.

This Search Results page displays the claim number for each assignment, the name of the insured, the adjuster, the assignment’s status, and date of each status. In addition, any returned assignments display the small red arrowhead indicates the column the search results are sorted by. If you click the column header again, the column sorts in reverse order. Click a different column header to sort by that header.
the gross estimate total, along with a small icon, indicating whether there are notes, digital images, documents, or Sketch images attached.

7. Click an assignment’s Claim # hypertext link to view the details about an individual assignment. The Assignment Details page appears.

This page displays some of the details of the selected assignment, including the status, and the date and time of each transaction. In addition to the Details page you see here, you can also click the tabs to see a Client/Policy page, a Map page, an Action Items page, a Notes page, Documents, Photos, and Sketches. Click on each of these tabs to view the information associated with it.
DETAILS PAGE
The Details page is the first page you see in Assignment Detail. This page displays the assignee (contractor) information, collaboration information (if the assignment has one), and the status of the assignment. Most of the statuses that appear in the upper portion of the window are all system-based statuses that are automatically tracked by XactAnalysis. The statuses in the lower portion of the window must be updated manually by either you or the contractor.

When you update the statuses in the lower portion of the window, you don’t need to enter a date when the task has been accomplished; you simply click Update, then click Update Status within the Update Status window that appears. You can enter any notes, and enter an e-mail address to inform any relevant individual that the status has been updated. XactAnalysis also tracks the individual who entered notes, whether assignee, assignor, or collaborator.

The following tasks will usually be accomplished by the contractor:
- Customer Contacted: lets the carrier know that the customer was contacted.
- Site Inspected: lets the carrier know that the property has been inspected.
- Job Started: lets the carrier know that the job has been started.
- Job Completed: lets both parties know that the job has been completed.
- Job Not Sold: lets both parties know that the client or property owner has refused the job.
- XactCentral File Status: updated by some contractor companies to show when an estimate is In-Progress or Closed.

The following tasks are usually accomplished by the carrier:
- Reviewer Assigned: the completed estimate has entered the estimate review queue to be reviewed, and the review administrator has assigned it to a specific reviewer to complete the review.
- Review Accepted: the person assigned to complete the review has accepted the review from the administrator.
- Reviewed with Exceptions: the reviewer completed reviewing the assignment but rejected it. In this case, work usually has to be done on the estimate, which is then uploaded again, and a subsequent review is performed on it.
- Review completed: this is usually handled in the Estimate Review Queue module.
- QA approved: quality assurance has been met and the job can begin (this status date can be hidden).
- Client approved: this option is usually necessary only when a third-party reviewer is being used (this status date can be hidden).
- File Status: this optional status allows the carrier to mark the assignment Closed (this status date can be hidden).
- File closed: lets the carrier know that the assignment has been completed.

The following tasks can be accomplished by anyone with appropriate rights:
- Collaboration Status: allows any user with collaboration rights to check out an estimate for collaboration, and shows the date/time of any collaborations that have occurred on the assignment.
- Attention Status: allows any user to mark an assignment as Attention Needed, meaning the assignment is high priority. Can also be set from Send Work Assignment, or when an EDI assignment is created.
**CLIENT/POLICY PAGE**

The *Client/Policy* page displays the property owner/loss information for the assignment.

<table>
<thead>
<tr>
<th>Details</th>
<th>Client/Policy</th>
<th>Map</th>
<th>Action Items (0)</th>
<th>Notes (4)</th>
<th>Documents (19)</th>
<th>Photos (0)</th>
<th>Sketches (0)</th>
<th>Activity Log</th>
</tr>
</thead>
</table>

**PROPERTY OWNER / RISK INFORMATION**

- **Policyholder Name:** Francis
- **Address:** 2216 E. Victoria Ln, Fayetteville, AR 72701, US
- **Home Phone:** (479) 555-7143 - Primary
- **3rd Party Claimant:** Phone:
- **Risk Location:** 2216 E. Victoria Ln, Fayetteville, AR 72701, US
- **Business Phone:**
- **Mobile Phone:**
- **Pager:**
- **Email Address:**
- **Property Access Contact:** Phone:

**CLAIM INFORMATION**

- **Type of Loss:** Fire
- **Job Type:** Emergency
- **Job Size:** Mod..$3,500.00-$10,000.00
- **Claim #:** 123456789
- **Claim Rep:** Bob Pierce
- **CAT Code:**
- **Program Location:** Fayetteville Area
- **Adjuster:** Test Contractor - CAF
- **Prior List Area:** ARFA7X_MAY10

**Description of Loss and/or Instructions:**

- From: Safe Harves - Staff

**ASSIGNMENT PROFILE:**

- **Type:** Emergency
- **Claim Rep:**
- **Date of Loss:** 05/11/2010
- **Claim Number:** 123456789
- **Insured Name:** Francis
- **Day Phone:** (606) 000-0000
- **Evening Phone:** (479) 555-7143

**Cause of Loss:** Fire

- **Job type:** Emergency
- **Location of Property:** 2216 E. Victoria Ln, Fayetteville, AR 72701

**Instructions:**

- Assignment Received by XactAnalysis: 05/11/2010 10:28AM MT
- (XactAnalysis ID: 80228KG)

**Is there a potential Subrogation issue on this claim:** No

**Explain:**

**POLICY INFORMATION**

- **Policy Type:** Homeowner
- **Inception Date:**
- **Policy Number:** 889855241409
- **Effective Date:**
- **Expiration Date:**

- **Apply Deductible:** Coverage Specific
- **Apply Limits:** Yes
- **Coverage Type:** Policy Limit
- **Policy Limit:** Deductible
- **Apply To:** ITV Reserve
- **No coverage information is available.**

**Mortgage Holder:**

- **Is Attention Needed:** No

*All times are Mountain Time*
**MAP PAGE**
The *Map* page displays a map of the area surrounding the property, provided by MapQuest®. You can zoom in or out to further refine your map.

![Map Page](image)

You can click the - on the left side of the map to zoom out and see a greater space on your *Map* page, or click + to zoom in for a close-up. The *Map* page also displays the global position of the address (or the ZIP if it can’t locate the exact address).

*Note:* These coordinates will also appear on any email or fax assignment notifications. The email also includes a link to MapQuest to view the loss location map.

**ACTION ITEMS PAGE**
The *Action Items* page displays a list of action items that relate to this assignment (an “action item” is a task that needs to be accomplished or followed up by the person assigned to the action item).
Adding an Action Item
To add an action item to an assignment,

1. Click Add Action Item from the Action Items page.
   The Add Action Item window appears.

2. Click one of the To Be Performed By radio buttons to indicate who needs to accomplish this task.
   You can select either the assignee (contractor) of the assignment or yourself (the creator of the action item).

3. Make sure the Notify When... Created checkbox is marked if you want the assignee to know you've created this action item.

4. Make sure the Notify When... Past Due checkboxes are marked for the individuals you want to know when the action item is past its determined due date (see step 8).
   You can select the assignee, yourself, or both.

5. Choose the radio button for either a Custom or Standard action item.
   Custom action items are action items that you create; if you selected this option, continue on to step 6.
   Standard action items have already been set up for you by XactAnalysis; if you select this option, skip to step 7.

6. If you selected Custom, enter the action item in the field provided, then skip to step 8.
   Skip this step if you selected Standard.

7. If you selected Standard, click the drop-down list button to choose an action item.
   You can choose from the following system-based action items (which XactAnalysis tracks): Download Assignment, Upload Correction, Upload Estimate, Upload Non $0 Estimate, and Upload Report. You can also select any of the following action items that will have to be reported by the individual performing the action item: Contact Customer, Complete Job, Complete XactCentral File, Inspect Job Site, and Start Work.
8. Click a radio button to indicate the number of days in which this action item is due. If you click Other, select the due date from the calendar that appears. The correct date appears in the Due Date field.

9. Enter the time that this action item would be considered past due.

10. Enter any notes regarding this action item.

11. Click Save.

The action item now appears in the Action Items page.

You can update or delete any action item that is not a Standard, system-based action item.

NOTES PAGE
You can add notes to your assignments that allow you to communicate with all parties who have access to this assignment. When a claim has been reassigned, the notes for the previous assignment are listed separately (as shown below). A number appears under the column in the Results window if there are any notes already attached to the assignment. To see the assignment's notes, click the Notes tab from the Assignment window. The Notes page appears.

![Notes page screenshot](image-url)
To add a note to this assignment,

1. Click **Add a Note**.

![Add a Note dialog box](image)

2. Type the text of the note in the *Note* field.
   
   You can add formatting such as bold, italics, and underline, as well as spell-check/grammar-check your notes.

3. Type the email address and/or XactNet address of an individual you want to email this note to.

4. Checkmark the following options if you want to use them:
   - Send a copy of the email to the assignee.
   - Exclude the note from users of XactAnalysis for Service Providers.
   - Include the text of the note in an email (so that the receiver of the email doesn’t have to log into XactAnalysis to see it).
   - Send a copy of the email to the assignment’s desk adjuster.

5. Click **Add Note**.
   
   A warning message appears, informing you that the note cannot be edited or deleted once it’s been added.

6. Click **Yes**, then click **OK** to finish adding the note.

   You can now see the note as it appears with the assignment.

*Note: You can turn off the option of sending notes to an XactNet address by contacting your Xactware national sales account representative.*
DOCUMENTS PAGE

Once an assignment has been completed and returned to XactAnalysis, it will have a number of documents attached to it, such as the Report Rough Draft, Price List Variation Usage Report, and Audit report.

Click the Documents tab from the Assignment Detail page to see any documents currently attached to an assignment. Click on the document link to open each document in a new browser window.

You can approve and reject documents by clicking the document's checkbox and clicking either of these buttons.

Users can approve or reject documents that are attached to the estimate by placing a checkmark next to the Status checkbox and clicking Approve Item(s) or Reject Item(s).

You can add additional documents to this assignment by clicking Add a Document. The Upload Document window appears.

Click the Browse button to select the file you’re uploading to the assignment. You can enter a description for the file, and select a date for the document. Click Yes to confirm that you want to upload this document.

You can upload the following document types: pdf, txt, doc, mht, msg, zip, and xls. In addition you can upload sound files (such as wav, mp3, wma) and image files (jpg, jpeg, gif, tif, tiff, bmp).

When an estimate was created in a version of Xactimate that allows separate labor efficiency setting by trade, a View Labor Efficiencies by Trade link appears above the document list. The labor efficiencies link displays each labor efficiency setting that was used (Factored In, Broken Out, or Not Applied).

When a valuation is uploaded with the estimate, a Valuation Report link appears above the document list. The Valuation Report link displays this valuation PDF report.
PHOTOS PAGE
Digital images, such as digital photographs, can also be attached to an estimate.

When you click on an image’s file name, a larger version of the image appears in your browser window.

Click the Next and Prev buttons to scroll through all the digital images attached to this assignment. You can also click Rotate to turn the image 90° counter-clockwise. You can also display annotations created in
Xactimate that have been uploaded with photos (you can choose to turn this functionality on or off; XactAnalysis remembers your specific annotation settings and applies them when you are logged in).

You can add additional images to this assignment by clicking Add a Photo. The Upload a New Image window appears.

Click the Browse button to select the image you’re uploading to the assignment. You can enter a description for the graphic, and select a date for the image (such as the date the image was photographed). Click Yes to confirm that you want to upload this document.

XactAnalysis informs you that the image was successfully uploaded. Click Close.
SKETCH PAGE
Images created in Xactimate’s Sketch module are attached to the estimate as PDFs and sent with the assignment and can be seen in the Sketch page.

Clicking on the file name brings up the Sketch image.

Note: You can right-click on the sketch to save a copy of it to your hard drive.
You can click to zoom in closer or to zoom out from the sketched image. You can also click to see the sketched image in 3D view.

You can turn and rotate your views of the sketched image by dragging with the cursor on the Sketch window. This process will differ slightly, depending on which viewer you use.

**Note:** You can see the sketched image in 3D view by using a VRML browser. Any browser that has a VRML 2.0 or better viewer should work with the 3D sketch. The viewer we recommend is from Parallelgraphics and can be downloaded from http://www.parallelgraphics.com/products/cortona/download/iexplore/ easily.
**Activity Log**

The *Activity Log* page displays the actions done to the assignment and tracks them by date.

Actions include photos, documents, notes, and action items.
**Referral Documents Page**

When an Xactimate user refers an assignment to a different user, XactAnalysis detects this and displays the *Referral Documents* page for the assignment.

When the assignment has been referred to a specific adjuster/contractor through the XactNet address, you can see the assignment changes (known as a "sub-assignment") by clicking the **View Referral** link on the *Referral Documents* page. When the assigned is referred to a new data set, the *Referral Documents* page appears, but there is no **View Referral** link.

This tab displays the documents associated with the referral, as well as the link to the full assignment detail.
**Previous Loss Page**

When a new assignment is sent, XactAnalysis compares the policy number of the claim with the same policy number of all previous claims. If there is a match, XactAnalysis sends the previous loss information with the assignment and this information is displayed in both Xactimate (version 27) and XactAnalysis.

A new Previous Loss tab appears to the right of the other estimate details if there is previous loss/claim history information available. This new tab displays the following:

- Policy #
- Claim #
- Type of Loss
- Date of Loss
- Estimate Amount (Gross Estimate Total)
- Deductible

When the you click the Previous Loss tab, XactAnalysis displays the claim number as an active link. Clicking the link takes you to that previous loss in XactAnalysis if you have rights to view it; if you do not have the necessary rights to view the previous loss (because it is in a data set or section of the hierarchy you do not have rights to), XactAnalysis displays a note indicating this fact.

You can contact your account representative to have this functionality configured for your company.
ISO CLAIMSEARCH® PAGE
Customers of both XactAnalysis and ClaimSearch® now have the ability to receive ClaimSearch information in XactAnalysis and Xactimate version 27. When XactAnalysis receives a new assignment, it sends a search request to ClaimSearch, and any matches can be displayed in XactAnalysis and Xactimate.

In XactAnalysis, the results are displayed as a report, which appears on a new Claim Search tab.
CANCELLING AN ASSIGNMENT

After reviewing the details of an assignment, you may decide to cancel that assignment.

Note: You can only cancel assignments that have not yet been marked completed and uploaded.

To cancel an assignment,

1. Click the Select an Action drop-down button and choose Cancel.

2. Click Go.

   The Cancel Assignment window appears.

3. Select the reason for cancelling the assignment, then enter any comments in the space provided.

4. Click Cancel Assignment to confirm the cancellation.

   XactAnalysis will send a cancellation notification to the contractor.

   Note: The canceled assignment will still appear in the Search Results list, and you will still be able to view Assignment Detail for it, but in both cases its status will be “Canceled.”
RESENDING AN ASSIGNMENT
You can resend an assignment if, for example, a contractor refuses an assignment, but then notifies you that they have chosen to take the assignment after all.

To resend an assignment,

1. Click the **Select an Action** drop-down button and choose **Resend**. Click **Go**.

The **Resend Assignment** window appears, confirming that you want to resend the assignment.

2. Click **Resend** to confirm that the assignment should be resent.

XactAnalysis will resend the assignment to the contractor.
**RESENDING MULTIPLE ASSIGNMENTS**

To resend multiple assignments,

1. From the Advanced Search Results page, place a checkmark next to each assignment you want to resend.

2. Click the drop-down button near the top of the page and choose **Resend**.

3. Click **Go**.
   XactAnalysis asks if you’re sure you want to resend the assignments.

4. Click **OK**.
   XactAnalysis informs you that the assignment was resent successfully.

5. Click **OK**.
REASSIGNING AN ASSIGNMENT
You can reassign any assignment to a different contractor (franchisee/adjuster), program location (claim unit/region, etc.), or data set.

To reassign an assignment,

1. Click the Select an Action drop-down button and choose Reassign. Click Go.

The Reassign window appears.

2. Click the Adjuster SmartList button to select a new adjuster to send the assignment to,
   or click the Program Location SmartList button to select a new program location,
   or click the Data Set SmartList button to select an adjuster from the specific data set you choose.

3. Click Reassign.

A window informs you that the assignment has been reassigned. When you return to the assignment's Details page, you will see the new assignee information and a status of Reassigned.
ASSIGNING A REVIEWER
XactAnalysis allows you to pre-assign a reviewer to an assignment before the assignment is flagged for review. This allows the assignment to have the reviewer already assigned when it is triggered into the Review Queue.

To pre-assign a reviewer,

1. From the Details page, click the Select an Action drop-down and select Assign Reviewer.
   The Select a Reviewer field appears.

2. Click the Select a Reviewer drop-down to choose a reviewer for this assignment if it requires review, then click Go.
   XactAnalysis informs you that the reviewer has been assigned.

3. Click Assign Reviewer.
   The reviewer will now be assigned this assignment if a review is necessary.

You can also pre-assign one or more assignments to a reviewer from the Advanced Search Results page by checkmarking the assignments, then following the steps above.

ASSIGNING A COLLABORATOR
XactAnalysis allows you to send a copy of an assignment to a collaborating adjuster without re-assigning it away from the original adjuster. This allows a claim rep to edit an estimate written by an independent adjuster who might have left the area, but doesn’t change the “ownership” of the estimate.

To assign a collaborator,

1. From the Details page, click the Assign Collaborator link under Workflow Status.

The Select a Collaborator window appears.
2. Click the **Claim Rep SmartList button** to choose a collaborator for this assignment, then click **Submit**.

3. Type a reason for the collaboration in the appropriate field.

4. Click **Submit**, then click **Close**.

   The *Details* window now displays date of the collaboration in progress.

**Assigning a Desk Adjuster**

A desk adjuster can be assigned to an assignment if you have the rights to add the adjuster. To do this,

1. From within an assignment, click the **Select an Action drop-down button** and select **Assign Desk Adjuster**.

2. Click **Go**.

   A search window appears.

3. Use the search window to find the desk adjuster you want to assign to this assignment.

   You can do this by searching for all desk adjusters whose names begin with a specific letter, or by entering part of the adjuster’s name and clicking **Submit**.

4. Click the desk adjuster’s name to add the adjuster to the assignment.

**Removing a Desk Adjuster**

A desk adjuster can be removed from an assignment.

1. From within an assignment, click the **Select an Action drop-down button** and select **Remove Desk Adjuster**.

2. Click **Go**.

   XactAnalysis removes the desk adjuster from the assignment.
**EDIT CAT CODES**

The CAT code on an assignment can be added or edited from within the assignment.

1. From within an assignment, click the **Select an Action drop-down button** and select **Edit CAT Code**.

2. Click the **Go** button.

   The *Edit CAT Code* window appears.

3. Type the new CAT code you want to use, then click **Save**.

   The new CAT code appears on the *Client/Policy* page of the assignment.

You can also edit the CAT codes for several assignments at once from the Advanced Search *Results* window.

From the Advanced Search *Results* window,

1. Place a checkmark next to each claim you want to edit CAT codes for.

2. Click the **Select an Action drop-down button**, then choose **Edit Cat Code**.

3. Click **Go**.

   The *Edit CAT Code* window appears.

4. Type the new CAT code you want to use, then click **Save**.

   The new CAT code appears on the *Client/Policy* pages of the claims you selected.
EMAILING AN ASSIGNMENT
To email an assignment to anyone with an email address,

1. Click the Select an Action drop-down button and choose Email Assignment.

   ![Email Assignment window]

2. Click Go.

   The Email Assignment window appears.

   ![Email Assignment window with options to select documents, photos, and sketches to attach to email]

You can send any portion of the assignment as an individual PDF or as a separate attachment to the email.
3. Place a checkmark next to the items you want to include with this assignment, then click **Attach to Email**. A window that looks very much like a standard email window appears.

![Email Attachment Window](image)

Click here to see your personal address book, where you can select addresses that you want to send this email to.

4. Enter the email address of the recipient in the **To** field.
   
   Include the email address of any others you want to see this email in the **CC** field.

5. Enter the subject of the message, then enter any additional message you’d like to send to the email recipient along with the assignment information.

6. Click **Send Email**, then click **OK**.
   
   XactAnalysis informs you that the assignment was sent correctly.

**VIEWING THE XACTANALYSIS ASSIGNMENT QUEUE™ FROM ADVANCED SEARCH**

If your company is set up for it, you can receive incomplete assignments in the XactAnalysis Assignment Queue™. This queue allows the assignment sender to route an assignment to your company without identifying the final recipient. (See “Sending an assignment to the XactAnalysis Assignment Queue” on page 139). From here, you can identify the assignment recipient and send the completed assignment.

To view the XactAnalysis Assignment Queue,

1. Click the **Advanced Search** option from the **Assignments** menu.
   
   The **Advanced Assignment Search** page appears.

2. In the XactAnalysis **Status** field, select **In Assign Queue**.
3. Define the span of time to be included by setting starting and ending dates using the drop-down list buttons in each field.

4. Click Submit.

The Search Results page appears, listing all assignments in the XactAnalysis Assignment Queue.

5. Click the link of the assignment you are viewing.

The Details page appears.
6. Click **Edit/Assign**, then click **Go** to complete the assignment and send it to a contractor. The assignment opens up in the **Assignment** window, almost ready to be sent.

7. Choose a qualified adjuster to send this job to in the **Adjuster** field (or the **Franchisee** field, or whatever field your company uses to indicate contractors).

   Click the **SmartList button** and select a contractor from the **Select an Adjuster** pop-up window.

8. Select the price list area you want to use.

   You can click the **SmartList button** and select a price list area from the **Select a Price List** pop-up window.

9. Click **Submit**.

   The assignment is sent to the selected adjuster.
SEND WORK ASSIGNMENT
Send Work Assignment lets you create new assignments and send them to adjusters electronically via XactAnalysis. These assignments can then be tracked and evaluated using the rest of the XactAnalysis tools.

You can also send the same assignment to multiple contractors. This capability is designed for a situation when multiple contractors are needed for a single claim.

Finally, test assignments can be sent to confirm that the system is functioning properly prior to sending real assignments.

Note: Many companies who use XactAnalysis have personalized the Assignments window to their own specifications. Your window may be different than what is described below.

CREATING AN ASSIGNMENT
To create an assignment,

1. Click Send Work Assignment from the Assignments menu.

   The Assignment page appears.

   ![Assignment page screenshot]

   To delete all previously entered information, click Clear at the bottom of the page.

2. If necessary, click the Data Set drop-down button to select the data set you are creating this assignment for.

   Most people will not need to choose this option.
3. Click in the **Policyholder Name** field under the *Property Owner/Risk Information* header and enter the name of the policyholder in the format: first, middle, last name.

4. Enter the insured’s address (street address, city, state or province, ZIP/postal code).
   
   It isn’t necessary to enter a hyphen if you use a nine-digit (“ZIP plus 4”) code; it will be added for you. If the code you enter does not contain exactly five or nine digits, an error message will advise you that you’re entering an invalid code format.

   **Note:** The Property ZIP/postal code is used to filter the available contractors.

5. Enter exactly ten digits (three for the area code plus seven for the phone number) in any phone field that applies, and an extension for the business phone (if needed).
   
   You don’t need to enter parentheses or a hyphen, XactAnalysis adds them automatically.

6. Mark the radio button next to the phone/pager method that represents the policyholder’s primary contact number.

7. Enter the insured email address.

8. Enter the name and phone number for any third-party claimant.

9. Enter the address for the risk property, if it is different from the policyholder’s address.

10. Enter the name and phone number for the person to contact to access the property.

11. Under the **Claim Information** section, enter information into the first few fields to describe the claim.
   
   Items marked with an asterisk (*) are required; all other fields are optional.

   **Note:** Many fields can be changed to be required by notifying your XactAnalysis account representative.

12. Click the **Program Location SmartList button** to select the program location where the insured’s property is located.

   **Note:** This field might be something other than “Program Location.” This is completely dependent on your company’s hierarchy.

   If the preferred program location is not the correct program location for this property, see “Assigning ZIP/postal codes to a program location” on page 55 to make sure the property’s ZIP/postal code is assigned to the correct program location.
13. Click the Contractor or Adjuster SmartList button to choose a qualified contractor/adjuster to send this job to.

If your company practices automatic rotation, XactAnalysis will display the next qualified contractor/adjuster for the job location, type, and size at the top of the list.

14. If necessary and desired, click the Desk Adjuster SmartList button to choose the desk adjuster you want to.

The desk adjuster tracks the assignment, but does not interfere with the assignment in any way.

*Note: When you have shared data sets, each company is allowed one desk adjuster.*

15. Look at the price list area and make sure it’s the one you want to use.

The default is selected based on the ZIP/postal code of the property.

If this is not the price list you want to use, select a different price list area by clicking the SmartList button and selecting a different price list area from the *Select a Price List* pop-up window.

16. Enter the time and date of loss and the time and date the assignment was received in the fields provided.

You can click the Calendar button to select the correct date. Click the drop-down buttons to select AM/PM and time zone.

17. Enter any special instructions for this assignment in the Description of Loss and/or Instructions field.

If you’re sending a test assignment, you don’t need to enter anything in this field. The text “THIS IS A TEST ASSIGNMENT” will be inserted in the first line automatically when you select the Test checkbox.

For additional information on test assignments, see “Sending a test assignment” on page 137.

18. Add any attachments.

To add an attachment,

a. Click the Add button.

Attachments must be under 5 MB and can be of the following document types: pdf, txt, doc, mht, msg, zip, and xls. In addition you can upload sound files (such as wav, mp3, wma) and image files (jpg, jpeg, gif, tiff, tiff, bmp).

b. Click the Browse button to select the actual file, or type the filename and data path directly into the File Name field.

c. Type a description for the file.

d. Click Upload.

e. When XactAnalysis informs you the attachment was uploaded successfully, click Close.
19. Indicate with a checkmark if there is any likelihood of a subrogation issue on this claim, then enter the explanation in the field below.

20. Enter the name, address, email, and phone number of the client for this assignment.
   The client and the property owner are not always the same.

21. Enter the policy type and number.

22. Enter the inception, effective, and expiration dates for this policy.

23. Click **Across All Coverages** or **Coverage Specific** to determine if you want to track coverages together or individually.

24. Enter the coverage (jewelry, furs, firearms, etc.), as well as the coverage’s type, policy limit, and deductible.

25. Click **Yes** or **No** to whether or not you want to apply limits.

26. Click the **Apply To** drop-down button to choose replacement costs (R/C), actual cash value (ACV), or both.
27. Enter the amounts of the ITV and reserve.

28. If you are entering specific coverages individually, click the **Add Coverage** link and repeat steps 23–28 for each coverage.

29. Enter any applicable amounts into the *Loss of Use* fields (*Amount* and *Reserve*).

30. Enter the name of the mortgage holder, if there is any.

31. Mark either of the last two checkboxes if this assignment needs special attention, or if it’s a test assignment.
32. Click **Submit**.

XactAnalysis displays a copy of your assignment for final review.

Verify this information. If you need to make a change before sending, click **Back** (at the bottom of the window) to return to the Assignment page, make the change(s) and click **Send Assignment**.

When all the data is correct, click **Send Assignment** (at the bottom of the window). The assignment is transmitted and the message “Assignment Sent Successfully” appears.

You can now choose to view the results of this assignment, go to **Advanced Search**, send this assignment again as a multiple assignment, or send a new assignment.
SENDING MULTIPLE ASSIGNMENTS
The Send Multiple Assignments option is used when multiple assignments will be sent to different contractors for the same claim. For example, you might have a claim where you want the first contractor to perform necessary emergency services that must be done immediately, i.e. temporary patches to holes in the walls or ceiling to keep the weather out. The second contractor—the general contractor—can then perform the balance of the required repairs.

1. Send the assignment to the first contractor as described in steps 2–32, previous. The following appears:

   Assignment Sent Successfully!
   
   Go Directly To This Assignment
   Go To Advanced Search
   Send Multiple Assignments
   Send New Assignment  for  Safe Haven - Staff

2. Click Send Multiple Assignments.
   XactAnalysis returns you to the Assignment page, with the information from the assignment still in place.

3. Make whatever changes you need before sending the assignment to a different contractor/adjuster.

4. When you’re done with any changes and have selected a new contractor, click Submit and a copy of the assignment is again displayed on-screen for final review.

   Verify the information. As previously, if you need to make a change before sending, click Back to return to the Assignment page, make the change(s) and click Submit.

5. When all the data is correct, click Send Assignment. The second copy of this assignment is transmitted and the message “Assignment Sent Successfully” appears.

SENDING A TEST ASSIGNMENT
Before you begin sending assignments to a contractor who’s new to XactAnalysis, you may want to do a “trial run” to make sure that the contractor is properly set up to receive your assignments. To verify this before you start sending actual assignments, you can send a test assignment.

Note: The main distinguishing characteristics of a test assignment is that it is specifically excluded from XactAnalysis reports (to avoid artificially skewing those results) and includes special test text in the Instructions field. A test assignment is processed just like a normal assignment in all other ways to provide a meaningful test. The test assignment will appear in the Advanced Search, but will be clearly identified as a test assignment.

1. Follow the steps in “Creating an assignment” on page 131.

2. Click the Test checkbox located next to the Instructions field.
3. Click the **Submit** button.

Just as occurs with the normal assignment procedure, a copy of your assignment appears onscreen for final review. Verify the information. If you need to make a change before sending, click **Back** to return to the Assignments page, make the change(s) and click **Submit** again.

Note that the area reserved for instructions now contains the text: “THIS IS A TEST ASSIGNMENT.”

4. When all the data is correct, click **Send Assignment**. The assignment is transmitted and the message “Test Assignment Sent Successfully” appears.
Click the **Send New Assignment** button to create and transmit another assignment.

For details on sending your test assignment again as a multiple assignment, see “Sending multiple assignments” on page 137.

**Note:** To make sure the contractor in question is properly set up to send as well as receive, have them complete the test cycle by creating a test estimate (based on your test assignment) and send it back to you.

**SENDING AN ASSIGNMENT TO THE XactAnalysis ASSIGNMENT QUEUE**

If your company is set up for it, you can send an assignment to the XactAnalysis Assignment Queue, where it will be processed by a proxy company.

To send an assignment to the XactAnalysis Assignment Queue, follow the steps in “Creating an assignment” except leave the Adjuster (or Franchisee or Contractor) field blank. This means you would skip step 13.

When you click **Submit**, XactAnalysis sends the unfinished assignment to the XactAnalysis Assignment Queue, where the proxy company can assign a contractor and send it on (see “Viewing the XactAnalysis Assignment Queue™ from Advanced Search” on page 128).

**Note:** If your company hasn’t been set up to use the XactAnalysis Assignment Queue, you will not be allowed to send the assignment without assigning it a contractor.
**ESTIMATE REVIEW QUEUE**

The Estimate Review Queue is a module that places all designated assignments returned from your adjusters into a list for a desk review. The administrator assigns specific estimates to individual reviewers for approval. If the queue is turned on, the Assignment Detail window lets users know the current status (i.e. Estimate Not Reviewed, Estimate Review Complete) of the assignment.

To see this module, click **Estimate Review Queue** from the **Assignments** menu.

*Note: If you don’t see Estimate Review Queue in your main menu, see your XactAnalysis Administrator to have it turned on.*

---

If you have supervisor rights to this module, you will see all assignments, regardless of the reviewer. If you only have reviewer rights, you will only see the assignments that have been assigned to you.

**SETTING UP REVIEW QUEUE RULES**

A Review Queue administrator can create specific Estimate Review Queue rules that determine which of the claims you receive from contractors or independent adjusters need to be reviewed.

For example, you can create a complex rule that flags XactAnalysis when it receives a water-loss estimate greater than $25,000 from Houston that contains premium grade items. You could also create a simple rule that allows you to review 1 out of every 4 assignments that your adjusters are estimating, or any assignment that doesn’t contain O&P.

To create a rule,

1. From the Estimate Review Queue, click the **Review Queue Rules** link.

   The Review Queue Rules page displays the various rules that have already been created for your data sets.

2. Click the **Add New Rule** button at the top of the page.

   The Create New Rule window appears.

   *Note: If you don’t see the Add New Rule button, you must be set up as an Estimate Review Administrator from the User Administration module.*
3. If necessary, select the data set you want to create a rule for.

   Note: For the rest of this window, every field you fill out is optional. You only need to fill in the fields that you want to use as criteria for your Estimate Review Queue rule.

![Estimate Review Queue window](image)

4. Select the hierarchy type, then select the individual, organization, or geographical locations you want to review assignments for.

5. Enter information for one or more of the following fields if you want to review estimates that fit their criteria: desk adjuster, CAT code, claim number, state, type of loss, and postal code.
6. Enter a date range or select a time period you want included in your rule.

7. Enter the frequency you would like XactAnalysis to review random assignments for each adjuster/contractor.

8. Select the number of estimates you want this rule to review.

9. Select the XactAnalysis status you’d like XactAnalysis to review.

10. Enter the dollar-value range for the estimates you’d like reviewed for this rule.

11. Select the job type your rule is for, and enter a dollar-value range. Repeat for every job type you want to include in the rule.

12. Choose whether or not you want O&P to be used as a factor to be included in this rule.

13. Enter number of trades above which or below which you want included in the rule.

14. Click the Selected Trades SmartList button to select the trades you want the rule applied to.

15. Place a checkmark next to the category/selector codes you want reviewed.

16. Place a checkmark next to any additional parameters you want XactAnalysis to check for.

17. Select a priority you want to assign this rule.

18. Select a reviewer you want to assign this rule to.

19. Click to apply this rule to existing estimates or only future estimates. Place a checkmark to include test estimates in this rule.

20. Click OK.

The rule is added to the Estimate Review Queue Rules list.

You can add as many rules as necessary to fit your company’s needs.
FILTERING THE QUEUE
You can filter the estimating queue to view only assignments from a specific insurer, recipient, or reviewer. You can also filter the queue by assignment status or date.

To filter the queue,

1. Click **Queue Filter** near the top of the Estimate Reviewer Queue window.

   The **Estimate Review Queue Filter** window appears.

   ![Estimate Review Queue Filter Window](image)

   *Note: Your company’s Filter window may differ slightly in the options it offers, but the basic instructions are the same.*

2. Fill in any of the search criteria you want to use to filter the assignments by.

   This includes data set, insured name, claim number, recipient, job type, policy type, type of loss, cat code, state, audit violation, reviewer, and status.

   You can select multiple violations one of the following ways:

   - Select consecutive violations by clicking on the first violation and dragging the cursor to the last one.
   - Select non-consecutive violations by clicking a violation, holding the CTRL key, then clicking additional violations.

   *Note: The more filters you use, the smaller the list of assignments that fit the criteria will be. Use more filters only if you want a very exact assignment list.*

3. If you want to filter the assignments by date, choose whether you want to filter the assignments by the date the assignment was Uploaded, Assigned, Accepted, Entered Queue, or Completed.

4. Select the dates you are viewing assignments for in the **From** and **To** fields.
5. Click to view test assignments, normal assignments, or both.

6. Enter the number of rows you want to appear on each page of the queue.

7. Click **Submit**.

   The *Estimate Review Queue* window displays only the assignments that fit the criteria you’ve selected in the *Filter* window.

**Assigning a Reviewer to an Assignment**

To assign a reviewer to an assignment, place a checkmark next to the assignment. Click the **Select an Action drop-down button** and choose **Assign**. Select the reviewer you’re assigning to this assignment from the drop-down list, then click **Go**.

![Assign reviewer](image)

The selected reviewer now appears in the *Reviewer* column for that assignment.

You can re-assign an assignment to a different reviewer by repeating this process with a different reviewer.

If you want to re-assign a closed (completed) assignment to another reviewer, filter the queue to include closed assignments, then re-assign the closed assignment to the other reviewer. This opens the assignment and re-assigns it to the new reviewer.

**Removing an Assignment**

To remove an assignment from the queue without having to mark them *Reviewed* or *Reviewed w/Exceptions*, place a checkmark next to the assignment. Click the **Select an Action drop-down button** and choose **Remove from Review Queue**, then click **Go**.

*Note:* You can contact your Xactware national sales account representative if you would like this preference turned off for your company.
**VIEWING AN ASSIGNMENT**

To view an assignment, click on the claim number for the assignment. The *Assignment Detail* window appears.

![Assignment Detail Window](image)

**Assignee Information**
- **CAF**
- **13 E Center St, Fayetteville, AR 72701**
- **Office**: (479) 556-9821
- **Email**: eakilling@construct.com
- **Adjuster Address**: SH.FAYETTEVILLE.AR

| Project Manager: |  |
|------------------|--
|  |

**XactAnalysis Profile**
- **Carrier**

| Office Levels: |  |
|----------------|--
| Region: Southern Plains |  |
| Program Level: Fayetteville Area |  |

| Organization Levels: |  |
|----------------------|--
|  |

**Estimate Review Queue**

<table>
<thead>
<tr>
<th>View Assignment:</th>
<th>Claim #: 123456323</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal ID:</td>
<td>CAF</td>
</tr>
<tr>
<td>Assigned to:</td>
<td>Returned</td>
</tr>
<tr>
<td>Status:</td>
<td>Safe Haven - Staff</td>
</tr>
<tr>
<td>Created by Team:</td>
<td>Elliot Smith</td>
</tr>
</tbody>
</table>

**Estimate Total:** $9,822.57

| Select an Action | 60 |

**XactAnalysis Status**

<table>
<thead>
<tr>
<th>Assignment Received:</th>
<th>11-May-2010 10:29:40 AM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjuster Notified:</td>
<td></td>
</tr>
<tr>
<td>Assignment Delivered:</td>
<td>11-May-2010 10:29:55 AM</td>
</tr>
<tr>
<td>Estimate Returned to XactAnalysis:</td>
<td>$9,822.57</td>
</tr>
<tr>
<td>Correction Returned to XactAnalysis:</td>
<td>$9,822.57</td>
</tr>
<tr>
<td>Cancellation Received:</td>
<td></td>
</tr>
<tr>
<td>Adjuster Notified of Cancellation:</td>
<td></td>
</tr>
<tr>
<td>Assignment Rejected:</td>
<td></td>
</tr>
</tbody>
</table>

**Workflow Status**

| Customer Contacted: | 11-May-2010 |
| Site Inspected:     | 11-May-2010 |
| Target Start Date:  |             |
| Target Completion Date: |             |
| Safe Haven - Staff Reviewer: | Not Yet Reviewed 11-May-2010 10:31:10 AM |
| Job Started:        |             |
| Job Completed:      |             |
| Job Not Sold:       |             |
| Paid Status:        |             |
| Paid:               |             |
| Client Billed:      | Billing Pending |
| Payment Received:   |             |
| File Status:        |             |
| XactCentral File Status: | In-Progress |
| Collaboration Status: |             |
| Attention Status:   | Attention not needed |
| Onsite Reinspection Status: |             |

**Approval Status**

| QA Approval: | Not Yet App |
| Client Approval: | Not Yet App |

*All times are Mountain Time*
REVIEWING AN ASSIGNMENT

To review an assignment, you must first accept the assignment. Click the Select an Action drop-down, then choose Accept Estimate Review and click Go. The Update Status to Review Accepted window appears.

Fill in any necessary fields and click Update Status to finish accepting the assignment.

You can see that the Review Completed line is now Complete Review.
To review the assignment, you can look over the reports in the *Documents* page, and any photos and Sketches that accompany the assignment, then compare them to the actual estimate. After the assignment has been reviewed, click **Complete Review** next to **Review Completed**.

You can mark the review as complete ("Estimate Reviewed"), or you can indicate that you have some reservations about something within the review process ("Estimate Reviewed with Exceptions").

Click **Update Status** to finish. The **Review Completed** line in the Details page changes to include the date.

**MULTIPLE REVIEW QUEUES**
Companies that share the same data sets can each use their own Estimate Review Queue on assignments. This is especially helpful to carriers working with independent adjusting companies. After the Multiple Review Queue option has been turned on for a data set, estimates uploaded in that data set will show up in the independent adjusting firm’s queue first. Once it is marked reviewed with no exceptions by the adjusting Company, it will show up in the insurance carrier review queue.

You can contact your account representative to have this functionality turned on for your company.
XactAnalysis Assignment Queue

The XactAnalysis Assignment Queue contains a list of assignments that are not currently assigned to a recipient. This queue allows the assignment sender to route an assignment to your company without identifying the final recipient.

These assignments can be viewed either from the Advanced Search window or through the Assignment Queue mapping modules.

Note: See also “Viewing the XactAnalysis Assignment Queue™ from Advanced Search” on page 128 and “XactAnalysis Assignment Queue by ZIP” on page 152.

The XactAnalysis Assignment Queue mapping module displays a report that geographically maps out the location of all selected assignments in the queue and lets you assign them out to contractors/adjusters.

You can filter the assignments you view from the XactAnalysis Assignment Queue by data set, type of loss, postal code, job type, or CAT/non-CAT. You can also choose to view a small, large, or extra large map with or without plot points in the U.S. or Canada.

Note: Not all users will see the same filter options.
To view the XactAnalysis Assignment Queue,

1. Choose **XactAnalysis Assignment Queue** from the **Assignments** menu.

   The **XactAnalysis Assignment Queue** window appears, showing a map of the United States, delineated by state.

   ![XactAnalysis Assignment Queue Window](image)

   XactAnalysis displays the full number of assignments in the queue for the region selected (in this case, the entire United States).

2. If there is a specific data set, type of loss, etc. that you would like to view the XactAnalysis Assignment Queue for, select those filters near the top of the page and click the **Filter** button.

3. Click the area on the map where you want to drill-down to see close-up.

   Each time you click, you can see more detail in a smaller area of the map.
4. Continue clicking until you reach the Region level of the map. 

XactAnalysis displays a chart with the total number of In-progress assignments in the area.

All contractors/adjusters with assignments in progress are displayed here. Click the contractor’s link to see a list of all assignments currently in progress (whether or not the assignment is in the Assignments Queue).
5. Continue drilling down to the individual assignment(s) you want to view. You can drill down as far as a street level.

6. Click on the link near the top that displays the number of assignments in the map area. From here you can view the claim as you would any other (see "Advanced Search" on page 102).
**XactAnalysis Assignment Queue by ZIP**

The XactAnalysis Assignment Queue by ZIP option contains a list of assignments that are not currently assigned to a recipient. This queue allows the assignment sender to route an assignment to your company without identifying the final recipient.

XactAnalysis Assignment Queue by ZIP displays the map of assignments in a slightly different format than the XactAnalysis Assignment Queue.

**Note:** See also “Viewing the XactAnalysis Assignment Queue™ from Advanced Search” on page 128 and “XactAnalysis Assignment Queue” on page 148.

**Note:** Not all users will see the same filter options.

To view the XactAnalysis Assignment Queue by ZIP,

1. Choose XactAnalysis Assignment Queue by ZIP from the Assignments menu.

   The XactAnalysis Assignment Queue by ZIP window appears, showing a map of the United States, delineated by state.

   XactAnalysis displays the full number of assignments in the queue for the region selected (in this case, the entire United States).

   **Note:** You can talk to your XactAnalysis account representative to set up Assignment Queue by ZIP to always display a specific state/province upon opening.
2. If there is a specific sender/carrier, client, type of loss, etc. that you would like to view the XactAnalysis Assignment Queue for, select those filters near the top of the page and click the **Filter** button.

3. Click on a state to drill down to view the XactAnalysis Assignment Queue by county.
4. Click on a county to drill down to view XactAnalysis Assignment Queue by ZIP code.

5. Click on a ZIP code to view a list of assignments currently in XactAnalysis Assignment Queue.

From here you can view and modify the assignment as you would any assignment (see “Advanced Search” on page 102).
Chapter 4
Reports

XactAnalysis offers leading edge management tools that harness the power of XactAnalysis’ communications extranet to help you stay on top of your assignments and estimates. With XactAnalysis’ reports, you can determine how many assignments have been sent to a particular contractor, analyze the relative turn-around time for one or more geographic regions and identify region, program area, or office bottlenecks in your organization’s workflow. You can also make industry and trade comparisons with some of the management and industry trend reports.

XactAnalysis users can access the following sections:

▲ Management/Activity Reports
▲ Real-Time Management Dashboard
▲ Industry Trend Reports
▲ Assignment Volume
**MANAGEMENT/ACTIVITY REPORTS**

The XactAnalysis management and activity reports present data that is specific to your company and your company’s assignments and employees. You can view these reports for the entire company, or filter out unnecessary data so that you can concentrate on the areas that require your attention.

XactAnalysis gives you five different types of reports to choose from: text reports, graphical reports, trend reports, and activity reports.

- **Text Reports** display tables that describe various aspects of estimates that have been completed by your company.
- **Graphical Reports** are similar to text reports, but include a 3D-bar graph representation of the data shown in the table.
- **Trend Reports** display information pertaining to claims from your specific company that are returned to and stored in XactAnalysis. In addition, management trend reports may compare claim data from your company to claim data from other companies within the restoration industry. This data is plotted chronologically on a line chart.
- **Activity Reports** show the status and progress of your company’s assignments, and the people working on those assignments.
- **Excel Reports** display the report on a Microsoft Excel spreadsheet.
To set filters for generating activity or management reports,

1. Choose **Management/Activity Reports** from the **Reports** menu.
   
   **Note:** If you don’t see this link on the Reports menu, you can be set up to view these reports from User’s Info in the User Administration module (see “Editing a user” on page 23.)

The Management/Activity Reports filter appears.

You’ll need to fill out the information in each section, starting with the **Report Criteria** section.

**Note:** The Report Criteria section that you see may be different than what appears here, depending on your profile. The way each field works is basically the same, however. The Report Criteria section defines the hierarchy that will appear in the report. (See “Viewing graphical reports” on page 162 for more information on hierarchies.)

2. Click the **Report drop-down button** to select the report you want to view.

   ![Report Selection](image)

   - Click the Detailed Report Description link to see a description of the selected report.

   You can choose from a variety of graphical, trend, text, and activity reports.
3. Select the **Geographic**, **Organizational**, or **Individual** radio button, depending on whether you want to view reports for a geographical area, an organizational team, or for an individual.

You will see the **Organizational** radio button only if your company is set up with an organizational hierarchy (see “Organization Hierarchy” on page 59).

4. Click the **SmartList button** and drill down, if necessary, to select the individual/location(s) you want to view a report for.

![Area Radio Buttons](Click here to choose the individual/locations to view a report for.)

You can select more than one location from your geographic and organizational hierarchies.

5. Select any of three sets of series you want to include in this report.

A series is a combination of data sets and trades. The data sets and trades you’ll have available depend upon the carrier and your rights.

a. Select the data set in the first series from the **Data Set** drop-down list.

![Data Set Table](Some of the data sets you might have to choose from are Staff, Direct Repair Program (DRP), Independent adjusters, etc. You can also choose Industry, which allows you to view industry data.)

b. Click the first **Trade drop-down button** to select the trade you want to view report information for.

The trades you can choose from are Drywall, Finish Carpentry, Flooring, General, HVAC, Mitigation, Painting, Roofing, Rough Framing, or Siding/Gutters. You can select “All” if you want to include data for all trades.

You must enter at least one series to report on (or keep the default All/All). You can enter additional sets of series in the Series 2 and Series 3 rows.

Many users include an industry series in addition to series’ for their own data sets. This allows you to compare your own information against industry standards.

6. Place a checkmark next to the industry types you want to compare with your company.

Rankings appear on the existing reports when a data series is compared against the “Industry Data without [carrier name here]” data series. The comparisons being made are against the entire list of insurance carriers without regard to asset size, PIF, or assignment volume.

**Note:** You can only select these if you selected **Industry** as one of your data sets.
7. Under *Report Filters*, click the appropriate checkboxes to indicate which loss sizes you want reported.

![Report Filters Image]

You might want to exclude large losses in cases where a single large loss might skew your averages.

8. Place a checkmark in the appropriate box to choose whether you want a report on CAT data, non-CAT data, or both.

![Non-CAT Data and CAT Data Image]

At least one checkbox must have a checkmark in it. If you choose to only view CAT data, you will also have the option to select one or more CAT codes to view the report for.

9. Place a checkmark in the appropriate boxes to choose residential, commercial, zero-dollar estimates, and business days.

10. In the bottom portion of the filter, you have one of two options:

- Enter a new date range to create a new time period for the report you want to view (skip to step 13).
- Select a pre-created report from the *Report Library* (continue with step 11).

11. If you choose to view a pre-created report, click the *Report Library SmartList button*.

The *Report Library* appears.

![Report Library Image]

Depending on the previous usage of this report, you might see a number of reports that have already been run.

12. Click the report you want to view, then skip to step 14.
13. If you want to create a new report, choose a date range from the Start Date and End Date calendar buttons, beginning with the Start Date.

A SmartCalendar appears.

You can select any date to indicate the beginning and ending dates for the range you want to view data for.

*Note:* You can select a specific month and year from the drop-down buttons.

14. If you have not defined personal rules, you can click the Define Personal Rules link to go to the Personal Rules page (page 87), which allows you to set up conditional flags for information you’re specifically watching for in a report.

15. Click Continue.

If you are viewing a report from the Report Library, the report appears in your web browser immediately. If you have entered a date range for a new report, the Confirm Report Selections window appears.
16. Make sure the correct email address is in the appropriate field, then click **Submit**.

XactAnalysis Reports sends you an e-mail letting you know when the report has been generated. The e-mail also contains a link to the URL where you can find the report.

If you do not enter a valid email address, the report will still be generated, but you will not be notified. You can find the report in the Report Library.

17. Click the delivered URL to see the report.

If you are not already logged into XactAnalysis, you will be prompted to enter your user ID and password.

For samples of available management reports, see Appendix A, “Management/Activity Reports.”
VIEWING GRAPHICAL REPORTS

In the top of your reports appears your report header, which displays your report selections.

<table>
<thead>
<tr>
<th>ESTIMATE TAX USAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff: All Trades</td>
</tr>
<tr>
<td>CAT and Non-CAT Data</td>
</tr>
<tr>
<td>01-Jan-2010 to 31-May-2010</td>
</tr>
<tr>
<td>Both Residential &amp; Commercial Shown</td>
</tr>
<tr>
<td>All Value Ranges Shown</td>
</tr>
<tr>
<td>All Coverage Types Shown</td>
</tr>
<tr>
<td>Zero Dollar Estimates Included</td>
</tr>
<tr>
<td>Company Wide</td>
</tr>
</tbody>
</table>

To the left of the report appears a tree-type structure representing the carrier’s hierarchy (dependant upon your security rights and the level the report was run for). You can expand the tree to view and select additional levels by clicking on the plus sign next to the level you want expanded.

- Safe Haven
  - Rocky Mountain
  - Orem Area
  - Southwest
  - UT_Cedar City Area

To the right you will see a bar graph. Below the bar graph appears the summary table, which displays the information appearing in the bar chart plus additional relevant information.
In addition to the percentages displayed on the bar chart, you can place your cursor over one of the bars to see the actual number or dollar value the bar represents.

*Note:* This feature does not give actual counts or dollar values for industry bars.
DRILLING DOWN ON GRAPHICAL REPORTS
Once the hierarchy tree is expanded, clicking on the minus sign collapses the tree. If you run a report with one series with a contractors data set and one series with a claim reps data set, then both contractors and claim reps will be listed in the hierarchy tree at the appropriate level.

When you click on a specific level (not the plus or minus sign but the label itself), the graph(s) changes to represent data for that specific level only; i.e. all categories appear on the graph(s) but only for the level of hierarchy selected. The level selected appears blue in the hierarchy tree.

For example, in the graphic below, the Estimate Type of Loss Report was run, company-wide, for Safe Haven. Then the region West in the hierarchy tree was selected. These particular graphs display all types of loss for the Salt Lake City program location.
It is also possible to drill-down on a specific category by clicking on a bar in the graph. XactAnalysis displays that category information for the next level of hierarchy.

For example, in the graphic below, the *Estimate Type of Loss Report* was run, company-wide, for Safe Haven and the Hail bar was clicked. The graphs that appear show the Hail loss for each region.

You can continue to drill-down to the next level of hierarchy by clicking on another bar. For example, if you click Atlantic in the graphic above, the graphs would display all program locations in the Atlantic region with Hail losses.

Once you have drilled down to the estimate level, clicking on an estimate name displays a page where you can select to view print images, digital images, or sketch images (if allowed by the carrier). If multiple data sets have been selected and have data at the estimate level, then the tables for each data set will be listed one above the other, not side by side.

In addition to drilling down on the hierarchy tree and graph bars, you can drill-down on the labels in the first column of the summary table (located below the graph). This works the same as drilling down on bar in the graph.
VIEWING TREND REPORTS
The graphs used in the trend reports are time plots. In the time plots, the data is grouped by month and can display up to 13 months at a time. Trend reports allow you to see what is happening with your data over time. These reports also show a summary table after the time plots.

DRILLING DOWN ON TREND REPORTS
In trend reports, it is possible to drill-down on the hierarchy tree and on the time plots. When a specific hierarchy level in the tree is drilled on, the time plots display information just for that hierarchy level. However, when one of the months in the time plots is drilled on, bar charts appear. Each bar chart shows the variable of interest on the y-axis (i.e. number of estimates, total estimate value, average estimate value, etc.) but will show the next level down of the hierarchy. Therefore, if you are viewing an Average Estimate Value time plot at the company-wide level and drill-down on April 2010, the report will display a bar chart that has the average estimate value by region for the month of April 2010 (if comparing two data sets, a bar for each data set would appear for each region).

As with Graphical reports, you can drill-down on the labels in the first column of the summary table (located below the graph). This works the same as drilling down on the time plots.
**VIEWING TEXT AND ACTIVITY REPORTS**

The Text and Activity reports have the same type of report header and hierarchy tree as the Graphical reports. They don't have any graphs, but they do contain a summary table that presents you with the information you need.

**DRILLING DOWN ON TEXT/ACTIVITY REPORTS**

This works the same as drilling down on a bar in a graphical report. In most of the Text reports, drilling down on the first column of the summary table is the same as drilling in the hierarchy tree.

For example, in the graphic below, drilling down to the Washington offices in the Northwest region in the hierarchy tree or in the summary table displays the program locations located in the Washington office.

<table>
<thead>
<tr>
<th>Program Location</th>
<th>Total Estimates</th>
<th>Average Estimate Value</th>
<th>Total Estimate Value</th>
<th>% of Total Estimates</th>
<th>% of Total Estimate Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seattle, WA</td>
<td>7</td>
<td>$19,786</td>
<td>$63,534</td>
<td>63.6%</td>
<td>58.1%</td>
</tr>
<tr>
<td>Spokane, WA</td>
<td>2</td>
<td>$1,734</td>
<td>$3,469</td>
<td>18.2%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Vancouver, WA</td>
<td>1</td>
<td>$40,256</td>
<td>$40,256</td>
<td>9.1%</td>
<td>30.0%</td>
</tr>
<tr>
<td>Yakima, WA</td>
<td>1</td>
<td>$2,140</td>
<td>$2,140</td>
<td>9.1%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Washington</td>
<td>11</td>
<td>$9,945</td>
<td>$109,400</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

**NOTE:** U.S. estimates are in U.S. Dollars, Canadian estimates are in Canadian Dollars.

In a few reports (Estimate Type of Loss and Loss Value Range, for example), clicking on the first column of the summary table is similar to drilling down on a category bar in a graphical report: drilling down on a category in the first column displays the next level down of hierarchy for that specific category. If allowed by the carrier, it is possible to drill down to the estimate level and view print images, digital images, and sketch images.

You can use the hierarchy tree to drill-down on Activity reports.

For samples of available Management and Activity reports, see Appendix A, “Management/Activity Reports.”
REAL-TIME MANAGEMENT DASHBOARD
The Real-Time Management Dashboard is a set of reports, geared for managers, that shows high-level detail on what’s going on in your company. The five reports are Claim Trends, Activity/Volume, Audits, Performance, and Usage.

To view the real-time management dashboard reports, choose Real-Time Management Dashboard from the Reports menu.

CLAIM TRENDS
The Claim Trends is the default report that you’ll see when you view the Real-Time Management Dashboard reports. It displays a graph of the United States that displays different colors for average claim values for the associated areas (states or counties), and allows you to select various filters to refine the data.

To view the Claim Trends reports,

1. Choose Real-Time Management Dashboard from the Reports menu.

The Real-Time Management Dashboard reports appear with the Claim Trends report displayed.
2. Set any filters you’d like to use to view fewer claim results, then click **Submit**.

You can filter by client group, area, date range, CAT or non-CAT, type of loss, or ZIP/postal code. You can filter by more than one of these categories to define your report very specifically.

XactAnalysis will display the filtered map.

You may notice that when you hold your cursor over a state, a pop-up appears, telling you the number of claims in this state and the average cost of each claim.
3. If you’d like to further drill-down, click a state where you’d like to see the breakdown for counties. A map of the state appears, delineated by county.

4. Click a county where you’d like where you’d like to see a breakdown by ZIP Code.
5. Click a ZIP code you’d like to view claims for.

XactAnalysis displays the claims that were filed in this county.

<table>
<thead>
<tr>
<th>Filters Used</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Company: Safe Haven</td>
<td>Zip Code: 84601</td>
</tr>
<tr>
<td>State/Province: UT</td>
<td>Normal Test: Normal</td>
</tr>
</tbody>
</table>

**Real-Time Management Dashboard**

5. Click a ZIP code you’d like to view claims for.

XactAnalysis displays the claims that were filed in this county.

![XactAnalysis > Assignment Overview > Results](image)

<table>
<thead>
<tr>
<th>6 Assignments found</th>
<th>Select All</th>
<th>Clear All</th>
<th>Select an Action</th>
<th>Show Max 1000</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 366-30784</td>
<td>$1,346.80</td>
<td>WATER</td>
<td>Barney Bold</td>
<td>84601-1681</td>
</tr>
<tr>
<td>2 367-30372</td>
<td>$4,079.67</td>
<td>OTHER</td>
<td>Chris Olsen</td>
<td>84601-2684</td>
</tr>
<tr>
<td>3 367-58391</td>
<td>$3,234.27</td>
<td>FREEZE</td>
<td>Fred Henderson</td>
<td>84601-1146</td>
</tr>
<tr>
<td>4 367-49356</td>
<td>$11,444.56</td>
<td>WATER</td>
<td>Margaret Brown</td>
<td>84601-2204</td>
</tr>
<tr>
<td>5 365-30714</td>
<td>$2,000.00</td>
<td>NOT COL</td>
<td>Todd Walker</td>
<td>84601-2200</td>
</tr>
</tbody>
</table>

* Audit flags exist for this assignment

6. From here, you can click on the claim number of any claim to see its assignment details (see "Details page" on page 105).
**ACTIVITY/VOLUME**

The Activity/Volume reports display a graph that shows you the company's response time compared to the industry, and the average response times for assignments contacted, inspected, and returned. These times are calculated the same way that they are in the Response Time management report (page 261). The same graph will show these same statuses as compared to the industry averages.

The *Average Response Times* section displays the average time your company has taken to respond to an XactAnalysis assignment; from the time you are notified until you download the assignment, and the time from download until it’s returned to XactAnalysis. This average is calculated from assignments sent to your company during the date range selected.

To view the Activity/Volume report,

1. Choose **Real-Time Management Dashboard** from the Reports menu.
2. Click the **Activity/Volume** tab.

The *Activity/Volume reports* page appears.
3. Set any filters you’d like to use to view fewer claim results, then click **Submit**.

You can filter by client group, area, date range, and CAT or non-CAT. You can filter by more than one of these categories to define your report very specifically.

XactAnalysis will display the filtered map.

You may notice that when you hold your cursor part of the graph, a pop-up appears, displaying the exact response time.
4. Click a set of graphs to further drill-down your location.

You can drill down to the carrier/adjuster level.
AUDITS
The Audit reports are divided into two sections: the Audit Summary, and the Audit Results by Area. The Audit Summary is a table that displays estimate totals for the area selected. This table consists of the following:

- **Est. Value**: Total gross estimate value for all returned estimates for the selected area.
- **Est. Value w/Results**: Total gross estimate value for all returned estimates w/ results for the selected area.
- **Audit Results**: Total audit results for all returned estimates for the selected area.
- **Avg. Results**: Total audit results divided by the number of estimates with results for the selected area.

The Audit Results by Area is a graph displaying the level of the hierarchy below the geographical level selected. The graph shows separate totals for each of the nine selections on the right side of the graph.

To view the Audit report,

1. Choose **Real-Time Management Dashboard** from the **Reports** menu.
2. Click the **Audit** tab.

The Audit Reports page appears, displaying the number of claims for each region in the entire company.
3. Set any filters you’d like to use to view fewer claim results, then click **Submit**.

You can filter by client group, area, date range, and CAT or non-CAT. You can filter by more than one of these categories to define your report very specifically.

XactAnalysis displays the filtered graph.

![Chart showing Audit Results by Area](image)

You may notice that when you hold your cursor part of the graph, a pop-up appears, displaying the total estimate value for that area.

![Pop-up displaying total estimate value](image)
4. Click a radio button on the right to indicate the type of audit information you'd like to view for the selected area.

5. You can continue drilling-down to the contractor/adjuster level.
PERFORMANCE
The Performance reports allows you to compare two separate data types for your company. This report consists of two different graphs that you can set to any of the following data sets:

- Returned Estimate Value: The graph displays the gross value of all Returned and Corrected estimate values.
- Estimate Activity: The graph displays Total number of Returned, Corrected, and Rejected assignments.
- Zero Dollar Estimates: The graph displays the number of zero dollar estimates returned to XactAnalysis.
- Response Time: The graph displays response time in days for Contacted, Inspected and Returned statuses. It is calculated the same as the Response Time Management Report.
- Review Status: The graph displays the number of assignments that have reached the following statuses: Review Completed, Review Completed w/Exceptions, QA Approved and QA Rejected.

To view the performance report,

1. Choose Real-Time Management Dashboard from the Reports menu.

2. Click the Performance tab.

The Performance Reports page appears.

3. Select the client group, area, and date range you want to view performance reports for.

4. Select whether you want to view CAT, non-CAT, or both.
5. Click the drop-down button to choose the type of data you’d like to see in the graph on the left.

6. Click the drop-down button to choose the type of data you’d like to see in the graph on the right.

7. If you would like to see this data organized by a lower level of hierarchy than the one you selected in the Area field, click the Show drop-down button and select that hierarchy level.

8. Determine if you want to view the highest or lowest values for the data type selected, then click the corresponding radio button.

9. Click Submit.

XactAnalysis displays the two graphs side-by-side so that you can compare their data.
**USAGE**
The Usage report gives you data on how users in your company are using XactAnalysis.

To view the Usage report,

1. Choose **Real-Time Management Dashboard** from the **Reports** menu.
2. Click the **Usage** tab.

The Usage Report page appears, displaying the company usage of the management reports and program rules.

You can see the number of users in your company who use XactAnalysis. You can click here to choose management, industry, or activity reports.

### MOST USED REPORTS

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Company</th>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Value</td>
<td>26.20%</td>
<td>9.51%</td>
</tr>
<tr>
<td>Estimate Type of Loss</td>
<td>11.04%</td>
<td>2.81%</td>
</tr>
<tr>
<td>Response Time</td>
<td>6.99%</td>
<td>21.69%</td>
</tr>
<tr>
<td>Materials Budget</td>
<td>7.77%</td>
<td>1.54%</td>
</tr>
<tr>
<td>Contract Utilization</td>
<td>3.30%</td>
<td>3.81%</td>
</tr>
<tr>
<td>Estimate Quantity Usage</td>
<td>3.15%</td>
<td>2.25%</td>
</tr>
<tr>
<td>Estimate Generation Usage</td>
<td>3.14%</td>
<td>8.16%</td>
</tr>
<tr>
<td>Estimate Tracking Overview</td>
<td>5.10%</td>
<td>4.46%</td>
</tr>
<tr>
<td>Initial Response Time</td>
<td>2.03%</td>
<td>5.42%</td>
</tr>
</tbody>
</table>

### MOST USED PROGRAM RULES

<table>
<thead>
<tr>
<th>Program Rule</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimate Order Value - Estimate Value</td>
<td>20.00%</td>
</tr>
<tr>
<td>Estimate Order Quality and Net Profit - Show rule in this group</td>
<td>17.36%</td>
</tr>
<tr>
<td>Assignment Tracking - Assignment Delivered</td>
<td>14.75%</td>
</tr>
<tr>
<td>Changes to Price List Item - Percent of items with Drop Change</td>
<td>7.54%</td>
</tr>
<tr>
<td>Assignment Tracking - Labor Efficiency - Fattened In</td>
<td>7.21%</td>
</tr>
<tr>
<td>Assignment Tracking - Assignment Cancelled</td>
<td>5.57%</td>
</tr>
<tr>
<td>Price List Item Usage - Not in Price List</td>
<td>4.50%</td>
</tr>
<tr>
<td>Changes to Price List Items - Any rule in this group</td>
<td>2.82%</td>
</tr>
<tr>
<td>Assignment Tracking - Assignment Documents Received</td>
<td>2.39%</td>
</tr>
<tr>
<td>Assignment Tracking - Attention Needed</td>
<td>1.27%</td>
</tr>
<tr>
<td>Assignment Tracking - Original Estimates Unlocked</td>
<td>1.27%</td>
</tr>
</tbody>
</table>

* This tab displays data over the past 12 months.
3. Click a report to see the users who have viewed this report.

This information appears to the right of the Most Used Reports section.

You can also view the same information for the most used program rules.
INDUSTRY TREND REPORTS

While XactAnalysis Management trend reports (see “Viewing trend reports” on page 166) display information pertaining to claims from your specific company, XactAnalysis Industry Trend reports display information on various material and labor costs industry-wide, and are based on pricing data that is researched and published by XactAnalysis.

To view industry trend reports,

1. Choose **Industry Trend Reports** from the **Reports** menu.

   The *Industry Trend Reports* page appears, displaying the Average Estimate Value report.

![Industry Trend Reports](image)

**Note:** If you don’t see **Industry Trend Reports** from the **Reports** menu, you can be set up to view these reports from User’s Info in the XactAnalysis Admin module (see “Editing a user” on page 23.)
2. Click the **Report drop-down list button** to view the Industry Trend report you want to view.

By default, these reports show the industry trends for the last year.
3. If you choose, click on the hierarchy tree on the left to drill-down to industry trends for a specific area.

From here, you have several options in addition to simply reviewing the report data.

- **Display Report Data From**—You can choose to view the past two to five years by selecting that time frame from *Display Report Data From*.

- **Project Trend Line From**—The *Project Trend Line From* feature creates a line plot that displays the industry trends over the course of three years, ending with the selected point. XactAnalysis then projects the trend onto the graph for the years selected in the *Display Report Data From* field. For example, the trends from October 2003–2006 will be significantly different from the trends created from January 2007–2009, even if they're both created onto a report that runs from 2007–2009.

- **Compare**—The comparison checkboxes allow you to compare the selected location against national and/or state trends.

- **Printable View**—This link takes you to a copy of the report that is formatted to be printed in portrait

- **Export to Excel**—This link exports the report (including all the data below the graph) to Microsoft® Excel®.

- **Specific Trend Analysis**—This area explains some of the reasons behind the trends regarding this report.

- **Research and Analysis Overview**—This link brings up an explanation of how Xactware researches and updates the prices for its price lists.

For samples of available industry trend reports, see Appendix B, “Industry Trend Reports.”
ASSIGNMENT VOLUME

The Assignment Volume report displays the number of assignments your company has worked on during the selected time range. It also displays a catastrophe table that displays current catastrophe information based on date range, data set, estimate value, type of loss, and state.

The data in both the table and map can be based off of the same filters or they can be filtered independently of each other. You can view all current catastrophes or drill-down to one specific catastrophe and see additional detail.

To view your company's Assignment Volume reports,

1. Chose Assignment Volume from the Reports menu.

   The Assignment Volume window appears, showing a map of North America (or a smaller region, depending on where your company's assignments are located).

The default Assignment Volume report displays all assignments sent by all senders returned during the current month, regardless of category, type, estimate amount, or location. You can choose to filter out the information you don’t want to view.
2. Fill in any of the assignment map search criteria you want to use to filter the assignments on the map by. This includes type of loss, data set, estimate total, cat codes, status, and date.

   a. Select **Assign Queue** if you want to view the assignments currently in the queue, or select **In Progress** if you’d like to view assignments volume for all assignments that are currently in progress, or select the radio button to the right of **In Progress** if you’d like to view assignments based on some other status.

   If you selected **Assignment Queue** or **In Progress**, proceed to step 3 or step 7 to make adjustments to the map settings or use the cat table filter, or skip to step 8 to finish.

   b. Click the **status drop-down button** (Received, by default) to select the specific status you want to view assignment volume based on.

   You can choose from Received, Notified, Delivered, Returned, Corrected, Canceled, or Rejected.

   c. Click the date drop-down button to select the dates you’d like to see statuses for in step b.

   You can choose any of the previous 12 months, the previous four quarters, or the last 30/60/90 days.

   d. If you want, enter beginning and end dates you’d like to view assignment volume between.

   You can click the calendar buttons to select dates directly from the calendar.

To adjust the map settings,

3. Type a ZIP/postal code if you’d like to view the assignments for a specific ZIP/postal code.

4. Click the **Map size drop-down button** to select the size of the map you want to view.

5. Click the **Auto Update every 10 min.** checkbox if you want XactAnalysis to update the map every ten minutes.

6. Click the **Use Cat Table Filter for Assignment Map** if you want the map to reflect the selections from the Cat Table Filter (see below).

   Selecting this checkbox grays out the **Assignment Map Filter** fields.

7. Fill in any of the cat table search criteria you want to use to filter the assignments in the chart by.

   This includes type of loss, data set, estimate total, state/province, cat codes, status, and date.

8. Once you’ve finished adjusting your map filter, map settings, and cat table filter, click **Submit**.

   The new map appears with the selections you’ve chosen to view.
To drill-down to see more detail in the map,

9. Click the area you want to view assignment volume for.
XactAnalysis displays the breakdown of the assignment volume for the area.

10. Continue clicking to the area you want to view.
XactAnalysis displays a breakdown of the assignment volume for the area, along with a list of the recipients of the assignments.
11. After you've drilled-down to the area you want to view, click the number in the *Shown* link to see the assignments in the area.

A search results page appears, listing the assignments in this area.

<table>
<thead>
<tr>
<th>#</th>
<th>Claim #</th>
<th>Att #</th>
<th>Total $</th>
<th>CAT Code</th>
<th>Loss Type</th>
<th>Job Type</th>
<th>Insured</th>
<th>Zip</th>
<th>Contractor</th>
<th>Claim Rep Code</th>
<th>XactNet</th>
<th>Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>926.73463</td>
<td>9,263.59</td>
<td>WATER</td>
<td>General</td>
<td>Tim Cutter</td>
<td>70021-4324</td>
<td>Stanley Restoration</td>
<td>M5AC</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>927.74954</td>
<td>9,749.61</td>
<td>WATER</td>
<td>General</td>
<td>Jason Hendrick</td>
<td>70021-4156</td>
<td>ABC Cleaners</td>
<td>ABCG</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>927.74724</td>
<td>2,075.61</td>
<td>LIGHTING</td>
<td>General</td>
<td>Lily Martinez</td>
<td>70021-21.82</td>
<td>Johnson Restorers</td>
<td>BMTR</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>927.74944</td>
<td>1,271.78</td>
<td>WATER</td>
<td>Water Extraction</td>
<td>Mark B. Gray</td>
<td>70021-26.97</td>
<td>ABC Cleaners</td>
<td>GDOS</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>928.83262</td>
<td>1,201.79</td>
<td>WATER</td>
<td>General</td>
<td>Jen Ullery</td>
<td>70021-25.27</td>
<td>Neveral Cleaners</td>
<td>XYZC</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>929.73147</td>
<td>9,559.61</td>
<td>VINO</td>
<td>Roofing Only</td>
<td>Otto Kohler</td>
<td>70021-54.17</td>
<td>Stanley Restoration</td>
<td>SKLS</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ASSIGNMENT VOLUME BY ZIP

The Assignment Volume by ZIP report displays the number of assignments your company has worked on during the selected time range. It displays its maps in a different format than the Assignment Volume report.

To view your company’s Assignment Volume reports,

1. Chose Assignment Volume by ZIP from the Reports menu.

The Assignment Volume window appears, showing a map of the United States, delineated by state.

![Map of the United States with Assignment Volume by ZIP]

*In Progress* is defined as assignments not yet returned within the last 30 days.

---

**Note:** You can talk to your XactAnalysis account representative to set up Assignment Volume by ZIP to always display a specific state/province upon opening.

The default Assignment Volume report displays all assignments sent by all senders returned during the current month, regardless of category, type, estimate amount, or location. You can choose to filter out the information you don’t want to view.

a. Click the Data Set drop-down button to select a different client group to view assignment volume for.

b. Select In Progress if you’d like to view assignments volume for all assignments that are currently in progress.

Skip to step d if you select In Progress.
c. Click the **Returned drop-down button** if you’d like to view assignment volume based on status. You can choose from Received, Delivered, Corrected, Canceled, Rejected, or keep the Returned setting.

d. Click the date drop-down buttons to select the date you’d like to base the viewed assignment volume on. You can choose any of the previous 12 months, or the previous four quarters.

e. Click the **Non-Cat** or **Cat** radio buttons if you’d like to filter out one or the other.

f. Click the **Type of Loss drop-down button** to select the type of loss you want to view assignment volume for.

g. Click the **Estimate $ drop-down button** to select the estimate value range.

h. Type a ZIP/postal code if you’d like to view the assignments for a specific postal code.

i. Click the **Map size drop-down button** to select the size of the map you want to view.

j. Click to remove the checkmark from the **Show Plot Points checkbox** if you’d rather not see the plot points.

k. Click **Submit**.

The new map appears with the selections you’ve chosen to view.

To drill-down to see more detail in the map,

2. Click the state you want to view assignment volume for.

XactAnalysis displays the breakdown of the assignment volume in the state.
3. Click on the county you want to view.
XactAnalysis displays a breakdown of the assignment volume for the county, along with a list of the recipients of the assignments.

4. Click the ZIP code you’d like to further view assignments for.
A search results page appears, listing the assignments in this ZIP code.

<table>
<thead>
<tr>
<th></th>
<th>Claim #</th>
<th>Amt</th>
<th>CAT Code</th>
<th>Loss Type</th>
<th>Job Type</th>
<th>Insured</th>
<th>Zip</th>
<th>Contractor</th>
<th>Claim Rep Code</th>
<th>XactRep</th>
<th>Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5287463</td>
<td>$4,263.54</td>
<td>WATER</td>
<td>General</td>
<td>Tim Cutter</td>
<td>70021-4234</td>
<td>VSA Contractors</td>
<td>VSA CTR</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>5274766</td>
<td>$674.81</td>
<td>WATER</td>
<td>General</td>
<td>Jason Hendricks</td>
<td>70021-4118</td>
<td>ABC Cleaners</td>
<td>ABCC</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>5214324</td>
<td>$3,073.61</td>
<td>LIGHTING</td>
<td>General</td>
<td>Lily Hennings</td>
<td>70021-5703</td>
<td>Smith Restoration</td>
<td>SMR</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>5271691</td>
<td>$1,271.79</td>
<td>WATER</td>
<td>Water Restoration</td>
<td>Michelle Gray</td>
<td>70021-2527</td>
<td>Goodie Services</td>
<td>GDGS</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>5214543</td>
<td>$1,057.58</td>
<td>WATER</td>
<td>General</td>
<td>Ian Lacey</td>
<td>70021-2527</td>
<td>XYZ Construction</td>
<td>XYZC</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>5227501</td>
<td>$9,058.61</td>
<td>VNO</td>
<td>Roofing Only</td>
<td>Otto Kahler</td>
<td>70021-3417</td>
<td>Smith Restoration</td>
<td>SMR</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>5237505</td>
<td>$9,021.84</td>
<td>WATER</td>
<td>General</td>
<td>Hannah Christensen</td>
<td>70021-3302</td>
<td>ABC Restoration</td>
<td>ABCR</td>
<td>Returned</td>
<td>Inspected</td>
<td></td>
</tr>
</tbody>
</table>
Chapter 5
The XactAnalysis Assignment Cycle

Now that you’ve got XactAnalysis set up and ready to go, you’ll need to understand the information flow. The following scenario should help you understand how XactAnalysis and Xactimate work together and how you, contractors, and Xactware work in conjunction with each other. Your company may have different procedures from what is mentioned here, but the basic process should be the same.

*Note: The following procedure runs through the steps to accepting the assignment in Xactimate v.25. Long-time users of Xactimate v.24 will recognize the steps as being similar.*
STARTING AN ASSIGNMENT

Let’s suppose you work for Safe Haven Insurance, and one of your insureds, Mr. James Smith of Orem, Utah, calls about a kitchen fire in his house. You talk to him and get the basic information, and find out that this kitchen fire is a little bigger than most.

When you log into XactAnalysis, you click Send Work Assignment.

The Send Work Assignment page appears. Enter all the information for Mr. Smith and his property. Based on his information, you will enter this job type as emergency and call it moderate-sized, since you think it may
run a little over $4,000. XactAnalysis suggests WSA Contractors as the contractor, which is next on the rotation list. You enter a note about James, his policy information, and now you’re ready to click Submit.

A copy of the assignment appears for you to review, and since it’s correct, you click Send Assignment. The Assignment is sent to the contractor as a SmartObject.
**AFTER THE ASSIGNMENT IS SENT**

The contractor selected, WSA Contractors, receives an email (since email is how the contractor notification was set up) saying that an assignment has arrived. Mr. Wendell Andreasson of WSA opens Xactimate and connects. He sees that he has a downloaded assignment in his *XactNet Communications Inbox*, so he clicks *Accept* to add it to his Projects SmartList.
The Smith estimate is added to the *Recent Projects/New Assignments* pane.

Mr. Andreasson takes his laptop and goes to the Smith household to complete the estimate in Xactimate. After the estimate is finished, he marks the estimate as “A/Completed,” then saves and exits the estimate.
Mr. Andreasson now returns to the Xactimate Control Center, where this estimate has been packaged as a SmartObject in his Outbox, ready to return to XactAnalysis.

He connects, and the SmartObject is returned.
The Estimate Is Returned

You receive an email (if you've set up with Xactware to do so, which Safe Haven has) letting you know the estimate has returned to you. You open XactAnalysis, and click Advanced Search, choose the correct dates, then click Submit.
The assignment is returned as a completed estimate and is located at the top of the list of assignments received.

You click the Assignment ID link to see the assignment information.
You click the Documents tab, then the Price List Variation Usage Report link. This report displays information from this estimate, including line item amounts and estimate totals, and the variation between the price list and checkpoint price list.

You can now contact WSA Contractors to have them begin work on the job.
SUMMARY
These procedures are followed for the estimation notification process to work:

- Insured informs carrier of property damage.
- Carrier enters basic property information into XactAnalysis as an assignment.
- XactAnalysis sends assignment to assigned contractor and notifies contractor by page, email, voice, or fax.
- Contractor downloads assignment and accepts it into Xactimate.
- Contractor completes the estimate in Xactimate and changes status to “Complete.”
- Contractor uploads the completed assignment to XactAnalysis.
- XactAnalysis notifies carrier that estimate has been returned.
- Carrier reviews completed estimate information and contacts contractor.
Appendix A
Management/Activity Reports

This appendix contains samples (using fictitious data) of the following activity reports available in XactAnalysis. Not all reports are available to all users.

- Assignment Aging (page 204)
- Average File Size (page 206)
- Contents Line Item Summary by Adjuster (page 207)
- Contents Salvage Recovery by Adjuster (page 207)
- Contents Salvage Recovery by Department/Group/Type (page 208)
- Estimate Correction Summary (page 210)
- Summarized Executive Overview (page 212)
- Xactimate Versions and Profiles (page 214)
- Assignment Summary (page 205)
- Contents Claim Summary (page 206)
- Contents Salvage Recovery by Adjuster (page 207)
- Contractor/Claim Rep Activity (page 209)
- Estimate Review Summary (page 211)
- Transaction Counts (page 213)

The following Excel report also appears in this appendix.

- Desk Adjuster (page 215)
- Personal Rules Report (page 216)
- Duplicate Assignment Per Job Type (page 215)
The following graphical reports are available in XactAnalysis. Not all reports are available to all users.

<table>
<thead>
<tr>
<th>▲ Corrosion Mitigation (page 217)</th>
<th>▲ Corrosion Mitigation Opportunity (page 218)</th>
</tr>
</thead>
<tbody>
<tr>
<td>▲ Estimate Depreciation Usage (page 219)</td>
<td>▲ Estimate Flooring Usage (page 220)</td>
</tr>
<tr>
<td>▲ Estimate Inclusion Issues (page 221)</td>
<td>▲ Estimate Items by Quality (page 226)</td>
</tr>
<tr>
<td>▲ Estimate Minimum/Base Service Charge Usage (page 227)</td>
<td>▲ Estimate NFCP Usage Report (page 228)</td>
</tr>
<tr>
<td>▲ Estimate Overhead and Profit (page 229)</td>
<td>▲ Estimate Roofing Usage (page 230)</td>
</tr>
<tr>
<td>▲ Estimate Salvage Retained Report (page 231)</td>
<td>▲ Estimate Scoping Overlap (page 232)</td>
</tr>
<tr>
<td>▲ Estimate Siding Usage (page 237)</td>
<td>▲ Estimate Tax Usage (page 238)</td>
</tr>
<tr>
<td>▲ Estimate Type of Loss (page 239)</td>
<td>▲ Estimate/Price List Differences (page 240)</td>
</tr>
<tr>
<td>▲ Labor Efficiency Usage (page 241)</td>
<td>▲ Percentage Breakdown of Estimate by Trade (page 242)</td>
</tr>
<tr>
<td>▲ Salvageable Flooring (page 243)</td>
<td>▲ Top 20 Material Categories (page 244)</td>
</tr>
</tbody>
</table>

Samples of the following text reports are also contained in this appendix.

<table>
<thead>
<tr>
<th>▲ Average Value (page 245)</th>
<th>▲ Contents Cost Comparison Report (page 246)</th>
</tr>
</thead>
<tbody>
<tr>
<td>▲ Contractor/Claim Rep Utilization (page 247)</td>
<td>▲ Estimate Audit Results (page 248)</td>
</tr>
<tr>
<td>▲ Estimate Breakdown by NFCP Reasons Report (page 250)</td>
<td>▲ Estimate Breakdown by Trade (page 251)</td>
</tr>
<tr>
<td>▲ Estimate Breakdown by Type (page 252)</td>
<td>▲ Estimate Salvage Recovery by Adjuster Report (page 252)</td>
</tr>
<tr>
<td>▲ Estimate Salvage Recovery by Department Report (page 253)</td>
<td>▲ Estimates with Sketches and Photos (page 253)</td>
</tr>
<tr>
<td>▲ Frequently Used Items (page 254)</td>
<td>▲ Initial Response Time (page 255)</td>
</tr>
<tr>
<td>▲ Loss Value Range (page 256)</td>
<td>▲ Materials Budget (page 258)</td>
</tr>
<tr>
<td>▲ Miscellaneous Items (page 259)</td>
<td>▲ Price Deviations (page 260)</td>
</tr>
<tr>
<td>▲ Response Time (page 261)</td>
<td>▲ Sub limits Report (page 262)</td>
</tr>
<tr>
<td>▲ Supplement (page 263)</td>
<td>▲ Type of Loss (page 264)</td>
</tr>
<tr>
<td>▲ Value Range (page 265)</td>
<td>▲ ZIP Codes (page 266)</td>
</tr>
</tbody>
</table>

The following Trend Reports also appear in this appendix.

<table>
<thead>
<tr>
<th>▲ Estimate Trending (page 267)</th>
<th>▲ Estimate Breakdown by Labor/Materials/Equipment (page 268)</th>
</tr>
</thead>
<tbody>
<tr>
<td>▲ Estimate Trending for Contents (page 270)</td>
<td></td>
</tr>
</tbody>
</table>
**ACTIVITY REPORTS**

**ASSIGNMENT AGING**
The Assignment Aging report displays estimates that have 1–2 weeks and 2+ weeks of inactivity. Estimates are removed from this report once they are Returned, Cancelled, or Rejected.

---

### Assignment Aging Report

<table>
<thead>
<tr>
<th>Assignment</th>
<th>1-2 weeks since last activity</th>
<th>2+ weeks since last activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Construction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3014-95347</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Totals for ABC Construction</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Bob and Sons</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3014-74247</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Totals for Bob and Sons</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Frederickson Construction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3014-10323</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3014-85716</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Totals for Frederickson Construction</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Geode Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3014-99915</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Totals for Geode Services</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Kendall Construction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3014-85711</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Totals for Kendall Construction</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>WSA Contractors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3014-94932</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Totals for WSA Contractors</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1-2 weeks since last activity</th>
<th>2+ weeks since last activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>6</td>
</tr>
</tbody>
</table>
**ASSIGNMENT SUMMARY**

The Assignment Summary report tracks assignment totals for the selected date range. The first report displays this information by region, program area, and office, but if you drill-down, you can see this information subdivided by contractor. You can view the number of estimates a contractor has received over the selected date range, how many estimates the contractor has completed and returned, and if the contractor has canceled any assignments.

### ASSIGNMENT SUMMARY

- **Region**: All
- **Date Range**: 01/02/2000 through 06/30/2000
- **Data Type**: CAT and Non-CAT
- **Program Area**: Both Residential & Commercial
- **Office**: Company Wide

#### Rocky Mountain - Orem Area

<table>
<thead>
<tr>
<th>In Queue</th>
<th>Received</th>
<th>Delivered</th>
<th>Returned</th>
<th>Corrected</th>
<th>Cancelled</th>
<th>Rejected</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Construction (ABC, OREM.UT2)</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Awesome Builders (AWES.SPAHIneFork.UT1)</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Bob and Sara (BOBS.OREM.UT3)</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Bravo Construction (BRVO.OREM.UT3)</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Construction Construction (CONCON.PROVO.UT1)</td>
<td>25</td>
<td>0</td>
<td>25</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Davidson Construction (DAVIDD.OREM.UT2)</td>
<td>7</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Fredrickson Construction (FRED.OREM.UT2)</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Gente Bas Construction (GENTE PROVO.UT1)</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Goose Services (GODDE OREM.1)</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Johnson Restorations (JOHNSONR.PROVO.UT2)</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Kendall Construction (KEND.SPANISHFORK.UT1)</td>
<td>4</td>
<td>4</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Lionheart Restoration (LION.PROVO.UT2)</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>LPT Construction (LPTC.PROVO.UT2)</td>
<td>11</td>
<td>10</td>
<td>3</td>
<td>0</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>Maniacus Construction (MANIC.UT2)</td>
<td>17</td>
<td>17</td>
<td>0</td>
<td>11</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Not Any Of Construction Company (NOTANY.ORE)</td>
<td>6</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Smiley Construction (SMILEY.PROVO.UT2)</td>
<td>5</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Smith Restoration (SMILEY.OREM.UT1)</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Super Deap Restoration (SUPER.PROVO.UT4)</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Total Restoration (TOTAL.PROVO.UT)</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>WSA Contractors (WSA.OREM.UT1)</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>XYZ Construction (XYZ.OREM.UT2)</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Totals for Orem Area**

| Total | 100 | 59 | 50 | 1 | 27 | 12 |
**AVERAGE FILE SIZE**
This report tracks the "average file size" of your returned estimates for any period of time 12 months or less. This allows you to track the total and average file size for estimates uploaded by each contractor/adjuster.

The file size consists of custom documents, photos, and sketch files uploaded from Xactimate or through XactAnalysis SP.

---

**CONTENTS CLAIM SUMMARY**
This report summarizes the RCV benefits and RCV payments made for estimates that were received within the specified date range. Drill down for details on the selected ZIP Code.
**CONTENTS LINE ITEM SUMMARY BY ADJUSTER**
This report shows the number of Contents line items priced by each appraiser/adjuster, the number of line items that each adjuster is responsible for, and the number of claims participated in by each appraiser. It also shows the average line items per claim as well as the average dollar amount per line item.

<table>
<thead>
<tr>
<th>Contract/Claim Rep</th>
<th># of Lines Priced</th>
<th>Total Lines</th>
<th># of Claims Participated</th>
<th># of Claims Owned</th>
<th>Average Lines Priced Per Claim</th>
<th>Average Line Item Price</th>
<th># of Skipped Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Akron Bruno (ACERUNO SH)</td>
<td>33</td>
<td>33</td>
<td>3</td>
<td>3</td>
<td>11</td>
<td>$1,125</td>
<td>7</td>
</tr>
<tr>
<td>CBROWER (CBROWER SH)</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>$281</td>
<td>0</td>
</tr>
<tr>
<td>ILOVE (ILOVE SH)</td>
<td>82</td>
<td>82</td>
<td>1</td>
<td>1</td>
<td>82</td>
<td>$233</td>
<td>24</td>
</tr>
<tr>
<td>ONLIPRE (ONLIPRE SH)</td>
<td>23</td>
<td>23</td>
<td>1</td>
<td>1</td>
<td>23</td>
<td>$435</td>
<td>4</td>
</tr>
<tr>
<td>KDSMITH (KDSMITH SH)</td>
<td>143</td>
<td>180</td>
<td>4</td>
<td>4</td>
<td>36.8</td>
<td>$265</td>
<td>81</td>
</tr>
<tr>
<td>Totals for Safe Haven</td>
<td>314</td>
<td>351</td>
<td>11</td>
<td>11</td>
<td>20.5</td>
<td>$337</td>
<td>116</td>
</tr>
</tbody>
</table>

**CONTENTS SALVAGE RECOVERY BY ADJUSTER**
This report summarizes the salvage and indemnity costs, grouped by adjuster, for estimates that were closed within the specified date range. Drill down for details on the selected adjuster.
**Contents Salvage Recovery by Department/Group/Type**

This report summarizes the salvage and indemnity costs, grouped by department, group and type for estimates that were closed within the specified date range. Drill down for details on the selected type.

<table>
<thead>
<tr>
<th>Department</th>
<th>Group</th>
<th>Type</th>
<th>Total Claim Value</th>
<th>Total Salvage Retained by Insurer</th>
<th>Total Salvage Recovered by Salvor</th>
<th>Total Indemnity Cost</th>
<th>Total % Value Recovered by Salvage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appliances - Small</td>
<td>Buffet &amp; Warming Trays</td>
<td>Warming Tray</td>
<td>$10,019</td>
<td>$0</td>
<td>$20</td>
<td>$9,999</td>
<td>100.2%</td>
</tr>
<tr>
<td>Automotive &amp; Motorcycle Accessories</td>
<td>Diet Bike</td>
<td>Diet Bikes</td>
<td>$587</td>
<td>$120</td>
<td>$0</td>
<td>$467</td>
<td>100.0%</td>
</tr>
<tr>
<td>Automotive &amp; Motorcycle Accessories</td>
<td>Go-Kart</td>
<td>Go-Karts</td>
<td>$4,554</td>
<td>$0</td>
<td>$3</td>
<td>$4,551</td>
<td>100.1%</td>
</tr>
<tr>
<td>Books, Magazines, &amp; Periodicals</td>
<td>Non - ML</td>
<td>MISC</td>
<td>$3,847</td>
<td>$350</td>
<td>$110</td>
<td>$3,387</td>
<td>102.9%</td>
</tr>
<tr>
<td>Cameras, Camcorders &amp; Equipment</td>
<td>Camcorder - Digital</td>
<td>DVD Digital Camcorder</td>
<td>$52,023</td>
<td>$0</td>
<td>$3</td>
<td>$52,020</td>
<td>100.0%</td>
</tr>
<tr>
<td>Cameras, Camcorders &amp; Equipment</td>
<td>Camcorder - Digital</td>
<td>Mini DV (Tape) Digital Camcorder</td>
<td>$38,291</td>
<td>$223</td>
<td>$0</td>
<td>$38,068</td>
<td>100.0%</td>
</tr>
<tr>
<td>Clothing &amp; Accessories</td>
<td>Non - ML</td>
<td>MISC</td>
<td>$1,950</td>
<td>$50</td>
<td>$0</td>
<td>$1,900</td>
<td>100.0%</td>
</tr>
<tr>
<td>Computers &amp; Related Goods</td>
<td>Laptop Systems</td>
<td>Laptops &amp; Notebooks</td>
<td>$38,471</td>
<td>$180</td>
<td>$30</td>
<td>$38,261</td>
<td>100.1%</td>
</tr>
<tr>
<td>Electronics</td>
<td>Cellular Phones &amp; Accessories</td>
<td>Hands-Free Kit</td>
<td>$193,848</td>
<td>$0</td>
<td>$30</td>
<td>$193,818</td>
<td>100.0%</td>
</tr>
<tr>
<td>Electronics</td>
<td>Home Theater Systems</td>
<td>Virtual Surround Systems</td>
<td>$26,313</td>
<td>$12</td>
<td>$0</td>
<td>$26,301</td>
<td>100.0%</td>
</tr>
<tr>
<td>Electronics</td>
<td>Non - ML</td>
<td>Automotive amplifier</td>
<td>$1,543</td>
<td>$60</td>
<td>$0</td>
<td>$1,483</td>
<td>100.0%</td>
</tr>
<tr>
<td>Electronics</td>
<td>Non - ML</td>
<td>MISC</td>
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<td>$135</td>
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<td>Bed Frames - Twin/Twin XL</td>
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**CONTRACTOR/CLAIM REP ACTIVITY**

The Contractor Activity report displays the contractors your company has worked with during the selected date range, and the status of the assignments sent to each contractor. Drilling down on a contractor shows you the actual assignments sent to the contractor, along with the date and time each status was achieved.

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<th>Contractor/Claim Rep Activity</th>
<th>Notified</th>
<th>Delivered</th>
<th>Returned</th>
<th>Corrected</th>
<th>Cancelled</th>
<th>Rejected</th>
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Totals for Area: 14, 59, 50, 1, 27, 12
ESTIMATE CORRECTION SUMMARY
This report will track estimate correction counts and dollar amounts between the first and last uploaded estimate versions.

<table>
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<tr>
<th>Safe Haven</th>
<th>Program Area</th>
<th>Returned</th>
<th>Corrected</th>
<th>Avg Corrections per Estimate</th>
<th>Initial Est Value</th>
<th>Final Est Value</th>
<th>$ Difference (Overall)</th>
<th>% Difference (Overall)</th>
<th>$ Difference (Up)</th>
<th>% Difference (Up)</th>
<th>$ Difference (Down)</th>
<th>% Difference (Down)</th>
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### ESTIMATE REVIEW SUMMARY

The Estimate Review Summary report displays information about each of the assigned reviewers, including number of reviews assigned, accepted, completed, and still outstanding. The report also displays the time it took for the reviewer to accept each review, and the average review time.

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Estimates Reviewed</th>
<th>Time to Accept</th>
<th>Avg. Review Time</th>
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<tbody>
<tr>
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<td>Accepted</td>
<td>Completed</td>
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<tr>
<td>Aaron Nelson</td>
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<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Dan Douglas</td>
<td>4</td>
<td>3</td>
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</tr>
<tr>
<td>Drew Brooks</td>
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<td>2</td>
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</tr>
<tr>
<td>Frank Paine</td>
<td>10</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Travis Johnson</td>
<td>8</td>
<td>8</td>
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<tr>
<td>Zane Smith</td>
<td>8</td>
<td>6</td>
<td>5</td>
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</table>

**Totals for Orem Area**: 43, 32, 25, 7, 15, 10, 7, 0, 15

Unassigned Reviews: 0

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(Excel is a trademark of Microsoft Corporation)
**SUMMARIZED EXECUTIVE OVERVIEW**

The Summarized Executive Overview report displays all levels of the hierarchy that you select, and shows the status of all assignments during the date range selected.

When you drill-down on one of the links, XactAnalysis displays the contractors used and the amount of activity for each status during the related date range.
**Transaction Counts**

This report displays number of transactions that have occurred within the selected region in the selected time span.
**Xactimate Versions and Profiles**

This report shows the Xactimate version, last upload date, last connect date, and profiles installed for each contractor/adjuster.

![Xactimate Version and Profiles Report](image)

---

<table>
<thead>
<tr>
<th>Staff Name</th>
<th>Xactimate Version</th>
<th>Minor Version</th>
<th>Last Connect Date</th>
<th>Last Estimate Upload Date</th>
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<td>14-May-2009 09:16AM</td>
<td>14-May-2009 09:15AM</td>
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<td>06-Apr-2009 05:05PM</td>
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<td>31-Mar-2009 12:02PM</td>
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<td>03-Apr-2008 03:29PM</td>
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<tr>
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<td>16-Apr-2009 01:35PM</td>
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**EXCEL™ REPORTS**

**DESK ADJUSTER**
This report shows a breakdown of how many claims a desk adjuster has assigned in the different data sets. The report also give a breakdown of the individual claims for the desk adjuster.

![Excel Report Example](image1.png)

**DUPLICATE ASSIGNMENT PER JOB TYPE**
This report displays duplicate assignments that have the same claim number and job type.

![Duplicate Assignment Example](image2.png)
PERSONAL RULES REPORT
The Personal Rules Excel™ management report shows each rule that was triggered, as well as information about the estimate that triggered each rule.

![Excel spreadsheet showing personal rules report]

1. Personal Rules

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**GRAPHICAL MANAGEMENT REPORTS**

**CORROSION MITIGATION**

This report tracks the mitigation benefit gained by pre-cleaning a smoke damaged item versus replacing that item in fire/smoke/soot losses.

---

The diagram shows a bar chart comparing mitigation benefits for New York and Los Angeles, with two categories: **Safe Haven - DRP** and an unspecified category. The chart illustrates the estimated mitigation cost and savings for each location, highlighting the financial impact of pre-cleaning versus replacement.

**NOTE:** All amounts are in U.S. Dollars.
CORROSION MITIGATION OPPORTUNITY

This report tracks the number of fire/smoke/soot claims, and compares that to the number of estimates that used pre-cleaning items to provide you with information on how often corrosion mitigation is used.
**ESTIMATE DEPRECIATION USAGE**

This report presents the percentage of estimates where depreciation was applied.

![Graphical Management Reports](image-url)
Graphical Management Reports

**ESTIMATE FLOORING USAGE**

This report presents material quantities and line item totals for the seven different Flooring categories used in Xactimate: Carpet, Carpet Pad, Resilient, Stone, Tile, Vinyl, and Wood.
**Estimate Inclusion Issues**

This report presents the percentage of instances where work may have been duplicated. It does this by detecting combinations of item codes that involve duplication.

You can drill-down to the line-item level of this report to see the actual line items that have violated this rule.

The following are all the possible inclusion rules that are checked in each estimate. These rules will be updated as necessary with the date the rule gets updated indicated.

- **Base Shoe**
  - **Goal:** Make us aware of any case where the total lineal footage of base shoe molding is greater than the total lineal footage of perimeter walls.
  - **Rule:** If finish carpentry base trim with cap and shoe (FNC BC* + FNC B6S) appears in the same room as finish carpentry shoe molding (FNC SHOE*), or laminate floor quarter round (FCW LAMQ) and the total lineal footage (of FNC BC* + FNC B6S + FNC SHOE* + FCW LAMQ) is greater than the total lineal footage of the walls (PF), or if the lineal footage (LF) of finish carpentry shoe molding (FNC SHOE*) or laminate floor quarter round (FCW LAMQ) is greater than the total lineal footage of walls as defined by the (PF) variable in a room, then report.
Door Hardware (Hinges)

Goal: Make us aware of any case where common pre-hung doors are found in the same room with separate listings for hinges.

Rule: If any of these types of pre-hung doors (DOR AV*, DOR BIRCH, DOR BIRCH+, DOR COL, DOR COL+, DOR DUTCH, DOR FR, DOR FR+, DOR FR2, DOR FR2+, DOR LVR*, DOR MAH, DOR MAH+, DOR MAH++, DOR OAK, DOR OAK+, DOR OAK++, DOR PNL, DOR PNL+, DOR PNL++, DOR FRI, DOR FRI+, DOR FR18, DOR FR182, DOR FR12, DOR FR12+) are found in the same room with finish hardware hinges (FNH HING*), then report. (The “Door Hardware” rule was modified on November 29, 2000 to remove the checking of additional amounts of casing and/or door jambs. This rule was modified since many rooms include these items for use on windows and cased openings.)

Door Hardware (Removal)

Goal: Make us aware of any case where doors are listed for removal in the same room where door hardware (which should come off with the door without added effort) is also listed for removal.

Rule: If any of these types of pre-hung doors (DOR AV*, DOR BIRCH, DOR BIRCH+, DOR COL, DOR COL+, DOR DUTCH, DOR FR, DOR FR+, DOR FR2, DOR FR2+, DOR LVR*, DOR MAH, DOR MAH+, DOR MAH++, DOR OAK, DOR OAK+, DOR OAK++, DOR PNL, DOR PNL+, DOR PNL++, DOR FRI, DOR FRI+, DOR FR18, DOR FR182, DOR FR12, DOR FR12+) are found in the same room with finish hardware hinges (FNH HING*), then report. (Added 8’ French doors (DOR FRI8 and DOR FRI82), as of 29-March-2006.)

Drywall/Wallpaper

Goal: Make us aware of any case where wallpaper is removed from drywall that is also listed as removed (wallpaper should come off with drywall without additional effort).

Rule: If the combination of drywall removal and/or wallpaper removal (DRY * - (Remove) + WPR * - (Remove)) from the walls is greater than the square footage of the walls (W), or the combination of drywall removal and/or wallpaper removal (DRY * - (Remove) + WPR * - (Remove)) from the ceiling is greater than the square footage of the ceiling (C), or the combination of drywall removal and/or wallpaper removal (DRY * - (Remove) + WPR * - (Remove)) from the walls and ceiling is greater than the square footage of the walls and ceiling (WC) in a room, then report.

Exterior Door and Lockset

Goal: Make us aware of any case where the number of exterior doors does not match the number of exterior locksets.

Rule: If DOR DUTCH*, DOR FRX*, DOR X-, DOR X, DOR X+, DOR X++, DOR X++, DOR XG, DOR XPD*, DOR XSM, or DOR XSM+ exists in a room without FNH DORHX*, FNH DBX*, or FNH DBXRS* (except R (Detach and Reset), then report. (This rule was added December 19, 2002. Any estimates that violate this rule will have been created since then.)

Flooring Removal

Goal: Make us aware of any case where flooring waste is included in the removal quantity (no need to remove waste material—applies to replace/installation only).

Rule: If the total square footage (SF) of vinyl floor removal (FCV * - (Remove)), resilient floor removal (FCR* - (Remove)), wood floor removal (FCW* - (Remove)), tile floor removal (FCT* - (Remove)), stone floor removal (FCS* - (Removal)), carpet removal (FCC * - (Remove) except FCC PAD*, FCC PFE, FCC PRE3/8)), or carpet pad removal (FCC PAD* - (Remove)) + (FCC PFE - (Remove)) + (FCC PRE3/8 - (Remove)) or underlayment removal (FRM UL* - (Remove) and FCV UL* - (Remove)) exceeds the square footage of flooring (F) in the room, then report.
Graphical Management Reports

- **Interior Door and Lockset**
  For the + and & activities: If Door and Lockset activities (interchangeable) and quantities match then no error; if not, then error for number of doors does not match number of locksets.

  For the R activity: If you + or & the door and R the lockset it should not report an error.

  **Goal:** Make us aware of any case where the number of interior doors does not match the number of interior locksets.

  **Rule:** If the number of doors in a room, (DOR AV*, DOR MAH*, DOR OAK*, DOR PNL*, DOR COL*, DOR FRI*, DOR BIRCH*, DOR LVR*, DOR WDB*, DOR WDL*, DOR WDO*, DOR WDP*), does not match the number of locksets in the room, (FNH DORH-, FNH DORH, FNH DORH+, FNH DORH++, FNH LOK*, FNH CDB* (except R (Detach and Reset)), then report. (This rule was added December 19, 2002. Any estimates that violate this rule will have been created since then.)

- **Pocket Door and Lockset**
  **Goal:** Make us aware of any case where a pocket door and a separate entry for a lockset exist in the same room.

  **Rule:** If a pocket door (DOR PKT*) and door hardware (FNH DORH*) exist in the same room, then report (except where an interior door also exists (DOR AV*, DOR MAH*, DOR OAK*, DOR PNL*, DOR COL*, DOR FRI, DOR FRI+, DOR FRI-, DOR FRI2, DOR FRI2+, DOR DUTCH*, DOR BIRCH*, DOR LVR*). (This rule was added December 19, 2002. Any estimates that violate this rule will have been created since then.)

- **Remove Sink & Hardware**
  **Goal:** Make us aware of any case where removing a faucet and/or garbage disposer is used in the same room as removing a sink (removing faucet and disposer take no additional effort).

  **Rule:** If removing a faucet item or garbage disposer (PLM FAU* - (Remove), or APP GD* - (Remove)) are used in the same room as removing a sink (PLM SNK* - (Remove)) then report. (This rule was added November 29, 2000. Any estimates that violate this rule will have been created since then.)

- **Remove Toilet & Seat**
  **Goal:** Make us aware of any case where removing a toilet is used in the same room as removing a toilet seat (removing toilet seat takes no additional effort).

  **Rule:** If removing a toilet (PLM TLT * - (Remove)) is used in the same room as removing a toilet seat (PLM TLTS * - (Remove)) then report. (This rule was added November 29, 2000. Any estimates that violate this rule will have been created since then.)

- **Reset Doors & Hardware**
  **Goal:** Make us aware of any case where detaching and resetting a door is used in the same room as detaching and resetting any type of hardware mounted to the door (resetting door hardware takes no additional effort).

  **Rule:** If detaching and resetting a door (DOR AV* R (Reset) or DOR BIRCH* R (Reset) or DOR COL* R (Reset) or DOR FR* R (Reset) or DOR FR2RS or DOR FRRS or DOR LVR* R (Reset) or DOR MAH* R (Reset) or DOR OAK* R (Reset) or DOR WDB* R (Reset) or DOR WDL* R (Reset) or DOR WDO* R (Reset) or DOR WDP* R (Reset) or DOR X- R (Reset) or DOR X R (Reset) or DOR X+ R (Reset) or DOR X++ R (Reset) or DOR X+++ R (Reset) or DOR XSM R (Reset) or DOR XSM+ R (Reset) or DOR XSM++ R (Reset) or DOR XRS or DOR DUTCH R (Reset) or DOR DUT-RS or DOR DOR-RS or DOR DORRS) is used in the same room as resetting any type of hardware mounted to the door (FNH D* R (Reset) or FNH DORHRS or FNH HOLD R (Reset) or FNH HOLDRS or FNH KICK R (Reset) or FNH KICKRS or FNH KNOCK* R (Reset) or FNH KNOCKRS or FNH PEEP* R (Reset) or FNH PEEPRS or FNH PH* R (Reset) or FNH PU* R (Reset)) then report. (This rule was added November 29, 2000. Any estimates that violate this rule will have been created since then.)
Graphical Management Reports

- **Reset Int. Trim**
  
  **Goal:** Make us aware of any case where total LF of staining and finishing trim, plus the resetting of trim exceeds the room's LF perimeter (PF) measurement.

  **Rule:** If the total LF sum of staining and finishing baseboard (PNT BS, PNT BS>) plus the LF of baseboard being detached and reset within a room (FNCB* R (Reset), or FNC BRS, or FNC BRS>) exceeds the perimeter of floor measurement of the room, or if the total LF sum of staining and finishing chair rail (PNT CHRS) plus the LF of chair rail detached and reset within a room (FNC CHR* R (Reset), or FNC CHRRS) exceeds the perimeter of floor measurement of the room, or if the total LF sum of staining and finishing crown molding (PNT CWNS) plus the LF of crown molding being detached and reset within a room (FNC CWN* R (Reset), or FNC CWNRS) exceed the perimeter of floor measurement of the room, then report. (This rule was added November 29, 2000. Any estimates that violate this rule will have been created since then.)

- **Reset Light Fixtures**
  
  **Goal:** Make us aware of any case where detaching and resetting a hanging or recessed light fixture and/or ceiling fan has been used in conjunction with painting of the ceiling.

  **Rule:** If detaching and resetting a ceiling mounted light fixture or ceiling fan (LIT AV* R (Reset) or LIT CHAN* R (Reset) or LIT CHANRS or LIT CHANCRS or LIT FN* R (Reset) or LIT FNRS or LIT HG* R (Reset) or LIT POR* R (Reset) or LIT PORRS or LIT RC* R (Reset) or LIT RCRRS or LIT RS or LIT RS> or LIT RS>> or LIT SPOT* R (Reset) appears in the same room with ceiling painting (PNT P, PNT P2, PNT SP, PNT SP2, PNT SP2+, PNT S, PNT S2, PNT S3, or PNT FAUX*) then report. (This rule was added November 29, 2000. Any estimates that violate this rule will have been created since then.)

- **Reset Sink & Hardware**
  
  **Goal:** Make us aware of any case where detaching and resetting a faucet and/or garbage disposer is used in the same room as detaching and resetting a sink (these processes should be combined as they take no additional effort).

  **Rule:** If detaching and resetting a faucet item or garbage disposer (PLM FAU* R (Reset), or PLM FAURS or APP GD* R (Reset) or APP GDRS) are used in the same room as resetting a sink (PLM SNK* R (Reset) or PLM SNKRS or PLM SNKDRS) then report. (This rule was added November 29, 2000. Any estimates that violate this rule will have been created since then.)

- **Reset Toilet & Seat**
  
  **Goal:** Make us aware of any case where detaching and resetting a toilet is used in the same room as detaching and resetting a toilet seat (resetting toilet seat takes no additional effort).

  **Rule:** If detaching and resetting a toilet (PLM TLT* R (Reset), or PLM TLTRS) are used in the same room as resetting a toilet seat (PLM TLTS* R (Reset) or PLM TLTSRS) then report. (This rule was added November 29, 2000. Any estimates that violate this rule will have been created since then.)

- **Roofing**
  
  **Goal:** Make us aware of any case where roof covering waste is included in the quantity of roof covering to be removed (waste material applies to replace/installation only).

  **Rule:** If the quantity of roofing removal equals or exceeds the quantity of roofing replacement [RFG 2*- (Remove) (except RFG 220E, 240E, 250 TLE, and 280E) plus RFG 3*- (Remove) (except RFG 300E) plus RFG 4*- (Remove) (except RFG 400E and 400IE) plus RFG 5*- (Remove) (except RFG 500E-, 500E, 500IE and 500SLE) exceeds or equals RFG 2*- (Replace) (except RFG 220E, 240E, 250 TLE and 280E) plus RFG 3*- (Replace) (except RFG 300E) plus RFG 4*- (Replace) (except RFG 400E and 400IE) plus RFG 5*- (Replace) (except RFG 500E-, 500E, 500IE and 500SLE); or if RFG WS*- (Remove) (except RFG WSHKE, WSHKE+, WSHKRE, WSHKRE+, WSTPE, and WSTPRE) exceeds or equals RFG WS*- (Replace) (except RFG WSHKE, WSHKE+, WSHKRE, WSHKRE+, WSTPE, and WSTPRE); or if RFG CSH- (Remove) plus RFG CSL- (Remove) plus RFG SLATE*- (Remove) plus
RFG STIL*- (Remove) plus RFG T*- (Remove) (except RFG TILE-, TILE, TILE+ and TILE++) exceeds or equals RFG CSH+ (Replace) plus RFG CSL+ (Replace) plus RFG SLATE**+ (Replace) plus RFG STIL**+ (Replace) plus RFG T**+ (Replace) (except RFG TILE-, TILE, TILE+ and TILE++); or if RFG 2*& (Remove and Replace) (except RFG 220E, 240E, 250 TLE, and 280E) or RFG 3*& (Remove and Replace) (except RFG 300E) or RFG 4*& (Remove and Replace) (except RFG 400 E and 400IE) or RFG 5*& (Remove and Replace) (except RFG 500E-, 500E, 500IE, and 500SLE) or RFG CSH& (Remove and Replace) or RFG CSL& (Remove and Replace) or RFG SLATE*& (Remove and Replace) or RFG TIL* (Remove and Replace) (except RFG TILE-, TILE, TILE+, and TILE++) or RFG WSHK (Remove and Replace) (except RFG WSHKE, WSHKE+, WSHKRE, WSHKRE+, WSTPE, and WSTPRE) exists], then report.

- **Roofing Felt Overlap**
  
  **Goal:** Make us aware of any case where roof covering is included and roofing felt is also included.
  
  **Rule:** If the following roofing codes exist with a separate entry for roofing felt (RFG 220, RFG 240, RFG 250TL, RFG 280, RFG 300, RFG 400, RFG 400I, RFG 500, RFG 500-, RFG 500SL, RFG 500I, RFG CSH, RFG CSL, RFG SLATE*, RFG TIL, RFG TIL+, RFG TIL++, RFG TIL-, RFG WSHK, RFG WSHK+, RFG WSHKR, RFG WSHKR+, RFG WSTP, or RFG WSTPR exist with RFG FELT*), then report.

- **Room Size**
  
  **Goal:** Make us aware of any case where it appears the user probably included an additional digit in a dimensioning field (e.g., 110' instead of 11').
  
  **Rule:** If there are any rooms in an estimate (excluding any rooms with the label of “attic,” “basement,” “exterior,” “general,” or “roof”) whose square footage of floor (F) is greater than 750 square feet, then report.
**ESTIMATE ITEMS BY QUALITY**
This report presents the percentage and number of estimate items (line items) broken down into the four category grades (low, average, high and premium) used in Xactimate.
ESTIMATE MINIMUM/BASE SERVICE CHARGE USAGE
This report presents the percentage and number of estimates that make up minimum percentage ranges (0%, 1–5%, 6–10%, 11–20%, 21–30%, 31–40%, and 41–100%). The minimum percentage range is the percent of the line item total dollar value represented by minimum adjustments.
**ESTIMATE NFCP USAGE REPORT**
The Estimate NFCP Usage report displays estimates containing flooring items broken out by estimates where a NFCP item was used or not used.

---

**NFCP USAGE**

**Safe Haven - All**

- NFCP Used
  - % of Estimates: 99.7%
  - Installed Value: $1,493,247
  - Material Value: $1,291,023
  - Total Value: $223,942

- NFCP Not Used
  - % of Estimates: 0.3%
  - Installed Value: $47,501
  - Material Value: $44,254
  - Total Value: $3,247

- Safe Haven
  - Installed Value: $13,402
  - Total Value: $1,540,486
  - Total Value: $1,242,282
  - Total Value: $1,038,666

**Table:**

<table>
<thead>
<tr>
<th>NFCP Used</th>
<th>Safe Haven</th>
</tr>
</thead>
<tbody>
<tr>
<td>525</td>
<td>602</td>
</tr>
</tbody>
</table>

**Note:** An estimate may be included in more than one category.
ESTIMATE OVERHEAD AND PROFIT
This report shows the percentage of estimates where overhead and profit were applied.

Graphical Management Reports

NOTE: This report only displays estimates with 80% or more of the line item values corresponding to the trade(s) chosen on the report selection page.

(Excel is a trademark of Microsoft Corporation)
ESTIMATE ROOFING USAGE
This report presents material quantities and line item totals for the nine different Roofing categories used in Xactimate: Built Up, Composite, Composition, Membrane, Metal, Slate, Tile, Wood and Miscellaneous.
**ESTIMATE SALVAGE RETAINED REPORT**
This report separates estimates containing salvage retained by the insured from salvage retained by a salvor.
**ESTIMATE SCOPING OVERLAP**

This report presents the percentage of possible quantity calculation errors by checking where the quantity specified for a line item exceeds the maximum or usual maximum quantity for such an item in the room.

You can drill-down to the line-item level of this report to see the actual line items that have violated this rule.
- **Base Trim**  
  **Goal:** Make us aware of any case where the lineal footage of base trim is greater than the total lineal footage of walls.
  
  **Rule:** If the lineal footage (LF) of base trim (FCW LAMB, FCV COVE*, FCV CB*, FNC B, FNC B+, FNC B3*, FNC B6*, FNC BC*, FNC BH*, FNC BP*, FNC B2M*, FNC B4*, and MBL B) is greater than the total lineal footage of walls as defined by the (PF) variable in a room, then report. (The “Baseboard Trim” rule was modified on November 29, 2000 to remove the “1x” dimensional lumber trims (i.e. 1x2, 1x4, etc.). This was done because many rooms use these types of moldings for trim other than baseboard. Any estimates that violate this rule will have been created prior to that time.

- **Bath Hardware**  
  **Goal:** Make us aware of any case where a bathroom accessories package was used as well as separate items normally included in the package.
  
  **Rule:** If bathroom accessories as a group (FNH BAC*) is found in the same room as bathroom accessories priced on a per item basis (FNH BRUSH, FNH ROBE, FNH SDISH, FNH TBAR*, FNH TP*, FNH WCH*, or FNH TR*), then report. (The “Hardware” rule was removed on November 29, 2000. Any estimates that violate this rule will have been created prior to that time.)

- **Cabinets**  
  **Goal:** Make us aware of any case where the total lineal measurement of wall and full height cabinets or the total lineal measurement of base and full height cabinets is greater than the lineal measurement of the walls in a room.
  
  **Rule:** If the total lineal footage (LF) of wall and full height cabinets (CAB UP* + CAB FFHC + CAB FU* + CAB FH*) or the total lineal footage (LF) of base and full height cabinets (CAB LOW* + CAB FL* + CAB VAN* + CAB FH* + CAB FFHC) is greater than the lineal footage of the walls (PF) in a room, then report.

- **Ceiling Tile**  
  **Goal:** Make us aware of any case where the total square footage of acoustic ceiling tile is greater than the square footage of the ceiling in a room.
  
  **Rule:** If the total square footage (SF) of acoustic ceiling tile (ACT AV* + ACT LP* + ACT ST- + ACT ST + ACT ST+ + ACT ST++ + ACT STRS + ACT STG* + ACT TIN* + DRY AC* or ACT FUR or ACT SG* + ACT STG*) is greater than the square footage of the ceiling (C) in a room, then report.

- **Chair Rail**  
  **Goal:** Make us aware of any case where the lineal footage of chair rail is greater than the total lineal footage of wall perimeter in a room.
  
  **Rule:** If the lineal footage (LF) of finish carpentry chair rail (FNC CHR*) is greater than the total lineal footage of walls (PF) in a room, then report.

- **Contents**  
  **Goal:** Make us aware of any case where more than 1 contents manipulation charge occurs in a room.
  
  **Rule:** If there is more than 1 contents manipulation charge (CON ROOM*) in a single room then report.

- **Crown Molding**  
  **Goal:** Make us aware of any case where the lineal footage of ceiling trim is greater than the total lineal footage of ceiling perimeter in a room.
  
  **Rule:** If the lineal footage (LF) of finish carpentry ceiling trim (FNC CWN*) is greater than the total lineal footage of ceiling (PC) in a room, then report.
**Door Hardware (Removal)**

**Goal:** Make us aware of any case where doors are listed for removal in the same room where door hardware (which should come off with the door without added effort) is also listed for removal.

**Rule:** If the removal of any door line item (DOR* - (Remove)) and the removal of any finish hardware line item for doors (FNH CDB* (Remove), FNH D* - (Remove) or FNH HOLD* - (Remove) or FNH KICK* - (Remove) or FNH KNOCK* - (Remove) or FNH LOK* (Remove), FNH PEEP* - (Remove) or FNH PH* - (Remove) or FNH PU* - (Remove)) is found in the same room, then report.

**Drywall Patch (Est.)**

**Goal:** Drywall patch is generally used within a room to designate minimal drywall work not worthy of detailing within multiple line items. Estimators should generally choose between the use of patch or the use of detailed line items rather than using a mixture. A mixture often indicates an incorrect scoping technique. Therefore, we need to be aware of instances where drywall or plaster square footage replacement line items are found in an estimate with drywall patch.

**Rule:** If drywall or plaster square footage (SF) replacement (DRY* or PLA*) is found in an estimate with drywall patch (DRY PATCH), then report. (The “Drywall Patch per Estimate” rule was removed on December 19, 2002. Any estimates that violate this rule will have been created prior to that time.)

**Drywall Patch (Room)**

**Goal:** Drywall patch is generally used within a room to designate minimal drywall work not worthy of detailing within multiple line items which can be done without bringing a drywall crew to the job. A high patch charge probably indicates improper usage of the patch line item (should use standard drywall line items for larger repairs). Therefore we need to be aware of instances where more than one drywall patch is included in a room or if a single drywall patch line item exceeds the drywall minimum.

**Rule:** If more than one drywall patch (DRY PATCH) line item is included in a room or if a single drywall patch (DRY PATCH) line item exceeds the drywall minimum, then report. (The “Drywall Patch per Room” rule was removed on November 29, 2000. Any estimates that violate this rule will have been created prior to that time.)

**Drywall/Plaster**

**Goal:** Make us aware of any case where the total square footage of finished drywall, drywall texture, and/or plaster is greater than the square footage of the walls and ceilings in a room.

**Rule:** If the total square footage (SF) of drywall and/or plaster (DRY ½, DRY ½+, DRY ½++, DRY ½OP, DRY 1/4*, DRY 5/8, DRY 5/8+, DRY 5/8++, DRY 5/8C, DRY TEX*, PLA 2, PLA APG, PLA APM, PLA G2, PLA M2, PLA M3, PLA THIN, and PLA THING) is greater than the square footage of the walls and ceilings (WC) in a room, then report.

**Duplicate Minimums**

**Goal:** Make us aware of any case where multiple “Minimum Charge” items that use the same labor code exist in the estimate.

**Rule:** If more than one minimum charge * *MN exists in the estimate with the same labor code, then report. (This rule was added December 19, 2002. Any estimates that violate this rule will have been created since then.)

**Exterior Lockset and Deadbolt**

**Goal:** Make us aware of any case where an “exterior lockset” or “deadbolt” and an “exterior lockset with deadbolt” are present in this room. These items should not exist in the same room.

**Rule:** If (FNH DORHX*, FNH DB-, FNH DB, FNH DB+, or FNH DB++, FNH DBRS) exist in the same room as FNH DBX*, then report. (This rule was added December 19, 2002. Any estimates that violate this rule will have been created since then.)
**Flooring**

**Goal #1:** Make us aware of any case where the total square footage of vinyl tile, stone, ceramic, or slate tile, and wood flooring in a room is greater than the square footage of flooring. These items are estimated, and sold on a square foot basis, and include waste within the line item price.

**Goal #2:** Make us aware of any case where the total square footage of carpet, pad, and/or vinyl sheet goods found in a room is greater than the total square footage of floor area * 1.15 (15% greater than room size). The industry standard for estimating with flooring which is purchased off a "roll" is to account for waste by increasing the quantity of the item. The percentage of increased quantity should vary depending on room size, shape, and complexity of any patterns in the flooring. And while in some cases needs to exceed 15%, this is just a general guideline.

**Goal #3:** Make us aware of any case where the waste for sheet good items (carpet and vinyl) exceeds 15% in rooms where a combination of sheet good and square foot flooring items are used.

**Rule:** If the total square footage (SF) of vinyl tile, plus stone tile, plus ceramic tile, plus slate tile, plus wood flooring (FCR TA*, FCR TFU, FCR TRU, FCR TV*, FCV RT*, FCV V*, FCS AV*, FCS MBL* (except FCS MBLP), FCS SLATE*, FCS TZ* (except FCS TZBRASS and FCS TZCLR), FCT AV*, FCT QT*, FCT TRAV, FCW AV*, FCW FIR*, FCW FS, FCW LAM*, FCW M* (except FCW MASKSF), FCW OPL, FCW PQ*, FCW SOFT*, and FCW WPQ*) in a room is greater than the square footage (F) of flooring, then report.

or if the total square footage (SF) of carpet, plus vinyl sheet goods (FCC AV* (except FCC AVB), FCC CP*, FCC GD*, FCC I/O*, FCC LAY*, FCC LP*, FCC WOOL*, and FCV AV*) in a room is greater than the square footage (SF) of floor area * 1.15 then report.

or if the total square footage of (SF) vinyl tile, plus stone tile, plus ceramic tile, plus slate tile, plus wood flooring (FCR TA*, FCR TFU, FCR TRU, FCR TV*, FCV RT*, FCV V*, FCS AV*, FCS MBL* (except FCS MBLP), FCS SLATE*, FCS TZ* (except FCS TZBRASS and FCS TZCLR), FCT AV*, FCT QT*, FCT TRAV, FCW AV*, FCW FIR*, FCW FS, FCW LAM*, FCW M* (except FCW MASKSF), FCW OPL, FCW PQ*, FCW SOFT*, FCW WPQ*) plus carpet, plus vinyl sheet goods (FCC AV* (except FCC AVB), FCC CP*, FCC GD*, FCC I/O*, FCC LAY*, FCC LP*, FCC WOOL*, FCV AV*) is greater than the area of the room plus the square footage of all carpet and vinyl sheet items*.15 then report. (This rule was added December 19, 2002. Any estimates that violate this rule will have been created since then.)

**Seal & Paint**

**Goal:** Make us aware of any case where the total square footage of separate seal and paint line items combined with line items containing both seal and paint exceeds the area of the walls and ceilings in the room.

**Rule:** If (PNT P, PNT P2, PNT S, PNT S+, PNT S2, or PNT S3) exist in the same room as (PNT SP, PNT SP2, or PNT SP2+) and the total square footage is more than WC, then report. (This rule was added December 19, 2002. Any estimates that violate this rule will have been created since then.)

**Top Rail**

**Goal:** Make us aware of any case where the amount of chain link fence top rail exactly matches the amount of chain link fence since chain link fencing already includes top rail.

**Rule:** If chain link top rail (FEN CLTOPR) appears in the same room as chain link fencing (FEN CL3, FEN CL4, FEN CL5, FEN CL6, FEN CL7) or vinyl coated chain link fence (FEN CLV*) and the total lineal footage (of FEN CLTOPR) is the same as the total lineal footage of the fencing items, then report.
Graphical Management Reports

- **Underlayment**
  **Goal:** Make us aware of any case where the total square footage of underlayment is greater than the square footage of floors in a room.
  **Rule:** If the total square footage (SF) of flooring underlayment (FCV UL* and/or FRM UL*) is greater than the square footage of floors (F) in a room, then report.

- **Wall Covering**
  **Goal:** Make us aware of any case where the total square footage of wall coverings such as wallpaper, paneling, wall tile, and painting is greater than the square footage of the walls and ceilings in a room.
  **Rule:** If the total square footage (SF) of wallpaper, paneling, wall tile, and painting (WPR AV*, WPR FOIL*, WPR GRASS*, PNL AV*, PNL BAB, PNL BOB, PNL CORK*, PNL FORM*, PNL TG*, PNL WP*, TIL AV*, TIL GROUT, TIL PL, PNT AC, PNT ACT, PNT CNC, PNT P, PNT P2, PNT S2, PNT S3, PNT SG, PNT SH, PNT SDG, PNT SP, PNT SP2*, PNT STU, PNT TEX, PNT WPR, PNT X1, PNT X2, PNT XS, PNT XSP, PNT XSP2, WPR PREP, WPR V*, PNL CLOS*, PNL CHEV, PNL DIAG, PNL HBONE, PNL PEG, PNT BRK, PNT FAUX*, PNT FW*, (remove) PNT MAS*, PNT MTL, PNT XSTN, PNT XSTN2, TIL BCEM1/2, TIL BCEM1/4 or TIL BMUD) is greater than the square footage of the walls and ceilings (WC) in a room, then report.

- **Wall Covering Removal**
  **Goal:** Make us aware of any case where the quantity for the additional charge to remove non-strippable wallpaper exceeds the quantity of wallpaper being removed.
  **Rule:** If the quantity for the additional charge to remove non-strippable wallpaper WPR RMV- (Remove) exceeds the quantity of wallpaper being removed WPR AV* (except WPR AVRL*) - (Remove), WPR FOIL*- (Remove) or WPR GRASS*- (Remove) or WPR V*- (Remove) then report. (Split the Wall Covering rule into two rules. This one does not contain the check for wall covering quantities being larger than the SF of wall and ceiling, as of 31-March-2006.)
ESTIMATE SIDING USAGE
This report presents material quantities and line item totals for the four different Siding categories used in Xactimate: Metal, Vinyl, Wood and Miscellaneous.
**ESTIMATE TAX USAGE**

This report presents the percentage and number of estimates receiving no tax, material sales tax, equipment tax, labor tax, flat tax, other tax and any combination of these taxes.
ESTIMATE TYPE OF LOSS
This report presents the percentage, dollar value, and number breakdown of estimates by type of loss.
**ESTIMATE/PRICE LIST DIFFERENCES**

This report presents the percentage and/or number of line items changed in an estimate. It reviews change in unit of measure, description, price and all combinations of these changes (including no change).
**LABOR EFFICIENCY USAGE**

This report allows you to track the labor efficiency type being used in completed estimates (Factored In, Broken Out, New Construction, No Labor Efficiency, and Restoration/Remodel).

![Graphical Management Reports](image)

**NOTE:** U.S. estimates are in U.S. Dollars, Canadian estimates are in Canadian Dollars.

*No Labor Efficiencies* estimates were created in previous Xactimate versions prior to Labor Efficiency usage.
Graphical Management Reports

**PERCENTAGE BREAKDOWN OF ESTIMATE BY TRADE**

This report presents the percentage each trade contributes to the total estimate dollar value.
**SALVAGEABLE FLOORING**

This report presents the percentage of floor coverings that were salvaged based on the amount of time that it took to receive the job. The salvage percentage is calculated by taking the SF difference between extraction and removal items and dividing the difference by the total amount of removal.

### SAFE HAVEN
- Alaska
- Canada
- Central Pacific
- Central Plains
- Eastern
- Florida
- Great Lakes
- Hawaii
- Mid Atlantic
- Mid South
- New England
- North Atlantic
- Northern California
- Northern Plains
- Northwest
- Rocky Mountain
- Southeast
- Southern California
- Southern Plains
- Southwest
- Unknown

---

**Percentage of Flooring Salvaged**

<table>
<thead>
<tr>
<th>Days</th>
<th>Estimates</th>
<th>Estimate Value</th>
<th>SF Removal</th>
<th>SF Removal</th>
<th>SF Extraction</th>
<th>SF Salvaged</th>
<th>% SF Salvaged</th>
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</thead>
<tbody>
<tr>
<td>0-1 Days</td>
<td>628</td>
<td>$1,500,218</td>
<td>114,204.3</td>
<td>$73,190</td>
<td>219,109.9</td>
<td>$111,143</td>
<td>149,661.2</td>
</tr>
<tr>
<td>1-2 Days</td>
<td>467</td>
<td>$1,190,855</td>
<td>161,044.8</td>
<td>$62,190</td>
<td>121,441.1</td>
<td>$62,790</td>
<td>70,481.1</td>
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<tr>
<td>2-3 Days</td>
<td>231</td>
<td>$533,327</td>
<td>48,211</td>
<td>$31,136</td>
<td>41,364</td>
<td>$24,112</td>
<td>23,066.5</td>
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<tr>
<td>3-4 Days</td>
<td>142</td>
<td>$302,265</td>
<td>27,476.4</td>
<td>$19,241</td>
<td>23,281.2</td>
<td>$13,063</td>
<td>14,386.7</td>
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<tr>
<td>4-5 Days</td>
<td>60</td>
<td>$113,835</td>
<td>9,644.3</td>
<td>$6,841</td>
<td>14,311.6</td>
<td>$7,056</td>
<td>11,710.8</td>
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<tr>
<td>5+ Days</td>
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<td>$588,741</td>
<td>57,019.1</td>
<td>$33,503</td>
<td>59,769.4</td>
<td>$34,048</td>
<td>34,295.6</td>
</tr>
</tbody>
</table>

**Safe Haven**

- 1,750 | $4,389,218 | 354,700 | $226,220 | 479,197.1 | $252,202 | 384,383.0 | 76.1% |

**NOTE:** All amounts are in U.S. Dollars. ©Copyright 2001-2006 Xactware, Inc. All Rights Reserved.

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**TOP 20 MATERIAL CATEGORIES**

This report presents the 20 price list categories that contain the highest dollar value of materials, as well as links to the material components and their values in each category.

The top 20 categories are established at the hierarchy level the report is run for, but lower hierarchy levels may have material values that could vary from these 20 categories, so fewer categories may be displayed.
**TEXT MANAGEMENT REPORTS**

**AVERAGE VALUE**

This report presents estimate value, average estimate value, and quantity breakdown of estimates by the various levels of hierarchy.

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Estimates</th>
<th>Average Estimate Value</th>
<th>Total Estimate Value</th>
<th>% of Total Estimates</th>
<th>% of Total Estimate Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
<td>3,462</td>
<td>$6,600</td>
<td>$19,308,594</td>
<td>3.7%</td>
<td>2.3%</td>
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<tr>
<td>Canada</td>
<td>429</td>
<td>$5,784</td>
<td>$2,472,751</td>
<td>0.5%</td>
<td>0.3%</td>
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<tr>
<td>Florida</td>
<td>29,616</td>
<td>$7,084</td>
<td>$233,472,533</td>
<td>32.0%</td>
<td>28.0%</td>
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<tr>
<td>Great Lakes</td>
<td>6,084</td>
<td>$33,124</td>
<td>$140,919,546</td>
<td>16.6%</td>
<td>13.0%</td>
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<tr>
<td>Hawaii</td>
<td>12,010</td>
<td>$6,311</td>
<td>$75,790,054</td>
<td>10.0%</td>
<td>9.1%</td>
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<tr>
<td>Mid Atlantic</td>
<td>2,830</td>
<td>$6,049</td>
<td>$17,120,045</td>
<td>2.0%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Mid South</td>
<td>5,974</td>
<td>$11,291</td>
<td>$67,449,701</td>
<td>6.2%</td>
<td>6.1%</td>
</tr>
<tr>
<td>New England</td>
<td>6,256</td>
<td>$6,784</td>
<td>$45,952,749</td>
<td>6.3%</td>
<td>6.6%</td>
</tr>
<tr>
<td>North Atlantic</td>
<td>2,891</td>
<td>$6,527</td>
<td>$18,003,806</td>
<td>2.2%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Northern Plains</td>
<td>3,766</td>
<td>$7,250</td>
<td>$27,371,267</td>
<td>3.6%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Northwest</td>
<td>1,417</td>
<td>$6,451</td>
<td>$12,031,040</td>
<td>1.6%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Rocky Mountain</td>
<td>6,247</td>
<td>$10,631</td>
<td>$67,072,457</td>
<td>9.2%</td>
<td>10.5%</td>
</tr>
<tr>
<td>Southeast</td>
<td>9,287</td>
<td>$7,001</td>
<td>$63,267,019</td>
<td>8.3%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Southwest</td>
<td>4,712</td>
<td>$8,969</td>
<td>$42,459,267</td>
<td>6.0%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Safe Haven</td>
<td>92,700</td>
<td>$8,509</td>
<td>$803,238,329</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

**NOTE:** U.S. estimates are in U.S. Dollars, Canadian estimates are in Canadian Dollars.

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(Xact is a trademark of Microsoft Corporation.)
## CONTENTS COST COMPARISON REPORT
This report displays a comparison between the reported costs (as reported by the insured) and the replacement costs (as made by the adjuster in the estimate).

![XactAnalysis User's Guide](image)

### CONTENTS COST COMPARISON
Staff - All Trades  
CAT and Non-CAT Data  
All Dollar Estimates Included  
Company Wide  
91 Jan-2009 to 12-Aug-2009  
Both Residential & Commercial Shown  
Using Business Days  
All Value Ranges Shown  
All Coverage Types Shown

![Report View](image)

### Rocky Mountain

<table>
<thead>
<tr>
<th>Department</th>
<th>Group</th>
<th>Type</th>
<th>Total Estimates</th>
<th>Average Estimate Value</th>
<th>Total Reported Cost</th>
<th>Total Estimated Cost</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cameras, Camcorders &amp; Equipment</td>
<td>Camcorder - Digital</td>
<td>Flash Memory - Memory Card / Stick</td>
<td>10</td>
<td>$16,254</td>
<td>$3,312</td>
<td>$2,590</td>
<td>$622</td>
</tr>
<tr>
<td></td>
<td>Camera - Digital</td>
<td>DSLR Body &amp; Lens Digital Camera</td>
<td>14</td>
<td>$19,889</td>
<td>$1,542</td>
<td>$1,465</td>
<td>$177</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Digital Camera - Point and Shoot</td>
<td>12</td>
<td>$16,730</td>
<td>$6,120</td>
<td>$3,214</td>
<td>$1,906</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Digital Camera – SLR Body &amp; Lens</td>
<td>7</td>
<td>$12,662</td>
<td>$1,021</td>
<td>$1,241</td>
<td>-$220</td>
</tr>
<tr>
<td></td>
<td>Memory Card &amp; Accessories</td>
<td>Memory Card - 3 GB or Smaller</td>
<td>8</td>
<td>$10,554</td>
<td>$240</td>
<td>$261</td>
<td>$39</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Memory Card - 4 to 6 GB</td>
<td>13</td>
<td>$9,554</td>
<td>$3310</td>
<td>$197</td>
<td>$13</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>64</td>
<td>$78,433</td>
<td>$11,545</td>
<td>$8,908</td>
<td>$2,537</td>
</tr>
</tbody>
</table>

Report Created 12-Aug-2009 05:46 PM
### CONTRACTOR/CLAIM REP UTILIZATION

This report presents estimate information (number of estimates, estimate value, average estimate value) for contractors at the various levels of hierarchy plus claim rep., and contractor levels. This report shows which contractors each claim rep. used.

#### Safe Haven

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Estimates</th>
<th>Average Estimate Value</th>
<th>Total Estimate Value</th>
<th>% of Total Estimates</th>
<th>% of Total Estimate Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contents</td>
<td>14</td>
<td>$2,747</td>
<td>$38,401</td>
<td>14.4%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Structural</td>
<td>13</td>
<td>$6,274</td>
<td>$60,760</td>
<td>95.6%</td>
<td>93.1%</td>
</tr>
<tr>
<td>Canada</td>
<td>97</td>
<td>$5,765</td>
<td>$559,209</td>
<td>15.0%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Central Pacific</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contents</td>
<td>4</td>
<td>$2,203</td>
<td>$9,811</td>
<td>23.5%</td>
<td>10.0%</td>
</tr>
<tr>
<td>Structural</td>
<td>13</td>
<td>$6,101</td>
<td>$79,312</td>
<td>76.5%</td>
<td>90.0%</td>
</tr>
<tr>
<td>Central Pacific</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contents</td>
<td>2</td>
<td>$2,722</td>
<td>$1,440</td>
<td>9.5%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Structural</td>
<td>19</td>
<td>$1,517</td>
<td>$142,830</td>
<td>90.5%</td>
<td>99.0%</td>
</tr>
<tr>
<td>Central Plains</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contents</td>
<td>21</td>
<td>$6,870</td>
<td>$144,279</td>
<td>3.4%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Structural</td>
<td>30</td>
<td>$5,884</td>
<td>$129,571</td>
<td>91.8%</td>
<td>92.6%</td>
</tr>
<tr>
<td>Eastern</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contents</td>
<td>23</td>
<td>$5,708</td>
<td>$133,115</td>
<td>3.8%</td>
<td>3.7%</td>
</tr>
</tbody>
</table>

Report Created 01/20/2006 02:19 pm MT
ESTIMATE AUDIT RESULTS
This report presents the audit results derived from Inspection Audit promptings in the estimate. Information in this report includes estimate count, estimate value, estimates where an inspection was run, estimates with findings, estimates with results, total estimate results and average estimate results.

<table>
<thead>
<tr>
<th>Safe Haven</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region</td>
<td>Total Estimates</td>
</tr>
<tr>
<td>Alaska</td>
<td>17</td>
</tr>
<tr>
<td>Canada</td>
<td>477</td>
</tr>
<tr>
<td>Central Pacific</td>
<td>541</td>
</tr>
<tr>
<td>Central Plains</td>
<td>501</td>
</tr>
<tr>
<td>Eastern</td>
<td>6</td>
</tr>
<tr>
<td>Florida</td>
<td>443</td>
</tr>
<tr>
<td>Georgia</td>
<td>59</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>180</td>
</tr>
<tr>
<td>Hawaii</td>
<td>301</td>
</tr>
<tr>
<td>Mid Atlantic</td>
<td>136</td>
</tr>
<tr>
<td>Mid South</td>
<td>959</td>
</tr>
<tr>
<td>New England</td>
<td>73</td>
</tr>
<tr>
<td>North Atlantic</td>
<td>42</td>
</tr>
<tr>
<td>Rocky Mountain</td>
<td>12</td>
</tr>
</tbody>
</table>

Safe Haven | 3,503 | 3,503 | 707 | 20.0% | 33 | 0.9% | $7,204,078 | $109,655 | $5,986 | $101 |

NOTE: All amounts are in U.S. Dollars.

XactAnalysis User’s Guide
Page 248
When you drill down to the estimate detail, you can view the Audit report.
## ESTIMATE BREAKDOWN BY NFCP REASONS REPORT

The Estimate Breakdown by NFCP Reasons report shows a breakdown of estimates containing flooring items and the reason an NFCP item was not used.

<table>
<thead>
<tr>
<th>Flooring Type</th>
<th>Reason NFCP not used</th>
<th>Total Estimates</th>
<th>Total Estimate Value</th>
<th>Average Estimate Value</th>
<th>% of Total Reason Value</th>
<th>Total Flooring Item Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carpet</td>
<td>Sample unable to be priced</td>
<td>20</td>
<td>$35,015</td>
<td>$1,801</td>
<td>39.2%</td>
<td>$72,011</td>
</tr>
<tr>
<td></td>
<td>ITEL doesn’t test material type</td>
<td>11</td>
<td>$25,884</td>
<td>$2,312</td>
<td>23.1%</td>
<td>$60,013</td>
</tr>
<tr>
<td></td>
<td>Flooring surface too small</td>
<td>7</td>
<td>$4,694</td>
<td>$2,246</td>
<td>13.7%</td>
<td>$5,267</td>
</tr>
<tr>
<td></td>
<td>Material removed - no sample saved</td>
<td>5</td>
<td>$10,344</td>
<td>$2,071</td>
<td>5.9%</td>
<td>$52,564</td>
</tr>
<tr>
<td></td>
<td>ITEL waived per management</td>
<td>5</td>
<td>$22,062</td>
<td>$4,463</td>
<td>9.8%</td>
<td>$22,037</td>
</tr>
<tr>
<td></td>
<td>Insured refuses to allow sample cut</td>
<td>2</td>
<td>$1,074</td>
<td>$1,074</td>
<td>3.1%</td>
<td>$1,074</td>
</tr>
<tr>
<td></td>
<td>All material contaminated - unable to sample</td>
<td>1</td>
<td>$0</td>
<td>$0</td>
<td>2.0%</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>All material contaminated - not installed</td>
<td>0</td>
<td>$15,085</td>
<td>$3,169</td>
<td>0.9%</td>
<td>$11,084</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carpet</td>
<td></td>
<td>51</td>
<td>$128,743</td>
<td>$18,724</td>
<td>100.0%</td>
<td>$96,557</td>
</tr>
<tr>
<td>Vinyl</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Flooring surface too small</td>
<td>19</td>
<td>$10,298</td>
<td>$2,566</td>
<td>54.3%</td>
<td>$7,564</td>
</tr>
<tr>
<td></td>
<td>ITEL doesn’t test material type</td>
<td>7</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Sample unable to be priced</td>
<td>4</td>
<td>$0</td>
<td>$0</td>
<td>11.4%</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Material removed - no sample saved</td>
<td>2</td>
<td>$79,000</td>
<td>$3,950</td>
<td>57.3%</td>
<td>$59,000</td>
</tr>
<tr>
<td></td>
<td>All material contaminated - unable to sample</td>
<td>2</td>
<td>$4,215</td>
<td>$2,108</td>
<td>5.7%</td>
<td>$4,163</td>
</tr>
<tr>
<td></td>
<td>ITEL waived per management</td>
<td>1</td>
<td>$18,000</td>
<td>$2,000</td>
<td>2.0%</td>
<td>$17,998</td>
</tr>
<tr>
<td></td>
<td>Insured refuses to allow sample cut</td>
<td>0</td>
<td>$3,590</td>
<td>$1,894</td>
<td>0.0%</td>
<td>$2,774</td>
</tr>
<tr>
<td></td>
<td>All material contaminated - not installed</td>
<td>0</td>
<td>$36,123</td>
<td>$3,612</td>
<td>0.0%</td>
<td>$27,922</td>
</tr>
</tbody>
</table>
ESTIMATE BREAKDOWN BY TRADE
This report presents the percentage of total trade dollar value (excluding O&P and tax) attributed to each trade for the various levels of hierarchy.

<table>
<thead>
<tr>
<th>Rocky Mountain</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Location</td>
<td>Trade</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Boulder Area</td>
<td></td>
</tr>
<tr>
<td>CARP-FNC</td>
<td>367</td>
</tr>
<tr>
<td>CARP-FRM</td>
<td>190</td>
</tr>
<tr>
<td>CARP-NECH</td>
<td>106</td>
</tr>
<tr>
<td>CLN</td>
<td>231</td>
</tr>
<tr>
<td>CLN-F</td>
<td>10</td>
</tr>
<tr>
<td>CNC</td>
<td>759</td>
</tr>
<tr>
<td>DMO</td>
<td>348</td>
</tr>
<tr>
<td>DRY</td>
<td>191</td>
</tr>
<tr>
<td>ELE</td>
<td>2</td>
</tr>
<tr>
<td>EGU</td>
<td>103</td>
</tr>
<tr>
<td>FLR</td>
<td>114</td>
</tr>
<tr>
<td>HDW</td>
<td>145</td>
</tr>
<tr>
<td>HVC</td>
<td>443</td>
</tr>
</tbody>
</table>

Boulder Area Total

<table>
<thead>
<tr>
<th>Program Location</th>
<th>Trade</th>
<th>Total Estimates</th>
<th>Total Trade Value</th>
<th>% of Total Trade Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARP-FNC</td>
<td>367</td>
<td>$355,173</td>
<td>6.0%</td>
<td></td>
</tr>
<tr>
<td>CARP-FRM</td>
<td>190</td>
<td>$288,954</td>
<td>4.9%</td>
<td></td>
</tr>
<tr>
<td>CARP-NECH</td>
<td>106</td>
<td>$301,535</td>
<td>1.4%</td>
<td></td>
</tr>
<tr>
<td>CLN</td>
<td>231</td>
<td>$344,289</td>
<td>5.0%</td>
<td></td>
</tr>
<tr>
<td>CLN-F</td>
<td>10</td>
<td>$11,443</td>
<td>0.2%</td>
<td></td>
</tr>
<tr>
<td>CNC</td>
<td>759</td>
<td>$402,320</td>
<td>7.0%</td>
<td></td>
</tr>
<tr>
<td>DMO</td>
<td>348</td>
<td>$398,724</td>
<td>6.0%</td>
<td></td>
</tr>
<tr>
<td>DRY</td>
<td>191</td>
<td>$305,366</td>
<td>1.4%</td>
<td></td>
</tr>
<tr>
<td>ELE</td>
<td>2</td>
<td>$1,653</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td>EGU</td>
<td>103</td>
<td>$23,851</td>
<td>0.4%</td>
<td></td>
</tr>
<tr>
<td>FLR</td>
<td>114</td>
<td>$50,600</td>
<td>0.9%</td>
<td></td>
</tr>
<tr>
<td>HDW</td>
<td>145</td>
<td>$49,200</td>
<td>0.9%</td>
<td></td>
</tr>
<tr>
<td>HVC</td>
<td>443</td>
<td>$30,745</td>
<td>1.7%</td>
<td></td>
</tr>
</tbody>
</table>
ESTIMATE BREAKDOWN BY TYPE
This report allows you to see a breakdown of estimates containing contents items broken out by department, group, and type. By clicking on a particular type, you can drill down through the hierarchy to view estimates containing items of that type.

<table>
<thead>
<tr>
<th>Safe Haven</th>
<th>Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Group</td>
</tr>
<tr>
<td>Appliances - Major</td>
<td>Refrigerators</td>
</tr>
<tr>
<td></td>
<td>Bottom-mount 25 to 30 cf</td>
</tr>
<tr>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>Clothing, Luggage &amp; Accessories</td>
<td>Ladieswear &amp; Accessories</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>Electronics</td>
<td>DVD, VCR, &amp; DVR</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>Firearms</td>
<td>Muzzleloaders</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>Safe Haven</td>
<td></td>
</tr>
</tbody>
</table>

ESTIMATE SALVAGE RECOVERY BY ADJUSTER REPORT
This report shows the total salvage retained by both the insured and salvor, indemnity cost, and the percent value recovered by salvage. This report is based on the adjuster that uploaded the estimate.

<table>
<thead>
<tr>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Mike Fowler (FLOWER, CREM.UNIT)</td>
</tr>
<tr>
<td>AP Construction (ACB, CREM.UNIT)</td>
</tr>
<tr>
<td>Totals for Safe Haven</td>
</tr>
</tbody>
</table>
**ESTIMATE SALVAGE RECOVERY BY DEPARTMENT REPORT**
This report shows the total salvage, broken down by department, retained by both the insured and salvor. It has columns for indemnity cost, and the percent value recovered by salvage.

<table>
<thead>
<tr>
<th>Department</th>
<th>Group</th>
<th>Type</th>
<th>Total Claim Value</th>
<th>Total Salvage Retained by Insured</th>
<th>Total Salvage Recovered by Salvor</th>
<th>Total Indemnity Cost</th>
<th>% Value Recovered by Salvage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronics</td>
<td>Televisions</td>
<td>Plasma TV 37-42”</td>
<td>$28,823</td>
<td>$525</td>
<td>$0</td>
<td>$28,299</td>
<td>0.0%</td>
</tr>
<tr>
<td>Jewelry, Watches</td>
<td>Watches</td>
<td>Mens Digital</td>
<td>$28,823</td>
<td>$100</td>
<td>$0</td>
<td>$28,723</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>Totals for Safe Haven</strong></td>
<td></td>
<td></td>
<td><strong>$57,647</strong></td>
<td><strong>$625</strong></td>
<td><strong>$0</strong></td>
<td><strong>$57,022</strong></td>
<td><strong>0.0%</strong></td>
</tr>
</tbody>
</table>

**ESTIMATES WITH SKETCHES AND PHOTOS**
This report shows the number of estimates that have been uploaded with and without sketches and photos.
**FREQUENTLY USED ITEMS**

This report displays the 100 price list items that are used most frequently in your returned estimates. The list is sorted with the most frequently used item in all your estimates at the top of the list.

### Safe Haven

<table>
<thead>
<tr>
<th>Category Code</th>
<th>Selector Code</th>
<th>Description</th>
<th>Item Count</th>
<th>Total Item Value</th>
<th>Total Estimates Value</th>
<th>Avg Item Value per Estimate</th>
<th>Avg Estimate Value</th>
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</thead>
<tbody>
<tr>
<td>CON (CONTENT MANIPULATION)</td>
<td>LAB</td>
<td>Content Manipulation charge - per hour</td>
<td>280,076</td>
<td>$3,886,958</td>
<td>$2,996,730,068</td>
<td>$132</td>
<td>$11,725</td>
</tr>
<tr>
<td>PNT (PAINTING)</td>
<td>S</td>
<td>Seal/prime (V) - one coat</td>
<td>234,688</td>
<td>$1,029,930</td>
<td>$696,639,451</td>
<td>$136</td>
<td>$17,385</td>
</tr>
<tr>
<td>PNT (PAINTING)</td>
<td>P</td>
<td>Paint (V) - one coat</td>
<td>234,688</td>
<td>$1,029,930</td>
<td>$696,639,451</td>
<td>$136</td>
<td>$17,385</td>
</tr>
<tr>
<td>FOC FLOOR COVERING - CARPET</td>
<td>AV</td>
<td>Carpet</td>
<td>216,831</td>
<td>$714,560,744</td>
<td>$2,716,161,346</td>
<td>$1,319</td>
<td>$20,888</td>
</tr>
<tr>
<td>DMO (GENERAL) DEMOLITION</td>
<td>DU</td>
<td>Haul debris - per pickup truck load - including dump fees</td>
<td>197,729</td>
<td>$197,004</td>
<td>$1,119,719,597</td>
<td>$118</td>
<td>$6,636</td>
</tr>
<tr>
<td>REV (DEWALL)</td>
<td>1/2</td>
<td>1/2&quot; drywall - Hung, taped, finished, ready for paint</td>
<td>195,327</td>
<td>$116,210,872</td>
<td>$1,024,034,003</td>
<td>$865</td>
<td>$20,890</td>
</tr>
<tr>
<td>WTR WATER EXTRACT &amp; REMOVAL</td>
<td>GRM</td>
<td>Apply anti-microbial agent</td>
<td>172,622</td>
<td>$169,969</td>
<td>$1,931,000,552</td>
<td>$159</td>
<td>$10,859</td>
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<tr>
<td>FOC FLOOR COVERING - CARPET</td>
<td>PHD</td>
<td>Carpet pad</td>
<td>170,823</td>
<td>$333,525,306</td>
<td>$3,030,190,165</td>
<td>$223</td>
<td>$21,018</td>
</tr>
<tr>
<td>REV (DEWALL)</td>
<td>AC</td>
<td>Acoustic ceiling (popcorn) texture</td>
<td>162,682</td>
<td>112,475</td>
<td>$874,544,370</td>
<td>$655</td>
<td>$10,763</td>
</tr>
<tr>
<td>RFO ROOFING</td>
<td>240</td>
<td>3 tab - 25 yr. - composition shingle roofing - incl. felt</td>
<td>157,327</td>
<td>$334,656,553</td>
<td>$1,841,542,682</td>
<td>$2,785</td>
<td>$16,388</td>
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<tr>
<td>RFO ROOFING</td>
<td>220</td>
<td>3 tab - 20 yr. - composition shingle roofing - incl. felt</td>
<td>145,782</td>
<td>95,021</td>
<td>$230,848,907</td>
<td>$699,535,056</td>
<td>$4,784</td>
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<tr>
<td>SFG (SOFFIT, FASCIA, &amp; EAVES)</td>
<td>GUTA</td>
<td>Gutter / downspout - aluminum</td>
<td>143,514</td>
<td>132,567</td>
<td>$867,177,796</td>
<td>$2,779,590,242</td>
<td>$680</td>
</tr>
<tr>
<td>PNT (PAINTING)</td>
<td>SP</td>
<td>Seal then paint (V) (2 coats)</td>
<td>124,568</td>
<td>121,791</td>
<td>$80,379,449</td>
<td>$3,929,983,508</td>
<td>$660</td>
</tr>
</tbody>
</table>

Report Created: 05/05/2008 08:50 PM MST
## INITIAL RESPONSE TIME

This report differentiates between assignments with multiple recipients and with one recipient. This provides more detail if the assignment was re-assigned multiple times prior to having any information uploaded to XactAnalysis.

### Table: INITIAL RESPONSE TIME

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Issues</th>
<th>Avg Days until Contacted</th>
<th>Avg Days until Inspected</th>
<th>Avg Days from Contacted to Inspected</th>
<th>Avg Days until Returned</th>
<th>Avg Days from Inspected to Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
<td>3,254</td>
<td>0.8</td>
<td>1.1</td>
<td>3.1</td>
<td>4.7</td>
<td>11.5</td>
</tr>
<tr>
<td>Canada</td>
<td>487</td>
<td>1.1</td>
<td>1.5</td>
<td>2.3</td>
<td>8.1</td>
<td>20.8</td>
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<tr>
<td>Florida</td>
<td>32,408</td>
<td>0.6</td>
<td>0.2</td>
<td>0.7</td>
<td>0.5</td>
<td>31.2</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>3,101</td>
<td>0.6</td>
<td>0.2</td>
<td>2.5</td>
<td>1.1</td>
<td>21.5</td>
</tr>
<tr>
<td>Hawaii</td>
<td>11,249</td>
<td>0.8</td>
<td>0.3</td>
<td>2.2</td>
<td>1.4</td>
<td>9.6</td>
</tr>
<tr>
<td>Mid Atlantic</td>
<td>2,804</td>
<td>0.8</td>
<td>0.8</td>
<td>2.0</td>
<td>3.6</td>
<td>10.6</td>
</tr>
<tr>
<td>Mid South</td>
<td>3,235</td>
<td>0.6</td>
<td>0.4</td>
<td>2.1</td>
<td>1.6</td>
<td>8.3</td>
</tr>
<tr>
<td>New England</td>
<td>6,239</td>
<td>0.7</td>
<td>0.3</td>
<td>2.1</td>
<td>1.6</td>
<td>13.3</td>
</tr>
<tr>
<td>North Atlantic</td>
<td>2,885</td>
<td>1.1</td>
<td>1.1</td>
<td>2.9</td>
<td>5.0</td>
<td>10.8</td>
</tr>
<tr>
<td>Northern Plains</td>
<td>3,520</td>
<td>1.2</td>
<td>1.2</td>
<td>2.7</td>
<td>4.0</td>
<td>16.8</td>
</tr>
<tr>
<td>Northwest</td>
<td>1,400</td>
<td>0.9</td>
<td>1.7</td>
<td>3.5</td>
<td>9.9</td>
<td>19.7</td>
</tr>
<tr>
<td>Rocky Mountain</td>
<td>5,608</td>
<td>0.9</td>
<td>0.3</td>
<td>1.9</td>
<td>1.0</td>
<td>10.3</td>
</tr>
<tr>
<td>Southeast</td>
<td>7,770</td>
<td>0.6</td>
<td>0.3</td>
<td>2.3</td>
<td>1.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Southwest</td>
<td>367</td>
<td>0.2</td>
<td>0.2</td>
<td>1.9</td>
<td>0.6</td>
<td>12.2</td>
</tr>
<tr>
<td>Safe Haven</td>
<td>84,633</td>
<td>0.8</td>
<td>0.4</td>
<td>2.7</td>
<td>1.6</td>
<td>19.3</td>
</tr>
</tbody>
</table>

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### LOSS VALUE RANGE

This report presents type of loss data broken down by value ranges ($0–$499, $500–$1,999, $2,000–$4,999, $5,000–$9,999, $10,000–$24,999, $25,000–$49,999, $50,000–$99,999, >$99,999).

<table>
<thead>
<tr>
<th>Type of Loss</th>
<th>Average Estimate Value</th>
<th>Total Estimates</th>
<th>Total Estimate Value</th>
<th>% of Total Estimates</th>
<th>% of Total Estimate Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLLAPSE</td>
<td>$6,651</td>
<td>16</td>
<td>$87,460</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>DRAIN BUCK</td>
<td>$3,031</td>
<td>12</td>
<td>$39,540</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>EARTHQUAKE</td>
<td>$3,064</td>
<td>7</td>
<td>$25,649</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FIRELIGHTNING</td>
<td>$34,223</td>
<td>2,150</td>
<td>$73,579,391</td>
<td>2.3%</td>
<td>8.7%</td>
</tr>
<tr>
<td>FIRE</td>
<td>$24,739</td>
<td>1,128</td>
<td>$29,905,177</td>
<td>1.2%</td>
<td>3.3%</td>
</tr>
<tr>
<td>FLOOD</td>
<td>$60,357</td>
<td>254</td>
<td>$17,666,783</td>
<td>0.3%</td>
<td>2.1%</td>
</tr>
<tr>
<td>FREEZE</td>
<td>$17,141</td>
<td>1</td>
<td>$17,141</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FREEZING</td>
<td>$6,049</td>
<td>8</td>
<td>$64,392</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>GLASS BREACHAGE</td>
<td>$352</td>
<td>2</td>
<td>$703</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>HAIL</td>
<td>$5,655</td>
<td>1,037</td>
<td>$5,906,689</td>
<td>1.1%</td>
<td>0.7%</td>
</tr>
<tr>
<td>HURRICANE</td>
<td>$4,339</td>
<td>1</td>
<td>$4,339</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>ICE OR SNOW</td>
<td>$7,727</td>
<td>9</td>
<td>$69,540</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>LIABILITY</td>
<td>$381</td>
<td>2</td>
<td>$1,791</td>
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<td>0.0%</td>
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<tr>
<td>LIGHTNING</td>
<td>$6,312</td>
<td>34</td>
<td>$214,610</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>NOT OTHERWISE CLASSIFIED</td>
<td>$9,568</td>
<td>3,977</td>
<td>$34,155,012</td>
<td>4.3%</td>
<td>4.0%</td>
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<tr>
<td>OTHER FIRE</td>
<td>$3,566</td>
<td>170</td>
<td>$661,026</td>
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</tr>
<tr>
<td>OTHER</td>
<td>$3,300</td>
<td>5</td>
<td>$10,900</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>STEAL &amp; BURGLARY</td>
<td>$6,729</td>
<td>556</td>
<td>$3,184,324</td>
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<td>0.0%</td>
</tr>
<tr>
<td>SMOKE</td>
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<td>605</td>
<td>$2,905,000</td>
<td>0.0%</td>
<td>0.3%</td>
</tr>
<tr>
<td>THEFT</td>
<td>$2,225</td>
<td>622</td>
<td>$1,353,766</td>
<td>0.7%</td>
<td>0.2%</td>
</tr>
<tr>
<td>TORNADO</td>
<td>$6,654</td>
<td>7</td>
<td>$46,087</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>UNEXPLOD</td>
<td>$22,432</td>
<td>97</td>
<td>$2,032,429</td>
<td>0.1%</td>
<td>0.2%</td>
</tr>
<tr>
<td>VANDALISM &amp; MAJACIOUS MISCHIEF</td>
<td>$3,070</td>
<td>611</td>
<td>$2,368,300</td>
<td>0.7%</td>
<td>0.3%</td>
</tr>
<tr>
<td>VANDALISM</td>
<td>$3,426</td>
<td>98</td>
<td>$335,767</td>
<td>0.1%</td>
<td>0.0%</td>
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<tr>
<td>VEHICLE</td>
<td>$1,156</td>
<td>208</td>
<td>$1,280,520</td>
<td>0.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>WATER DAMAGE &amp; FREEZING</td>
<td>$4,600</td>
<td>11,143</td>
<td>$51,257,340</td>
<td>12.0%</td>
<td>6.0%</td>
</tr>
<tr>
<td>WATER</td>
<td>$4,127</td>
<td>6,656</td>
<td>$27,511,683</td>
<td>7.2%</td>
<td>3.2%</td>
</tr>
<tr>
<td>WIND/HAIL</td>
<td>$9,403</td>
<td>62,993</td>
<td>$591,769,819</td>
<td>67.9%</td>
<td>69.6%</td>
</tr>
<tr>
<td>WIND</td>
<td>$9,773</td>
<td>611</td>
<td>$3,025,191</td>
<td>0.7%</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

**Safe Haven**

- **All**
  - **Total**
    - **Average Estimate Value**: $3,151
    - **Total Estimates**: 92,700
    - **Total Estimate Value**: $849,273,640
    - **% of Total Estimates**: 100.0%
    - **% of Total Estimate Value**: 100.0%
When you drill down on one of the types of loss, you’ll see further detail for each value range.

### Safe Haven

<table>
<thead>
<tr>
<th>Region</th>
<th>Value Range</th>
<th>Average Estimate Value</th>
<th>Total Estimate Value</th>
<th>% of Total Estimates</th>
<th>% of Total Estimate Value</th>
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<tbody>
<tr>
<td>All</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$0 - $499</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
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<td>$500 - $1,999</td>
<td>$1,000</td>
<td>$4,274</td>
<td>20.0%</td>
<td>1.4%</td>
</tr>
<tr>
<td></td>
<td>$2,000 - $4,999</td>
<td>$3,467</td>
<td>$13,670</td>
<td>20.0%</td>
<td>4.4%</td>
</tr>
<tr>
<td></td>
<td>$5,000 - $9,999</td>
<td>$6,440</td>
<td>$5,640</td>
<td>5.0%</td>
<td>1.7%</td>
</tr>
<tr>
<td></td>
<td>$10,000 - $24,999</td>
<td>$14,106</td>
<td>$699,302</td>
<td>36.0%</td>
<td>31.3%</td>
</tr>
<tr>
<td></td>
<td>$25,000 - $49,999</td>
<td>$42,551</td>
<td>$127,662</td>
<td>15.0%</td>
<td>40.2%</td>
</tr>
<tr>
<td></td>
<td>$50,000 - $99,999</td>
<td>$86,834</td>
<td>$86,834</td>
<td>5.0%</td>
<td>21.0%</td>
</tr>
<tr>
<td></td>
<td>Greater than $99,999</td>
<td>$0</td>
<td>$0</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Alaska</td>
<td>$25,718</td>
<td>122</td>
<td>$3,137,560</td>
<td>10.8%</td>
<td>11.2%</td>
</tr>
<tr>
<td>Canada</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Florida</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## MATERIALS BUDGET

This report presents the dollar value budgeted for materials for the various levels of hierarchy.

### Safe Haven

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Estimates</th>
<th>Total Estimate Value</th>
<th>Total Materials Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
<td>3,462</td>
<td>$13,387,003</td>
<td>$4,915,471</td>
</tr>
<tr>
<td>Canada</td>
<td>429</td>
<td>$7,472,761</td>
<td>$740,584</td>
</tr>
<tr>
<td>Florida</td>
<td>29,815</td>
<td>$233,472,833</td>
<td>$72,163,207</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>6,084</td>
<td>$140,919,566</td>
<td>$36,293,056</td>
</tr>
<tr>
<td>Hawaii</td>
<td>12,010</td>
<td>$75,792,454</td>
<td>$21,420,300</td>
</tr>
<tr>
<td>Mid Atlantic</td>
<td>2,830</td>
<td>$17,130,045</td>
<td>$4,804,854</td>
</tr>
<tr>
<td>Mid South</td>
<td>5,974</td>
<td>$67,489,701</td>
<td>$17,032,206</td>
</tr>
<tr>
<td>New England</td>
<td>6,256</td>
<td>$54,852,740</td>
<td>$17,059,784</td>
</tr>
<tr>
<td>North Atlantic</td>
<td>2,891</td>
<td>$18,888,005</td>
<td>$5,730,004</td>
</tr>
<tr>
<td>Northern Plains</td>
<td>3,786</td>
<td>$22,371,367</td>
<td>$6,923,056</td>
</tr>
<tr>
<td>Northwest</td>
<td>1,417</td>
<td>$12,031,040</td>
<td>$9,519,016</td>
</tr>
<tr>
<td>Rocky Mountain</td>
<td>8,247</td>
<td>$80,872,467</td>
<td>$23,771,264</td>
</tr>
<tr>
<td>Southeast</td>
<td>9,297</td>
<td>$73,267,010</td>
<td>$22,093,084</td>
</tr>
<tr>
<td>Southwest</td>
<td>412</td>
<td>$2,459,267</td>
<td>$681,234</td>
</tr>
</tbody>
</table>

| Safe Haven   | 92,200          | $833,237,637         | $232,903,601           |

**Note:** U.S. estimates are in U.S. Dollars, Canadian estimates are in Canadian Dollars. Total materials budget excludes tax.

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**MISCELLANEOUS ITEMS**
This report shows the number and dollar amount of miscellaneous items per structural category and contents department.

<table>
<thead>
<tr>
<th>Structural Assignments</th>
<th>Misc Items</th>
<th>Total Items</th>
<th>% Misc Items</th>
<th>Misc Items Value</th>
<th>Total Items Value</th>
<th>% Misc Items Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>APP</td>
<td>0</td>
<td>24</td>
<td>0.0%</td>
<td>$0</td>
<td>$10,926</td>
<td>0.0%</td>
</tr>
<tr>
<td>CAB</td>
<td>0</td>
<td>20</td>
<td>0.0%</td>
<td>$0</td>
<td>$26,523</td>
<td>0.0%</td>
</tr>
<tr>
<td>CIG</td>
<td>0</td>
<td>2</td>
<td>0.0%</td>
<td>$0</td>
<td>$7</td>
<td>0.0%</td>
</tr>
<tr>
<td>CHP</td>
<td>0</td>
<td>3</td>
<td>0.0%</td>
<td>$0</td>
<td>$866</td>
<td>0.0%</td>
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<tr>
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<tr>
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<th>Misc Items</th>
<th>Total Items</th>
<th>% Misc Items</th>
<th>Misc Items Value</th>
<th>Total Items Value</th>
<th>% Misc Items Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<table>
<thead>
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<th>Contents Assignments</th>
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<th>Total Items</th>
<th>% Misc Items</th>
<th>Misc Items Value</th>
<th>Total Items Value</th>
<th>% Misc Items Value</th>
</tr>
</thead>
<tbody>
<tr>
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<td>1</td>
<td>0.0%</td>
<td>$0</td>
<td>$4,708</td>
<td>0.0%</td>
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</table>
### PRICE DEVIATIONS

This report presents how estimate prices deviate from the price list prices. Information in this report includes estimate and line item counts, estimate value, value of deviating line items, average estimate dollar deviation, and percent overall dollar deviation.

<table>
<thead>
<tr>
<th>Safe Haven</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region</td>
<td></td>
</tr>
<tr>
<td>Alaska</td>
<td>3,452</td>
</tr>
<tr>
<td>Canada</td>
<td>479</td>
</tr>
<tr>
<td>Florida</td>
<td>9,816</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>6,004</td>
</tr>
<tr>
<td>Hawaii</td>
<td>2,010</td>
</tr>
<tr>
<td>Mid Atlantic</td>
<td>3,000</td>
</tr>
<tr>
<td>Mid South</td>
<td>6,914</td>
</tr>
<tr>
<td>New England</td>
<td>6,256</td>
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<tr>
<td>North Atlantic</td>
<td>2,951</td>
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<tr>
<td>Northern Plains</td>
<td>3,765</td>
</tr>
<tr>
<td>Northwest</td>
<td>1,417</td>
</tr>
<tr>
<td>Rocky Mountain</td>
<td>8,247</td>
</tr>
<tr>
<td>Southwest</td>
<td>9,257</td>
</tr>
<tr>
<td>Safe Haven</td>
<td>92,700</td>
</tr>
</tbody>
</table>

**NOTE:** U.S. estimates are in U.S. Dollars, Canadian estimates are in Canadian Dollars.
**RESPONSE TIME**

This report presents various response times (contacted, inspected, returned) for contractors for each estimate. This report also gives response time summary information at the various levels of the hierarchy. The “start” time for the response time calculations is “Date Received.”

<table>
<thead>
<tr>
<th></th>
<th>Safe Haven</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Region</strong></td>
<td><strong>Total Estimates</strong></td>
<td><strong>Avg Days until Contacted</strong></td>
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<tr>
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<tr>
<td>Florida</td>
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<td>Great Lakes</td>
<td>6,094</td>
<td>0.3</td>
</tr>
<tr>
<td>Hawaii</td>
<td>12,010</td>
<td>0.8</td>
</tr>
<tr>
<td>Mid Atlantic</td>
<td>2,830</td>
<td>0.8</td>
</tr>
<tr>
<td>Mid South</td>
<td>5,974</td>
<td>0.6</td>
</tr>
<tr>
<td>New England</td>
<td>6,295</td>
<td>0.7</td>
</tr>
<tr>
<td>North Atlantic</td>
<td>2,811</td>
<td>1.1</td>
</tr>
<tr>
<td>Northern Plains</td>
<td>3,786</td>
<td>1.3</td>
</tr>
<tr>
<td>Northwest</td>
<td>1,417</td>
<td>0.9</td>
</tr>
<tr>
<td>Rocky Mountain</td>
<td>8,247</td>
<td>0.9</td>
</tr>
<tr>
<td>Southwest</td>
<td>9,297</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>422</td>
<td>0.2</td>
</tr>
<tr>
<td></td>
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<tr>
<td><strong>Safe Haven</strong></td>
<td><strong>92,700</strong></td>
<td><strong>0.8</strong></td>
</tr>
</tbody>
</table>

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**SUB LIMITS REPORT**
This report shows the sub limit category, and allows the user to drill down to view sub limit data for a specific area and continue to the estimate level. This report shows the counts, dollar amounts, and percentages when sub limits were either exceeded or not exceeded.

<table>
<thead>
<tr>
<th>Sub Limit</th>
<th>Total Estimates</th>
<th>Estimate Value</th>
<th>Sub Limit Total</th>
<th>Sub Limit % of Estimates</th>
<th>Single Limit Overage</th>
<th>Single Limit Average Overage</th>
<th>Aggregate Limit Overage</th>
<th>Aggregate Limit Average Overage</th>
<th>Number of Estimates with Overages</th>
<th>% of Estimates with Overages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Property On Premises</td>
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<td>$20,664</td>
<td>$7,218</td>
<td>34.9%</td>
<td>$0</td>
<td>$0</td>
<td>$2,687</td>
<td>$2,687</td>
<td>1</td>
<td>100.0%</td>
</tr>
<tr>
<td>Business Items Off Premises</td>
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<td>$52,050</td>
<td>$12,680</td>
<td>24.4%</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Cash</td>
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<td>$123,243</td>
<td>$6,414</td>
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<td>$0</td>
<td>$0</td>
<td>$5,192</td>
<td>$1,038</td>
<td>5</td>
<td>100.0%</td>
</tr>
<tr>
<td>Collectibles</td>
<td>1</td>
<td>$38,059</td>
<td>$1,163</td>
<td>3.1%</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Firearms</td>
<td>16</td>
<td>$370,011</td>
<td>$55,208</td>
<td>14.9%</td>
<td>$11,366</td>
<td>$1,256</td>
<td>$1,076</td>
<td>$1,988</td>
<td>9</td>
<td>60.0%</td>
</tr>
<tr>
<td>Jewelry/Elective</td>
<td>17</td>
<td>$413,505</td>
<td>$96,826</td>
<td>22.3%</td>
<td>$37,967</td>
<td>$4,212</td>
<td>$860</td>
<td>$297</td>
<td>19</td>
<td>58.9%</td>
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<tr>
<td>Money, etc.</td>
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<td>$17,050</td>
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<td>$365</td>
<td>$8,861</td>
<td>$443</td>
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<td>87.5%</td>
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<td>Musical Instruments</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>0</td>
<td>0.0%</td>
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<tr>
<td>On Vehicle Electronic Apparatus</td>
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<td>$8,500</td>
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<td>$0</td>
<td>$8,000</td>
<td>$8,000</td>
<td>1</td>
<td>100.0%</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>0</td>
<td>0.0%</td>
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<tr>
<td>Securities/Documents, etc</td>
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<tr>
<td>Silverware, etc</td>
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<td>$603</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>0</td>
<td>0.0%</td>
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<td>$1,550</td>
<td>$1,000</td>
<td>$0</td>
<td>$0</td>
<td>1</td>
<td>100.0%</td>
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</tbody>
</table>

| Safe Haven | 39 | $1,013,722 | $228,167 | 22.5% | $52,493 | $4,374 | $37,534 | $1,787 | 26 | 66.7% |

Department:
- Rocky Mountain
- Southern California
SUPPLEMENT
This report will detail the total number of supplements, the percentage of supplements per estimate, the total estimate count, the total supplement total, and the average supplement total. A supplement is defined as an assignment that was marked as file closed and has been re-opened in XactAnalysis because supplement work is required on the file.
# Type of Loss

This report presents estimate value and quantity breakdown for estimates by type of loss.

<table>
<thead>
<tr>
<th>Safe Haven</th>
<th>All</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Type of Loss</th>
<th>Total Estimates</th>
<th>Average Estimate Value</th>
<th>Total Estimate Value</th>
<th>% of Total Estimates</th>
<th>% of Total Estimate Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLLAPSE</td>
<td>16</td>
<td>$8,091</td>
<td>$97,480</td>
<td>0.0%</td>
<td>0.0%</td>
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<td>82</td>
<td>$3,501</td>
<td>$205,546</td>
<td>0.1%</td>
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<tr>
<td>EARTHQUAKE</td>
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<td>$3,064</td>
<td>$25,546</td>
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<td>0.0%</td>
</tr>
<tr>
<td>FIRE &amp; LIGHTNING</td>
<td>2,130</td>
<td>$34,223</td>
<td>$73,599,331</td>
<td>2.3%</td>
<td>8.8%</td>
</tr>
<tr>
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<td>$24,721</td>
<td>$27,954,812</td>
<td>1.2%</td>
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<td>FLOOD</td>
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<td>0.0%</td>
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<td>0.0%</td>
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<td>GLASS DAMAGE</td>
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<td>$703</td>
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<td>0.0%</td>
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<tr>
<td>HAIL</td>
<td>1,037</td>
<td>$5,096</td>
<td>$5,096,083</td>
<td>1.1%</td>
<td>0.7%</td>
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<tr>
<td>HURRICANE</td>
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<td>$4,339</td>
<td>$4,339</td>
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<td>0.0%</td>
</tr>
<tr>
<td>ICE D &amp; SNOW</td>
<td>3</td>
<td>$7,727</td>
<td>$66,540</td>
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<td>0.0%</td>
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<tr>
<td>LIABILITY</td>
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<td>$101</td>
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<td>0.0%</td>
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<td>LIGHTNING</td>
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<td>0.0%</td>
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<tr>
<td>NOT OTHER</td>
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<td>$33,874,295</td>
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<td>4.1%</td>
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<td>0.1%</td>
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<tr>
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<td>$16,393</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
<td>SEWER &amp; DRAIN LOSS</td>
<td>556</td>
<td>$6,737</td>
<td>$3,164,324</td>
<td>0.6%</td>
<td>0.4%</td>
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<tr>
<td>SMOKE</td>
<td>605</td>
<td>$4,794</td>
<td>$2,900,093</td>
<td>0.6%</td>
<td>0.4%</td>
</tr>
<tr>
<td>THEFT</td>
<td>624</td>
<td>$2,226</td>
<td>$1,288,786</td>
<td>0.7%</td>
<td>0.2%</td>
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<tr>
<td>TORNADO</td>
<td>7</td>
<td>$6,504</td>
<td>$46,007</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
<td>UNKNOWN</td>
<td>87</td>
<td>$23,430</td>
<td>$2,238,423</td>
<td>0.1%</td>
<td>0.2%</td>
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<tr>
<td>VANDALISM &amp; MALICIOUS MISCHIEF</td>
<td>611</td>
<td>$3,287</td>
<td>$2,288,303</td>
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<td>0.3%</td>
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<tr>
<td>VANDALISM</td>
<td>96</td>
<td>$3,438</td>
<td>$35,767</td>
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<td>0.0%</td>
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<td>200</td>
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<td>$1,200,406</td>
<td>0.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>WATER DAMAGE &amp; FREEZING</td>
<td>11,143</td>
<td>$4,990</td>
<td>$51,249,078</td>
<td>12.0%</td>
<td>6.2%</td>
</tr>
<tr>
<td>WATER</td>
<td>6,966</td>
<td>$4,119</td>
<td>$27,669,312</td>
<td>7.2%</td>
<td>3.3%</td>
</tr>
<tr>
<td>WINDHAIL</td>
<td>639</td>
<td>$8,392</td>
<td>$581,260,975</td>
<td>67.9%</td>
<td>70.8%</td>
</tr>
<tr>
<td>WIND</td>
<td>611</td>
<td>$5,737</td>
<td>$3,506,161</td>
<td>0.7%</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

Safe Haven                      | 92,700         | $8,983                 | $833,156,993        | 100.0%                | 100.0%                     |
**Value Range**

This report presents estimate data broken down by value ranges ($0–$499, $500–$1,999, $2,000–$4,999, $5,000–$9,999, $10,000–$24,999, $25,000–$49,999, $50,000–$99,999, >$99,999).

### Safe Haven

<table>
<thead>
<tr>
<th>Region</th>
<th>Value Range</th>
<th>Average Estimate Value</th>
<th>Total Estimates</th>
<th>Total Estimate Value</th>
<th>% of Total Estimates</th>
<th>% of Total Estimate Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Region</strong></td>
<td></td>
<td><strong>Value Range</strong></td>
<td><strong>Average Estimate Value</strong></td>
<td><strong>Total Estimates</strong></td>
<td><strong>Total Estimate Value</strong></td>
<td><strong>% of Total Estimates</strong></td>
</tr>
<tr>
<td>Alaska</td>
<td></td>
<td>$0.00–$499</td>
<td>$1,924</td>
<td>516</td>
<td>$44,705</td>
<td>9.1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$500.00–$1,999</td>
<td>$2,203</td>
<td>1,089</td>
<td>$41,997</td>
<td>8.8%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$2,000.00–$4,999</td>
<td>$3,246</td>
<td>1,130</td>
<td>$66,707</td>
<td>15.8%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$5,000.00–$9,999</td>
<td>$6,919</td>
<td>552</td>
<td>$38,196</td>
<td>15.9%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$10,000.00–$24,999</td>
<td>$14,534</td>
<td>278</td>
<td>$40,645</td>
<td>20.8%</td>
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<tr>
<td></td>
<td></td>
<td>$25,000.00–$49,999</td>
<td>$33,873</td>
<td>66</td>
<td>$2,226,621</td>
<td>5.9%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$50,000.00–$99,999</td>
<td>$60,929</td>
<td>31</td>
<td>$2,123,679</td>
<td>11.0%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Greater than $99,999</td>
<td>$157,669</td>
<td>13</td>
<td>$2,049,999</td>
<td>4.1%</td>
</tr>
<tr>
<td>Alaska</td>
<td></td>
<td>$5,980</td>
<td>3,482</td>
<td>$19,387,963</td>
<td>3.7%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Canada</td>
<td></td>
<td>$0.00–$499</td>
<td>$47</td>
<td>78</td>
<td>$2,954</td>
<td>16.2%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$500.00–$999</td>
<td>$1,182</td>
<td>90</td>
<td>$121,599</td>
<td>21.0%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$2,000.00–$4,999</td>
<td>$3,595</td>
<td>122</td>
<td>$410,858</td>
<td>25.4%</td>
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<tr>
<td></td>
<td></td>
<td>$5,000.00–$9,999</td>
<td>$6,895</td>
<td>68</td>
<td>$312,028</td>
<td>20.5%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$10,000.00–$24,999</td>
<td>$14,148</td>
<td>39</td>
<td>$658,885</td>
<td>9.1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$25,000.00–$49,999</td>
<td>$30,895</td>
<td>10</td>
<td>$364,282</td>
<td>2.3%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$50,000.00–$99,999</td>
<td>$68,604</td>
<td>1</td>
<td>$68,604</td>
<td>0.2%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Greater than $99,999</td>
<td>$342,131</td>
<td>1</td>
<td>$342,131</td>
<td>0.2%</td>
</tr>
<tr>
<td>Canada</td>
<td></td>
<td>$5,964</td>
<td>429</td>
<td>$2,472,751</td>
<td>0.5%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Central Pacific</td>
<td></td>
<td>$0.00–$499</td>
<td>$2,009</td>
<td>2,977</td>
<td>$621,502</td>
<td>10.0%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$500.00–$999</td>
<td>$11,192</td>
<td>4,047</td>
<td>$6,898,308</td>
<td>16.7%</td>
</tr>
</tbody>
</table>

Report Created 05/28/2008 08:51 pm EDT
**ZIP CODES**

This report presents estimate value and quantity breakdown for estimates by ZIP Code.

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Estimates</th>
<th>Average Estimate Value</th>
<th>Total Estimate Value</th>
<th>% of Total Estimate Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>3,462</td>
<td>$5,700</td>
<td>$19,365,554</td>
<td>2.7%</td>
</tr>
<tr>
<td>Alaska</td>
<td>3,462</td>
<td>$5,700</td>
<td>$19,365,554</td>
<td>2.7%</td>
</tr>
<tr>
<td>Canada</td>
<td>429</td>
<td>$5,764</td>
<td>$2,472,751</td>
<td>0.3%</td>
</tr>
<tr>
<td>Central Pacific</td>
<td>20,671</td>
<td>$7,884</td>
<td>$157,442,523</td>
<td>22.4%</td>
</tr>
<tr>
<td>Central Plains</td>
<td>6,094</td>
<td>$3,154</td>
<td>$140,916,546</td>
<td>4.0%</td>
</tr>
<tr>
<td>Eastern</td>
<td>12,010</td>
<td>$2,311</td>
<td>$27,922,454</td>
<td>4.1%</td>
</tr>
<tr>
<td>Florida</td>
<td>2,890</td>
<td>$8,049</td>
<td>$17,120,046</td>
<td>2.2%</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>1,284</td>
<td>$1,764</td>
<td>$1,404,627</td>
<td>0.3%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>1,574</td>
<td>$3,154</td>
<td>$101,883,806</td>
<td>7.0%</td>
</tr>
<tr>
<td>Midwest</td>
<td>3,766</td>
<td>$2,788</td>
<td>$10,197,256</td>
<td>2.7%</td>
</tr>
<tr>
<td>Mid South</td>
<td>1,417</td>
<td>$2,491</td>
<td>$3,422,010</td>
<td>1.1%</td>
</tr>
<tr>
<td>New England</td>
<td>9,047</td>
<td>$10,621</td>
<td>$97,647,246</td>
<td>13.4%</td>
</tr>
<tr>
<td>North Atlantic</td>
<td>3,367</td>
<td>$7,884</td>
<td>$26,469,276</td>
<td>3.9%</td>
</tr>
<tr>
<td>Northern California</td>
<td>412</td>
<td>$5,764</td>
<td>$2,311,040</td>
<td>0.3%</td>
</tr>
<tr>
<td>Northern Plains</td>
<td>1,417</td>
<td>$2,491</td>
<td>$12,031,040</td>
<td>1.1%</td>
</tr>
<tr>
<td>Northwest</td>
<td>5,266</td>
<td>$2,788</td>
<td>$14,562,748</td>
<td>2.1%</td>
</tr>
<tr>
<td>Rocky Mountain</td>
<td>2,890</td>
<td>$6,049</td>
<td>$157,442,523</td>
<td>2.2%</td>
</tr>
<tr>
<td>Southeast</td>
<td>3,766</td>
<td>$2,788</td>
<td>$101,883,806</td>
<td>7.0%</td>
</tr>
<tr>
<td>Southern California</td>
<td>1,417</td>
<td>$2,491</td>
<td>$3,422,010</td>
<td>1.1%</td>
</tr>
</tbody>
</table>
**TREND MANAGEMENT REPORTS**

**ESTIMATE TRENDING**

This report presents the average estimate value, estimate volume, and total estimate value by month for a 6–13 month period. The data will be displayed on three separate time plots.
**ESTIMATE BREAKDOWN BY LABOR/MATERIALS/EQUIPMENT**

This report presents the average estimate value, average estimate labor value, average estimate materials value, and the average estimate equipment value by month for a 6–13 month period. The data will be shown on four separate time plots.
Trend Management Reports

---

Average Equipment Value

![Graph showing average equipment value over time]

NOTE: All amounts are in U.S. Dollars. (Excel is a trademark of Microsoft Corporation.)
**ESTIMATE TRENDING FOR CONTENTS**

This report presents the average contents estimate value, volume, and total value by month for a 6–13 month period. The data will be displayed on three separate time plots.

### Number of Estimates

![Number of Estimates Chart]

### Estimate Value

![Estimate Value Chart]

### Average Estimate Value

![Average Estimate Value Chart]

### Table of Estimated Values

<table>
<thead>
<tr>
<th>Month</th>
<th>Estimate Value</th>
<th>Average Estimate Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 2002</td>
<td>$10,956</td>
<td>$2,356</td>
</tr>
<tr>
<td>April 2002</td>
<td>10,956</td>
<td>10</td>
</tr>
<tr>
<td>May 2002</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>June 2002</td>
<td>13,452</td>
<td>13,452</td>
</tr>
<tr>
<td>July 2002</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>August 2002</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>September 2002</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>October 2002</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>November 2002</td>
<td>10,956</td>
<td>10,956</td>
</tr>
<tr>
<td>December 2002</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>January 2003</td>
<td>10,956</td>
<td>10,956</td>
</tr>
<tr>
<td>Safe Haven</td>
<td>10,956</td>
<td>10,956</td>
</tr>
</tbody>
</table>
This appendix contains samples of the following industry trend reports available in XactAnalysis.

<table>
<thead>
<tr>
<th>Report</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Estimate Value</td>
<td>272</td>
</tr>
<tr>
<td>Basket of Goods Material only</td>
<td>274</td>
</tr>
<tr>
<td>Carpet Replacement Macro</td>
<td>276</td>
</tr>
<tr>
<td>Drywall Material Composite</td>
<td>278</td>
</tr>
<tr>
<td>Garage Door Macro</td>
<td>280</td>
</tr>
<tr>
<td>Kitchen Smoke Damage</td>
<td>282</td>
</tr>
<tr>
<td>Paint Composite</td>
<td>284</td>
</tr>
<tr>
<td>Retail Labor Breakdown</td>
<td>286</td>
</tr>
<tr>
<td>Roof Replacement</td>
<td>288</td>
</tr>
<tr>
<td>Small Bathroom Water Loss</td>
<td>290</td>
</tr>
<tr>
<td>Vandalism Macro</td>
<td>292</td>
</tr>
<tr>
<td>Water Damage Mitigation Estimate</td>
<td>294</td>
</tr>
<tr>
<td>Basket of Goods Labor &amp; Materials</td>
<td>273</td>
</tr>
<tr>
<td>Carpet Material Composite</td>
<td>275</td>
</tr>
<tr>
<td>Door Replacement Macro</td>
<td>277</td>
</tr>
<tr>
<td>Fire Damage—Medium Size</td>
<td>279</td>
</tr>
<tr>
<td>Interior Trim/Moldings Composite</td>
<td>281</td>
</tr>
<tr>
<td>Lumber Composite</td>
<td>283</td>
</tr>
<tr>
<td>Retail Labor Average Cost</td>
<td>285</td>
</tr>
<tr>
<td>Retail Labor by Trade</td>
<td>287</td>
</tr>
<tr>
<td>Roofing Composite</td>
<td>289</td>
</tr>
<tr>
<td>Small Hail Loss</td>
<td>291</td>
</tr>
<tr>
<td>Vinyl Flooring Composite</td>
<td>293</td>
</tr>
<tr>
<td>Wood Floor Refinish Macro</td>
<td>295</td>
</tr>
</tbody>
</table>
**Average Estimate Value**

This report shows the average estimate dollar value for the industry for up to five years. All data in this report is based on estimates returned to XactAnalysis.

![Average Estimate Value Chart](chart_image)

### Additional Information:

**Research and Analysis Overview**

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Average Estimate Value</td>
<td>6119.40</td>
<td>5687.05</td>
<td>5484.00</td>
<td>6210.91</td>
<td>5893.27</td>
<td>6286.49</td>
<td>7054.99</td>
<td>5650.40</td>
<td>7239.14</td>
<td>7673.50</td>
</tr>
</tbody>
</table>

This report shows the average estimate dollar value for the area selected. All data in this report is based on estimates returned to XactAnalysis.
**Basket of Goods Labor & Materials**

This report shows the average dollar value for a “Basket of Goods Estimate” for up to five years. All data in this report is based on building cost data published by Xactware.

![Graph showing trend in Basket of Goods Labor & Materials]

**Additional Information:**
- Report Contents
- Research and Analysis Overview

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Basket of Goods Labor &amp; Materials</td>
<td>42955.43</td>
<td>42662.82</td>
<td>42514.74</td>
<td>42893.93</td>
<td>44379.26</td>
<td>45233.98</td>
<td>46567.71</td>
<td>46927.26</td>
<td>45668.20</td>
<td>46666.32</td>
<td>47522.15</td>
<td>47055.42</td>
<td>47203.92</td>
<td>47251.79</td>
<td>47362.25</td>
<td>47621.95</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This report is based on building cost data published by Xactware for the area selected. The “Basket of Goods Estimate” is comprised of a set of highly used items (i.e. floor covering, painting, drywall, roofing, etc.) in various quantities based on installed pricing.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the price of these items. In order to fully identify the causes of the trend, further research and analysis will be needed.
**Basket of Goods Material Only**

This report shows the average dollar value for materials in a “Basket of Goods Estimate” for up to five years. All data in this report is based on building cost data published by Xactware.
CARPET MATERIAL COMPOSITE

This report shows the average composite price for carpeting for up to five years. All data in this report is based on building cost data published by Xactware.

Additional Information:

Specific Trend Analysis:
Q4 2008
As the national level, carpet material has seen increases due to a number of factors. Manufacturers and material suppliers have attributed the increases to rising energy, fuel, and petrol costs. Suppliers have cited higher shipping/wage and increases in raw material costs as significant factors to the rise in pricing.

This report is based on building cost data published by Xactware for the area selected. The value plotted for each period is the average of the carpet composite pricing from this area. The carpet material composite pricing is based on a basket of goods which is compiled of a set of highly used items in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
CARPET REPLACEMENT MACRO

This report shows the unit prices for items used in a sample carpet replacement macro (replacing carpet in one room). All data in this report is based on building cost data published by Xactware.
**Door Replacement Macro**

This report shows the unit prices for items used in a sample door replacement macro. All data in this report is based on building cost data published by Xactware.

<table>
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<tr>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Door Replacement Macro</td>
<td>279.71</td>
<td>275.92</td>
<td>290.48</td>
<td>285.67</td>
<td>277.38</td>
<td>278.43</td>
<td>272.46</td>
<td>277.79</td>
<td>261.27</td>
<td>265.73</td>
<td>279.64</td>
<td>262.77</td>
<td>267.26</td>
<td>284.74</td>
<td>285.32</td>
<td>285.45</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The report is based on building cost data published by Xactware for the area selected. The "Door Replacement Macro" is comprised of a common set of items used in a sample door replacement macro in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
**Drywall Material Composite**

This report shows the average composite price for drywall materials for up to five years. All data in this report is based on building cost data published by Xactware.

![Drywall Composite Chart]

**Additional Information:**

- **Report Context:**
  - Research and Analysis Overview

**Specific Trend Analysis:**

- **Q3 2007:**
  - At the national level, the recent slight slowdown in residential and commercial construction has impacted the supply and demand of gypsum board causing a decrease in price.

- **Q2 2008:**
  - Drywall material prices continue to rise due to a strong demand in both the

<table>
<thead>
<tr>
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<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Drywall Composite</td>
<td>463.36</td>
<td>460.44</td>
<td>461.02</td>
<td>497.93</td>
<td>476.91</td>
<td>410.12</td>
<td>394.84</td>
<td>257.01</td>
<td>324.21</td>
<td>325.12</td>
<td>342.93</td>
<td>347.03</td>
<td>362.61</td>
<td>362.93</td>
<td>367.30</td>
<td></td>
</tr>
</tbody>
</table>

This report is based on building cost data published by Xactware for the area selected. The value plotted for each period is the sum of the drywall composite pricing from this area. The drywall material composite pricing is based on a basket of goods which is comprised of a set of highly used items in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
FIRE DAMAGE—MEDIUM SIZE

This report is based on quarterly building cost data published by Xactware for the area selected. It is comprised of a set of items that would be used in a sample medium-size fire loss in various quantities, based on installed pricing.

This report is based on building cost data published by Xactware for the area selected. The "Fire Loss estimate" is comprised of a set of items that would be used in a sample medium-size fire loss in various quantities based on installed pricing.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
**Garage Door Macro**

This report shows the unit prices for items used in a sample garage door replacement macro. All data in this report is based on building cost data published by Xactware.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Garage Door Macro</td>
<td>1144.17</td>
<td>1152.44</td>
<td>1150.96</td>
<td>1105.22</td>
<td>1220.49</td>
<td>1232.36</td>
<td>1209.62</td>
<td>1241.01</td>
<td>1242.03</td>
<td>1250.09</td>
<td>1255.06</td>
<td>1251.36</td>
<td>1264.10</td>
<td>1250.06</td>
<td>1260.02</td>
<td></td>
</tr>
</tbody>
</table>

This report is based on building cost data published by Xactware for the area selected. The "Garage Door Macro" is comprised of a common set of items used in a sample garage door macro in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the causes of the trend, further research and analysis will be needed.
**INTERIOR TRIM/MOLDINGS COMPOSITE**
This report shows the average composite price for interior trim/molding for up to five years. All data in this report is based on building cost data published by Xactware.

---

**Additional Information:**
- [Report Contexts](#)
- Research and Analysis Overview

**Specific Trend Analysis:**
*Q3 2007*
At the national level the combination of the slight slow down in residential and commercial construction as well as the recent decrease in lumber pricing in general has impacted the interior trim pricing.

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</thead>
<tbody>
<tr>
<td>Interior Trim / Moldings Comp.</td>
<td>3311.73</td>
<td>3345.43</td>
<td>3729.22</td>
<td>3769.35</td>
<td>3750.56</td>
<td>3128.65</td>
<td>3179.41</td>
<td>3300.76</td>
<td>3448.63</td>
<td>3543.95</td>
<td>3577.83</td>
<td>3568.48</td>
<td>3593.66</td>
<td>3595.79</td>
<td>3574.34</td>
<td>3576.59</td>
</tr>
</tbody>
</table>

This report is based on building cost data published by Xactware for the area selected. The value plotted for each period is the sum of the interior trim/moldings composite pricing from this area. The interior trim material composite pricing is based on a basket of goods which is comprised of a set of highly used items in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
**Kitchen Smoke Damage**

This report shows the unit prices for sample small kitchen smoke damage estimate. All data in this report is based on building cost data published by Xactware.

![Graph showing Kitchen Smoke Damage over time](image)

### Additional Information:

- **Report Contents**
- **Research and Analysis Overview**

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</thead>
<tbody>
<tr>
<td>Kitchen Smoke Damage</td>
<td>4436.76</td>
<td>4471.84</td>
<td>4516.24</td>
<td>4555.16</td>
<td>4600.24</td>
<td>4651.55</td>
<td>4705.59</td>
<td>4760.17</td>
<td>4816.77</td>
<td>5026.45</td>
<td>5062.23</td>
<td>5092.70</td>
<td>5032.10</td>
<td>5052.58</td>
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</tbody>
</table>

This report is based on building cost data published by Xactware for the area selected. The “Kitchen Smoke Damage Estimate” is comprised of a common set of items used for kitchen smoke damage in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
**LUMBER COMPOSITE**

This report shows the average composite price for lumber for up to five years. All data in this report is based on building cost data published by Xactware.

---

Additional Information:
- **Research and Analysis Overview**: [Research and Analysis Overview]

**Specific Trend Analysis:**

**Q1 2007**

The steady decrease in cost for lumber materials is due in large part to an increase in Canadian imports and a slight slow down in the housing building markets across the United States.

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<tbody>
<tr>
<td>Lumber</td>
<td>3275.69</td>
<td>3231.18</td>
<td>3920.70</td>
<td>3278.35</td>
<td>3728.70</td>
<td>3678.35</td>
<td>2761.84</td>
<td>2614.67</td>
<td>2504.20</td>
<td>2875.05</td>
<td>2508.03</td>
<td>2586.54</td>
<td>2478.54</td>
<td>2454.93</td>
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</tbody>
</table>

This report is based on building cost data published by Xactware for the area selected. The value plotted for each period is the sum of the lumber composite pricing from this area. The lumber material composite pricing is based on a basket of goods which is comprised of a set of highly used items in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
Paint Composite
This report shows the average composite price for paint for up to five years. All data in this report is based on building cost data published by Xactware.

Additional Information:
- Report Contents
- Research and Analysis Overview

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</thead>
<tbody>
<tr>
<td>Paint Composite</td>
<td>207.05</td>
<td>212.79</td>
<td>214.63</td>
<td>216.17</td>
<td>222.51</td>
<td>218.35</td>
<td>219.48</td>
<td>218.43</td>
<td>214.27</td>
<td>211.57</td>
<td>210.32</td>
<td>214.91</td>
<td>216.66</td>
<td>217.03</td>
<td>217.03</td>
<td>217.65</td>
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</tbody>
</table>

This report is based on building cost data published by Xactware for the area selected. The value plotted for each period is the sum of the paint composite pricing from this area. The paint material composite pricing is based on a basket of goods which is comprised of a set of highly used items in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
**Retail Labor Average Cost**

This report shows average costs for retail labor trends for up to five years. All data in this report is based on Xactware published pricing.

Additional Information:
- Report Contents
- Research and Analysis Overview

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</tr>
</thead>
<tbody>
<tr>
<td>Retail Labor</td>
<td>48.82</td>
<td>48.38</td>
<td>48.88</td>
<td>47.70</td>
<td>48.80</td>
<td>49.76</td>
<td>50.48</td>
<td>50.00</td>
<td>51.35</td>
<td>52.45</td>
<td>53.22</td>
<td>53.13</td>
<td>53.40</td>
<td>53.34</td>
<td>53.41</td>
<td>53.41</td>
</tr>
</tbody>
</table>

This report is based on Xactware Published Pricing and contains an average of all Retail Labor Rates for the area selected.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement in the trends is caused as much by the fees included as it is by the prices of those fees. In order to fully identify the cause of the trend, further research and analysis will be needed.
**Retail Labor Breakdown**

This report shows the breakdown of retail labor trends for up to five years. All data in this report is based on Xactware published pricing.

### XactAnalysis > Industry Trend Reports

**REPORT OPTIONS**

- **Report:** Retail Labor
- **Display Report Data From:** 3 Years
- **Project Trend Line From:** None
- **Compare:** None

**Select Location:**

- Canada
- United States

---

### Retail Labor Average Cost

<table>
<thead>
<tr>
<th>Category Name</th>
<th>Labor Overhead</th>
<th>Labor Burden</th>
<th>Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q2 2006</td>
<td>$10.84 (43.2%)</td>
<td>$8.51 (19.2%)</td>
<td>$17.24 (37.4%)</td>
</tr>
<tr>
<td>Q3 2006</td>
<td>$20.52 (43.0%)</td>
<td>$5.00 (19.5%)</td>
<td>$17.24 (37.2%)</td>
</tr>
<tr>
<td>Q4 2006</td>
<td>$20.8 (43.8%)</td>
<td>$5.00 (19.5%)</td>
<td>$17.4 (37.1%)</td>
</tr>
<tr>
<td>Q1 2007</td>
<td>$21.64 (44.9%)</td>
<td>$5.00 (19.5%)</td>
<td>$17.24 (38.5%)</td>
</tr>
<tr>
<td>Q2 2007</td>
<td>$21.52 (44.2%)</td>
<td>$5.00 (19.5%)</td>
<td>$19.03 (37.1%)</td>
</tr>
<tr>
<td>Q3 2007</td>
<td>$22.7 (45.4%)</td>
<td>$5.00 (18.2%)</td>
<td>$19.02 (38.2%)</td>
</tr>
<tr>
<td>Q4 2007</td>
<td>$22.22 (48.0%)</td>
<td>$5.00 (15.5%)</td>
<td>$15.17 (35.5%)</td>
</tr>
<tr>
<td>Q1 2008</td>
<td>$23.67 (49.5%)</td>
<td>$5.00 (17.6%)</td>
<td>$18.17 (35.7%)</td>
</tr>
<tr>
<td>Q2 2008</td>
<td>$24.09 (49.9%)</td>
<td>$5.00 (17.2%)</td>
<td>$18.42 (35.9%)</td>
</tr>
<tr>
<td>Q3 2008</td>
<td>$25.19 (49.0%)</td>
<td>$5.00 (15.5%)</td>
<td>$18.42 (35.5%)</td>
</tr>
<tr>
<td>Q4 2008</td>
<td>$25.67 (48.2%)</td>
<td>$5.91 (18.7%)</td>
<td>$18.83 (35.5%)</td>
</tr>
<tr>
<td>Jan 2009</td>
<td>$25.55 (48.1%)</td>
<td>$5.95 (18.1%)</td>
<td>$18.55 (35.1%)</td>
</tr>
<tr>
<td>Feb 2009</td>
<td>$25.83 (48.4%)</td>
<td>$5.94 (16.7%)</td>
<td>$18.83 (34.9%)</td>
</tr>
<tr>
<td>Mar 2009</td>
<td>$25.78 (49.5%)</td>
<td>$5.95 (16.7%)</td>
<td>$18.83 (34.9%)</td>
</tr>
<tr>
<td>Apr 2009</td>
<td>$25.55 (47.0%)</td>
<td>$5.91 (15.5%)</td>
<td>$18.05 (32.3%)</td>
</tr>
<tr>
<td>May 2009</td>
<td>$25.55 (47.0%)</td>
<td>$5.91 (15.5%)</td>
<td>$18.05 (32.3%)</td>
</tr>
</tbody>
</table>
**Retail Labor by Trade**

This report is based on Xactware published pricing and contains retail labor rates for the area selected by individual trade.

![Graph showing retail labor cost by decade](image)

**Labor Trade:**
- Carpenter - Finish, Trim/Cabinet (CARP-FNC)

**Additional Information:**
- Report Contents
- Research and Analysis Overview

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<tbody>
<tr>
<td>Carpenter - Finish, Trim/Cabinet (CARP-FNC)</td>
<td>48.76</td>
<td>49.24</td>
<td>49.05</td>
<td>49.42</td>
<td>48.96</td>
<td>50.84</td>
<td>50.62</td>
<td>52.04</td>
<td>53.21</td>
<td>52.03</td>
<td>47.74</td>
<td>53.29</td>
<td>55.30</td>
<td>55.30</td>
<td>55.30</td>
<td>55.30</td>
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</tbody>
</table>

This report is based on Xactware Published Pricing and contains Retail Labor Rates for the area selected by individual trade.

This report is intended to be an indicator of trends within the marketplace. In order to fully identify the cause of the trend, further research and analysis will be needed.
**ROOF REPLACEMENT**

This report is based on building cost data published by Xactware for the area selected. It is comprised of a set of items used for a 25-year 3-tab shingle roof replacement including items like drip edge, valley metal, ridge cap, etc.
**ROOFING COMPOSITE**

This report shows the average composite price for roofing for up to five years. All data in this report is based on building cost data published by Xactware.

This report is based on building cost data published by Xactware for the area selected. The value posted for each period is the sum of the roofing composite pricing from this area. The roofing material composite pricing is based on a basket of goods which is comprised of a set of highly used items in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
**SMALL BATHROOM WATER LOSS**

This report shows the unit prices for a sample small bathroom water loss estimate. All data in this report is based on building cost data published by Xactware.

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</thead>
<tbody>
<tr>
<td>Small Bathroom Water Loss</td>
<td>1534.51</td>
<td>1529.91</td>
<td>1553.47</td>
<td>1564.66</td>
<td>1590.29</td>
<td>1622.12</td>
<td>1619.66</td>
<td>1608.57</td>
<td>1619.36</td>
<td>1651.20</td>
<td>1685.57</td>
<td>1687.03</td>
<td>1682.12</td>
<td>1857.11</td>
<td>1660.04</td>
<td>1660.29</td>
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</tbody>
</table>
**Small Hail Loss**

This report shows the unit prices for a sample small hail loss estimate. All data in this report is based on building cost data published by Xactware.

The report contains a graph illustrating the trend of small hail losses in the United States over a specified period. The data is presented in a table showing the unit prices for small hail losses in various quantities.

This report is based on building cost data published by Xactware for the area selected. The “Small Hail Loss Estimate” is comprised of a common set of items used for a small hail loss in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
VANDALISM MACRO
This report shows the unit prices for a sample vandalism macro that includes replacing an entry door, a window, patching some drywall and general clean-up. All data in this report is based on building cost data published by Xactware.

This report is based on building cost data published by Xactware for the area selected. The "Vandalism Macro" is comprised of a common set of items used in a sample vandalism macro in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
**Vinyl Flooring Composite**

This report shows the average composite price for vinyl flooring for up to five years. All data in this report is based on building cost data published by Xactware.

### Specific Trend Analysis:

Q4 2006

At the national level there has been an increase of the cost of resins and other micro ingredients used in the process of manufacturing vinyl flooring products. This increase has been driven mainly by the higher cost of natural gas, petrochemical costs and shortages of raw materials.

### Table: Vinyl Flooring Composite

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</tr>
</thead>
<tbody>
<tr>
<td>Vinyl Flooring Composite</td>
<td>1158.79</td>
<td>1218.12</td>
<td>1262.60</td>
<td>1258.54</td>
<td>1235.89</td>
<td>1260.41</td>
<td>1152.05</td>
<td>1196.26</td>
<td>1162.24</td>
<td>1194.60</td>
<td>1206.05</td>
<td>1277.50</td>
<td>1208.26</td>
<td>1208.28</td>
<td>1208.28</td>
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</tbody>
</table>
**WATER DAMAGE MITIGATION ESTIMATE**

This report shows the trend for water mitigation item pricing for up to five years. All data in this report is based on building cost data published by Xactware.

---

This report is based on building cost data published by Xactware for the area selected. The "Water Damage Mitigation Estimate" is comprised of a common set of items used in water damage mitigation in various quantities.

This report is intended to be an indicator of trends within the market. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the causes of the trend, further research and analysis will be needed.
WOOD FLOOR REFINISH MACRO

This report shows the unit prices for items used in a typical wood flooring refinish macro. All data in this report is based on building cost data published by Xactware.

Here is a table showing the unit prices for the wood floor refinish macro over different quarters:

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</thead>
<tbody>
<tr>
<td>Wood Floor Refinish Macro</td>
<td>818.90</td>
<td>823.22</td>
<td>828.76</td>
<td>843.39</td>
<td>857.74</td>
<td>865.55</td>
<td>870.17</td>
<td>855.95</td>
<td>850.07</td>
<td>859.10</td>
<td>811.85</td>
<td>914.34</td>
<td>915.83</td>
<td>916.51</td>
<td>915.59</td>
<td></td>
</tr>
</tbody>
</table>

This report is based on building cost data published by Xactware for the area selected. The "Wood Floor Refinish Macro" is compiled of a common set of items used in a typical wood floor refinish macro in various quantities.

This report is intended to be an indicator of trends within the marketplace. As with all composite reports, movement within the trends is caused as much by the items included as it is by the prices of those items. In order to fully identify the cause of the trend, further research and analysis will be needed.
INTRODUCTION
This appendix defines the rules you can select from the Personal Rules (page 87). The Personal Rules module allows you to set up your own notification, so that XactAnalysis will notify you when a service provider triggers "red flags" (or personal rules) you set up yourself.

Note: Not all personal rules can be seen from every carrier.

This appendix defines personal rules for the following categories:

- Price List Item Usage (page 297)
- Assignment Tracking (page 298)
- Estimate Dollar Value (page 303)
- Estimate Scope Overlap and Item Inclusion (page 304)
- Changes to Price List Items (page 308)
- Price List Items by Quality (page 310)
- Industry Trend (page 311)
- Reinspections (page 314)
**PRICE LIST ITEM USAGE**

**NOT IN PRICE LIST**
The Not in Price List rule is the only rule you can choose from the Price List Item Usage category. This rule allows you to track instances of miscellaneous items appearing in the uploaded estimate that don’t exist in the checkpoint price list.

You must select a sender (if required) and a data set before you can select your category and notification. You can then filter these assignments by type, cat code, frequency (whether you want XactAnalysis to review each assignment or to review the monthly cached reports), percent and type of deviation, and (depending on the sender/data set) location and desk adjuster.

![Image of XactAnalysis setup window](image-url)
Assignment Tracking

The Assignment Tracking category allows you to track assignments based on a number of factors, such as assignment status (Assignment Cancelled, Assignment Delivered, Customer Contacted), labor efficiencies (broken out, factored in), and Sketch (Estimate with Sketch, Estimate with No Sketch).

You must select a sender (if required) and a data set before you can select your category and notification. You can then filter any of these assignments by priority, type, cat code, zero-dollar, and (depending on the sender/data set) location and desk adjuster.

![Event to escalate]

**Action Items Created**
This personal rule allows you to be notified if an action item was created.

**Assignment Cancelled**
This personal rule allows you to track assignments that have been cancelled.

**Assignment Delivered**
This personal rule allows you to track assignments that have been delivered.

**Assignment Documents Received**
This personal rule allows you to track assignments whose documents have been received.

**Assignment Received**
This personal rule allows you to be notified when XactAnalysis receives a new assignment.

**Assignment Rejected**
This personal rule allows you to track assignments that have been rejected.

**Assignment Reviewed**
This personal rule allows you to track assignments that have been reviewed.
Assignment Reviewed with Exceptions
This personal rule allows you to track assignments that have been reviewed with exceptions.

Assignment is Client Approved
This personal rule allows you to track assignments with a client who has approved the assignment.

Assignment is Client Rejected
This personal rule allows you to track assignments with a client who has rejected the assignment.

Assignment is QA Approved
This personal rule allows you to track assignments that QA has approved.

Assignment is QA Rejected
This personal rule allows you to track assignments that QA has rejected.

You cannot filter these assignments by priority, type, or cat code.

Attention Needed
This personal rule allows you to track assignments that need attention.

Bid Item
This personal rule notifies you when an estimate contains one or more bid item with a dollar amount beyond the perimeters you set.

Claim Rep Notified
This personal rule notifies you when the first assignment notification is sent out to the contractor/adjuster.

Corrected Estimate Uploaded
This personal rule allows you to track assignments with corrected estimates that have been uploaded.

Customer Contacted
This personal rule allows you to track assignments with customers who have been contacted.

Desk Adjuster Reassigned
This personal rule allows you to be notified if a desk adjuster is reassigned an assignment.

Desk Adjuster Removed
This personal rule allows you to be notified if a desk adjuster is removed from an assignment.

Estimate with Depreciation
This personal rule allows you to be notified if a claim is over or under ‘X’ dollars, with or without depreciation.

Estimate with High Value Contents Item
This personal rule notifies you when an estimate is uploaded and has at least one contents item that exceeds the dollar amount you defined.

Estimate with No Depreciation
This personal rule allows you to track assignments with line items that were not depreciated.

Estimate with No Overhead and Profit
This personal rule allows you to track assignments that have trades with no overhead and/or profit. The default is for XactAnalysis to track all trades in an estimate where the O&P is zero, but you can specify trades you want to track.
In addition to the standard Assignment Tracking filters, you must also select the range of trades you want red flagged (greater than or less than a particular number), then click the **Selected Trades SmartList button** to select the trades you want this rule applied to.

**ESTIMATE WITH NO PHOTOS**
This personal rule allows you to track assignments that do not have any photo attached.

**ESTIMATE WITH NO SKETCH**
This personal rule allows you to track assignments with line items that have not been sketched.

**ESTIMATE WITH NO TAX**
This personal rule allows you to be notified when an estimate is uploaded with no tax.

**ESTIMATE WITH OVERHEAD AND PROFIT**
This personal rule allows you to track assignments that have trades with overhead and/or profit. The default is for XactAnalysis to track all trades in an estimate that have O&P but you can specify trades that you want to track.

In addition to the standard Assignment Tracking filters, you must also select the range of trades you want red flagged (greater than or less than a particular number), then click the **Selected Trades SmartList button** to select the trades you want this rule applied to.

**ESTIMATE WITH SKETCH**
This personal rule allows you to track assignments with a sketch attached.

**FILE CLOSED**
This personal rule allows you to track assignments with a file that has been closed.

**FILE REOPENED**
This personal rule allows you to track assignments with a file that has been re-opened.

**FIRST REPORT UPLOADED**
This personal rule allows you to track assignments whose first reports have been uploaded.

**FLOORING ANALYSIS REPORT UPLOADED**
This personal rule allows you to track assignments whose Flooring Analysis reports have been uploaded.

**IMAGE UPLOADED TO ESTIMATE**
This personal rule allows you to track assignments with uploaded images.

**INDEPENDENT ANALYSIS REPORT UPLOADED**
This personal rule allows you to track assignments whose Independent Analysis reports have been uploaded.

**JOB COMPLETED**
This personal rule allows you to track assignments whose job has been marked *Complete*.

**JOB NOT SOLD**
This personal rule allows you to track assignments whose job has been marked *Not Sold*.

**JOB STARTED**
This personal rule allows you to track assignments whose job has been marked *Started*.
**LABOR EFFICIENCY—BROKEN OUT**
This personal rule allows you to track assignments with its labor efficiency broken out.

**LABOR EFFICIENCY—FACTORED IN**
This personal rule allows you to track assignments with its labor efficiency factored in.

**LABOR EFFICIENCY—NEW CONSTRUCTION**
This personal rule allows you to track assignments with its labor efficiency marked as *New Construction*.

**LABOR EFFICIENCY—NOT APPLIED**
This personal rule allows you to track assignments with unapplied labor efficiency.

**MISC LINE ITEM LUMP SUM**
This personal rule allows you to be notified if an estimate has a MISC line item that exceeds ‘X’ dollars.

**MARKET CONDITIONS LUMP SUM**
This personal rule allows you to be notified if market conditions for a line item in an estimate are greater than or equal to 66.67% of the item price.

**MITIGATION REVIEW—ATTENTION NEEDED**
This personal rule allows you to track assignments where attention is needed on a Mitigation Review.

**MITIGATION REVIEW—REPORT UPLOADED**
This personal rule allows you to track assignments that have a report uploaded on a Mitigation Review.

**NEW ASSIGNMENT IN QUEUE**
This personal rule allows you to track new assignments in the queue.

**NOTE ADDED TO ASSIGNMENT**
This personal rule allows you to track assignments with notes attached.

**ORIGINAL ESTIMATE UPLOADED**
This personal rule allows you to track assignments whose original estimate has been uploaded to XactAnalysis.

**PHOTO SHEET REPORT UPLOADED**
This personal rule allows you to track assignments with a Photo Sheet Report that have been uploaded.

**REASSIGNED**
This personal rule allows you to track assignments that have been re-assigned.

**RESERVE AMOUNT**
This personal rule allows you to track assignments whose reserve amount has been met.

**SITE INSPECTED**
This personal rule allows you to track assignments whose site has been inspected.

**UNDERWRITING CHECKLIST REPORT UPLOADED**
This personal rule allows you to track assignments with an Underwriting Checklist report that has been uploaded.
**XactCentral File Completed**
This personal rule allows you to track assignments where the XactCentral File has been marked *Complete*. This rule only applies to Xactimate v.24 and lower.

**XactCentral File In-Progress**
This personal rule allows you to track assignments where the XactCentral File has been marked *In-Progress*. This rule only applies to Xactimate v.24 and lower.
**ESTIMATE DOLLAR VALUE**
The Estimate Dollar Value category allows you to set up XactAnalysis to notify you when estimates come in above or below specific dollar amounts.

You must select a sender (if required) and a data set before you can select your category and notification. You can then filter these assignments by type, cat code, frequency, and (depending on the sender/data set) location and desk adjuster.

**ESTIMATE VALUE**
This rule allows you to set up XactAnalysis to notify you when estimates come in above or below specific dollar amounts.

**CORRECTED ESTIMATE VALUE**
This rule allows you to set up XactAnalysis to notify you when corrected estimates come in above or below specific dollar amounts.
**ESTIMATE SCOPE OVERLAP AND ITEM INCLUSION**
The Estimate Scope Overlap and Item Inclusion category allows you to be notified if the rules of the Estimate Inclusion Issues and the Estimate Scoping Overlap reports have been broken.

You must select a sender (if required) and a data set before you can select your category and notification. You can then filter these assignments by type, cat code, frequency (whether you want XactAnalysis to review each assignment or to review the monthly cached reports), whether the rule was deviated by too much or too little, percent of deviation, and (depending on the sender/data set) location and desk adjuster.

**ANY RULE IN THIS GROUP**
This rule notifies you of any rules in the Estimate Scope Overlap and Item Inclusion being broken.

**BASE TRIM RULE BROKEN**
This rule notifies you of any case where the lineal footage of base trim in an assignment is greater than the total lineal footage of walls.

**BASEBOARD RULE BROKEN**
This rule notifies you of any case where the total lineal footage of base shoe molding is greater than the total lineal footage of perimeter walls.

**CABINETS RULE BROKEN**
This rule notifies you of any case where the total lineal footage of wall and full height cabinets or the total lineal footage of base and full height cabinets is greater than the lineal footage of the walls in a room.

**CEILING TILE RULE BROKEN**
This rule notifies you of any case where the total square footage of acoustic ceiling tile is greater than the square footage of the ceiling in a room.
**Chair Rail Rule Broken**
This rule notifies you of any case where the lineal footage of chair rail is greater than the total lineal footage of wall perimeter in a room.

**Contents Rule Broken**
This rule notifies you of any case where more than 1 contents manipulation charge occurs in a room.

**Crown Molding Rule Broken**
This rule notifies you of any case where the lineal footage of ceiling trim is greater than the total lineal footage of ceiling perimeter in a room.

**Door Hardware (Hinges) Rule Broken**
This rule notifies you of any case where common pre-hung doors are found in the same room with separate listings for hinges.

**Door Hardware (Removal) Rule Broken**
This rule notifies you of any case where doors are listed for removal in the same room where door hardware (which should come off with the door without added effort) is also listed for removal.

**Drywall/Plaster Rule Broken**
This rule notifies you of any case where the total square footage of finished drywall, drywall texture, and/or plaster is greater than the square footage of the walls and ceilings in a room.

**Drywall/Wallpaper Rule Broken**
This rule notifies you of any case where wallpaper is removed from drywall which is also listed as removed (wallpaper should come off with drywall without additional effort).

**Duplicate Minimums Rule Broken**
This rule notifies you of any case where multiple “Minimum Charge” items which use the same labor code exist in the estimate.

**Exterior Door & Lockset Rule Broken**
This rule notifies you of any case where the number of exterior doors does not match the number of exterior locksets.

**Exterior Lockset & Deadbolt Rule Broken**
This rule notifies you of any case where an “exterior lockset” or “deadbolt” and an “exterior lockset with deadbolt” are present in this room.

**Flooring Removal Rule Broken**
This rule notifies you of any case where flooring waste is included in the removal quantity (no need to remove waste material—applies to replace/installation only).

**Flooring Rule Broken**
This rule notifies you of any of the following cases:

- the total square footage of vinyl tile, stone, ceramic, or slate tile, and wood flooring in a room is greater than the square footage of flooring. These items are estimated, and sold on a square foot basis, and include waste within the line item price.

- the total square footage of carpet and/or vinyl sheet goods found in a room is greater than the total square footage of floor area * 1.15 (15% greater than room size). The industry standard for estimating with flooring which is purchased off a “roll” is to account for waste by increasing the quantity of the item. The
percentage of increased quantity should vary depending on room size, shape, and complexity of any patterns in the flooring. And while in some cases needs to exceed 15%, this is just a general guideline.

- the waste for sheet good items (carpet and vinyl) exceeds 15% in rooms where a combination of sheet good and square foot flooring items are used.

**Interior Door & Lockset Rule Broken**
This rule notifies you of any case where the number of interior doors does not match the number of interior locksets.

**Pocket Door & Lockset Rule Broken**
This rule notifies you of any case where the number of interior doors does not match the number of interior locksets.

**Remove Sink & Hardware Rule Broken**
This rule notifies you of any case where removing a faucet and/or garbage disposer is used in the same room as removing a sink (removing faucet and disposer take no additional effort).

**Remove Toilet & Seat Rule Broken**
This rule notifies you of any case where removing a toilet is used in the same room as removing a toilet seat (removing toilet seat takes no additional effort).

**Reset Doors & Hardware Rule Broken**
This rule notifies you of any case where detaching and resetting a door is used in the same room as detaching and resetting any type of hardware mounted to the door (resetting door hardware takes no additional effort).

**Reset Interior Trim Rule Broken**
This rule notifies you of any case where total LF of staining and finishing trim, plus the resetting of trim exceeds the room's LF perimeter (PF) measurement.

**Reset Light Fixtures Rule Broken**
This rule notifies you of any case where detaching and resetting a hanging or recessed light fixture and/or ceiling fan has been used in conjunction with painting of the ceiling.

**Reset Sink & Hardware Rule Broken**
This rule notifies you of any case where detaching and resetting a faucet is used in the same room as detaching and resetting a sink (these processes should be combined as they take no additional effort).

**Reset Toilet & Seat Rule Broken**
This rule notifies you of any case where detaching and resetting a toilet is used in the same room as detaching and resetting a toilet seat (resetting toilet seat takes no additional effort).

**Roof Felt Overlap Rule Broken**
This rule notifies you of any case where roof covering is included and roofing felt is also included.

**Roofing Rule Broken**
This rule notifies you of any case where roof covering waste is included in the quantity of roof covering to be removed (waste material applies to replace/installation only).

**Room Size Rule Broken**
This rule notifies you of any case where it appears the user probably included an additional digit in a dimensioning field (e.g., 110’ instead of 11’).
**SEAL & PAINT RULE BROKEN**
This rule notifies you of any case where the total square footage of separate seal and paint line items combined with line items containing both seal and paint exceeds the area of the walls and ceilings in the room.

**TOP RAIL RULE BROKEN**
This rule notifies you of any case where the amount of chain link fence top rail exactly matches the amount of chain link fence since chain link fencing already includes top rail.

**UNDERLAYMENT RULE BROKEN**
This rule notifies you of any case where the total square footage of underlayment is greater than the square footage of floors in a room.

**WALL COVERING REMOVAL RULE BROKEN**
This rule notifies you of any case where the quantity for the additional charge to remove non-strippable wallpaper exceeds the quantity of wallpaper being removed.

**WALL COVERING RULE BROKEN**
This rule notifies you of any case where the total square footage of wall coverings such as wallpaper, paneling, wall tile, and painting is greater than the square footage of the walls and ceilings in a room.
Changes to Price List Items

The Changes to Price List Items category allows you to track the changes that estimators/adjusters are making to an assignments’ price list items.

You must select a sender (if required) and a data set before you can select your category and notification. You can then filter these assignments by type, cat code, frequency (whether you want XactAnalysis to review each assignment or to review the monthly cached reports), percent and type of deviation (only the line item price deviation is a deviation rule), and (depending on the sender/data set) location and desk adjuster.

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Any Rule in this Group
This rule alerts you when any Changes to Price List Items rules are broken.

Basic Variation
This rule notifies you of a variation where a price list item with a non $0.00 value has a price/description change.

Line Item Price Deviation
This rule notifies you when line items in an estimate deviate from the checkpoint price list by a specific percent.

NFCP
This rule notifies you of a variation of an NFCP item in an estimate. (As these items have $0.00 material components users are expected to change the price for them.)

Not in the Price List Variation
This rule notifies you of a variation resulting from using a USR, MISC, or other item that does not exist in the price list. (Often these are encountered in contents settings where MISC items are commonly added.)
**PERCENT OF ITEMS WITH ALL CHANGED**
This rule notifies you when the total percentage of line items with changes in all categories exceeds or is less than the specified percent.

**PERCENT OF ITEMS WITH DESCRIPTION & UNIT**
This rule notifies you when the total percentage of line items with changes to both the line item description and unit exceeds or is less than the specified percent.

**PERCENT OF ITEMS WITH DESCRIPTION CHANGED**
This rule notifies you when the total percentage of line items with changes to the description exceeds or is less than the specified percent.

**PERCENT OF ITEMS WITH NO CHANGE**
This rule notifies you when the total percentage of line items with no changes exceeds or is less than the specified percent.

**PERCENT OF ITEMS WITH PRICE & DESCRIPTION**
This rule notifies you when the total percentage of line items with changes to both the line item price and description exceeds or is less than the specified percent.

**PERCENT OF ITEMS WITH PRICE & UNIT**
This rule notifies you when the total percentage of line items with changes to both the line item price and unit exceeds or is less than the specified percent.

**PERCENT OF ITEMS WITH PRICE CHANGED**
This rule notifies you when the total percentage of line items with changes to the line item price exceeds or is less than the specified percent.

**PERCENT OF ITEMS WITH UNIT CHANGED**
This rule notifies you when the total percentage of line items with changes to the line item unit exceeds or is less than the specified percent.

**ZERO DOLLAR ITEMS VARIATION**
This rule notifies you of any variation resulting from a user entering a price of an item that exists in the price list at $0.00. (Some examples of these are bid only items, CAS and PER categories as well as some other items.)
**Price List Items by Quality**

The Price List Items by Quality rules allow you to set up rules that alert you when estimate line item qualities exceed or are less than a specified percent.

You must select a sender (if required) and a data set before you can select your category and notification. You can then filter any of these data sets by type, cat code, frequency (whether you want XactAnalysis to review each assignment or to review the monthly cached reports) percentage, zero-dollar, and (depending on the sender/data set) location.

**ANY RULE IN THIS GROUP**

This rule alerts you when any *Price List Items By Quality* rules are broken.

**Percent of Average Quality Items**

This rule alerts you when the percent of average quality items in an estimate exceeds or is less than the specified percent.

**Percent of High Quality Items**

This rule alerts you when the percent of high quality items in an estimate exceeds or is less than the specified percent.

**Percent of Low Quality Items**

This rule alerts you when the percent of low quality items in an estimate exceeds or is less than the specified percent.

**Percent of Premium Quality Items**

This rule alerts you when the percent of premium quality items in an estimate exceeds or is less than the specified percent.
**INDUSTRY TREND**

The Industry Trend rules allow you to set up rules that alert you when one or more Industry Trend reports increase or decrease from the previous quarter by a pre-determined percent or amount.

You must select a sender (if required) and a data set before you can select your category and notification. You can then filter any of these reports by whether the report is increased or decreased, the amount or percent of the change, location (depending on the sender/data set), and desk adjuster.

**ANY RULE IN THIS GROUP**

This rule alerts you when the values of any Industry Trend report in this group increase or decrease by a pre-selected amount or percent.

**AVERAGE ESTIMATE VALUE**

This rule alerts you when the values of the quarterly Average Estimate Value report increase or decrease by a pre-selected amount or percent.

**BASKET OF GOODS LABOR & MATERIALS**

This rule alerts you when the values of the quarterly Basket of Goods Labor & Materials report increase or decrease by a pre-selected amount or percent.

**BASKET OF GOODS MATERIALS ONLY**

This rule alerts you when the values of the quarterly Basket of Goods Materials Only report increase or decrease by a pre-selected amount or percent.

**CARPET COMPOSITE**

This rule alerts you when the values of the quarterly Carpet Composite report increase or decrease by a pre-selected amount or percent.
CARPET REPLACEMENT MACRO
This rule alerts you when the values of the quarterly Carpet Replacement Macro report increase or decrease by a pre-selected amount or percent.

DOOR REPLACEMENT MACRO
This rule alerts you when the values of the quarterly Door Replacement Macro report increase or decrease by a pre-selected amount or percent.

DRYWALL COMPOSITE
This rule alerts you when the values of the quarterly Drywall Composite report increase or decrease by a pre-selected amount or percent.

GARAGE DOOR MACRO
This rule alerts you when the values of the quarterly Garage Door Macro report increase or decrease by a pre-selected amount or percent.

INTERIOR TRIM/MOLDINGS COMPOSITE
This rule alerts you when the values of the quarterly Interior Trim/Moldings Composite report increase or decrease by a pre-selected amount or percent.

KITCHEN SMOKE DAMAGE
This rule alerts you when the values of the quarterly Kitchen Smoke Damage report increase or decrease by a pre-selected amount or percent.

LUMBER COMPOSITE
This rule alerts you when the values of the quarterly Lumber Composite report increase or decrease by a pre-selected amount or percent.

PAINT COMPOSITE
This rule alerts you when the values of the quarterly Paint Composite report increase or decrease by a pre-selected amount or percent.

QUARTERLY PRICE LIST CHANGES REPORT UPDATED
This rule alerts you when the values of the quarterly Quarterly Price List Changes Report Update increase or decrease by a pre-selected amount or percent.

RETAIL LABOR
This rule alerts you when the values of the quarterly Retail Labor report increase or decrease by a pre-selected amount or percent.

RETAIL LABOR BY TRADE
This rule alerts you when the values of the quarterly Retail Labor by Trade report increase or decrease by a pre-selected amount or percent.

ROOFING COMPOSITE
This rule alerts you when the values of the quarterly Roofing Composite report increase or decrease by a pre-selected amount or percent.

SMALL BATHROOM WATER LOSS
This rule alerts you when the values of the quarterly Small Bathroom Water Loss report increase or decrease by a pre-selected amount or percent.
**SMALL HAIL LOSS**
This rule alerts you when the values of the quarterly Small Hail Loss report increase or decrease by a pre-selected amount or percent.

**VANDALISM MACRO**
This rule alerts you when the values of the quarterly Vandalism Macro report increase or decrease by a pre-selected amount or percent.

**VINYL FLOORING COMPOSITE**
This rule alerts you when the values of the quarterly Vinyl Flooring Composite report increase or decrease by a pre-selected amount or percent.

**WATER DAMAGE MITIGATION ESTIMATE**
This rule alerts you when the values of the quarterly Water Damage Mitigation Estimate report increase or decrease by a pre-selected amount or percent.

**WOOD FLOOR REFINISH MACRO**
This rule alerts you when the values of the quarterly Woof Floor Refinish Macro report increase or decrease by a pre-selected amount or percent.
The Reinspection rules allow you to set up rules that alert you when an assignment has changed status in the Reinspection Queue.

**REINSPECTION ACCEPTED**
This rule alerts you when a reinspection is accepted in the Reinspection queue.

**REINSPECTION ASSIGNED**
This rule alerts you when a reinspection is assigned in the Reinspection queue.

**REINSPECTION COMPLETED**
This rule alerts you when a reinspection is completed in the Reinspection queue.

**REINSPECTION REJECTED**
This rule alerts you when a reinspection is rejected in the Reinspection queue.
INTRODUCTION
This appendix identifies the XactAnalysis user interface changes that occurred with the June 2010 update. The images provided in this document are generic screenshots, and the interface may vary slightly for your company.

Note: Features marked with an asterisk (*) can be enabled for your version of XactAnalysis by notifying your account representative.

- Collaboration Admin Application Right* (page 316)
- Referral Assignments in XactAnalysis* (page 317)
- Competition Bid Assignment Type* (page 318)
- Display User Name for Documents and Photos* (page 319)
- Cause of Loss* (page 320)
- Read-Only User Access (page 321)
- AutoComplete XactNet Addresses (page 322)
- Multiple CAT Codes (page 323)
- Multiple ZIP/Postal Codes (page 324)
- Company Code Filter* (page 325)
- Descriptions added to Review Queue Rules* (page 326)
- Action Item User Right* (page 327)
- XactAnalysis Management Reports Enhancements (page 328)
COLLABORATION ADMIN APPLICATION RIGHT

A Collaboration Admin application right (page 29) has been added to control which users have access to assign collaborations (see "Assigning a collaborator" on page 124). Users without this right will only be able to view the collaboration statuses.
Referral assignments can be sent from XactAnalysis now, as well as from Xactimate. Create Referral Assignment is an option in the Assignment Details (page 105) you can select from the Action drop-down button. You can refer a completed estimate along with its documents, images, and sketches to the specific referral program. For the referral company workflow, XactAnalysis referral assignments and Xactimate referral assignments are the same.
**Competition Bid Assignment Type**

A new assignment type called *Competition Bid* allows you to send assignments ("Send Work Assignment" on page 131) as either a structural or a competition bid assignment. You can send competition bid assignments for the same job to multiple contractors, who then complete and upload the estimate for their competition bids. This allows you to receive multiple competitive estimates for the same job. The Assignment Type filter in *Advanced Search* (page 102) allows you to separate the data by structural and bid assignments. The competition bid estimates are not included in management reports or industry data.
**DISPLAY USER NAME FOR DOCUMENTS AND PHOTOS**

In the Activity Log (page 116), the XactAnalysis user name appears with the photos and documents the user uploaded through XactAnalysis.
**Cause of Loss**

A *Cause of Loss* drop-down field appears on the *Send Work Assignment* page (page 131) and on the *Client Policy* tab (page 106) in Assignment Details. You can define a custom set of cause-of-loss descriptions for each type of loss per data set.
**READ-ONLY USER ACCESS**

A Read-Only application right ([page 29](#)) has been created in *User Administration* ([page 20](#)). This right restricts users to a read-only view of assignment data. Users with this application right enabled cannot:

- Create assignments
- Add notes, action items, documents, or photos
- Create program rules or personal rules
- Edit qualifications
- Make any changes to users, user roles, hierarchies, qualifications
- Assign, reassign, cancel, or make any status changes
- Mark assignments read/unread
- Edit CAT code or claim number
- Approve or reject documents, photos, or sketches
- Email assignments
- Assign or complete estimate reviews
- Create queue rules
- XactAnalysis Address Book export
- Advanced Search or details export
AutoComplete XactNet Addresses

AutoComplete functionality has been added to the XactNet Address fields throughout XactAnalysis, such as in Advanced Search (page 102), Management Reports (page 156), Personal (page 87) and Program Rules (page 79), and the Review Queue filter (page 143) and rules (page 140).
MULTIPLE CAT CODES
You can enter multiple CAT codes in the Advanced Search (page 102) using a comma-delimited list.
MULTIPLE ZIP/POSTAL CODES
You can enter multiple ZIP/postal codes in the Advanced Search (page 102) and Welcome Page Quick Search (page 17) using a comma delimited list.
**COMPANY CODE FILTER**

Companies sending assignments via EDI can pass an alpha-numeric “Company Code” XML attribute. XactAnalysis uses the company code to fill out a drop-down list in Management Reports (page 156) for report filtering. This attribute allows you to report on different business lines or units within a data set.
**Descriptions added to Review Queue Rules**
The Review Queue Rules page (page 140) has been separated into the three categories to help you easily distinguish the conditions needed to trigger a rule: *All Required, One Required*, and *Other*. 
**Action Item User Right**

An application right (page 29) called *Edit Action Items* allows you to set up users who can create, edit, and complete action items (page 107). Without this right, a user can only view the Action Items tab and cannot make changes to it.
**XactAnalysis Management Reports Enhancements**

**REPORT ITEM DETAILS**
The following three reports contain a link called *Report Items* next to each category to show supporting selector item details for each category:

- Estimate Flooring Usage (page 220)
- Estimate Roofing Usage (page 230)
- Estimate Siding Usage (page 237)
**PAYMENT TRACKER REPORT**

The new *Payment Tracker Report* shows Xactimate Payment Tracker information from uploaded estimates. This management report (page 156) shows information such as paid amounts, number of payments made, recoverable and nonrecoverable depreciation, and remaining payable amounts.

![Payment Tracker Report](image)

<table>
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<tr>
<th>Region</th>
<th>Estimates</th>
<th>Total Estimate Value</th>
<th>Total Num Items</th>
<th>Average Num Line Items</th>
<th>Total Num Line Items</th>
<th>Average Estimate Value</th>
<th>Total Structural Paid</th>
<th>ALE Paid</th>
<th>Total Paid</th>
<th>Total Recoverable</th>
<th>Total Non Recoverable</th>
<th>Num Payments Issued</th>
<th>Num Item Overrides</th>
<th>Item Override Amount</th>
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<td>6</td>
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</tr>
</tbody>
</table>
COLLABORATION ACTIVITY REPORT*

The new Collaboration Activity Report displays assignments that were collaborated on and displays the changes made during collaboration. This activity report (page 156) contains the following columns:

- Hierarchy Level
- Total Estimates
- Total Collaborated
- Number of Collaborations Currently Assigned
- Number of Collaborations Returned
- Average Collaboration Days
- Total Estimate Amount
- Total Corrected Amount
- % of Collaborated Estimates
- $ Difference (Overall)
- $ Difference (Up)
- $ Difference (Down)

### Collaboration Summary

<table>
<thead>
<tr>
<th>State</th>
<th>Total Estimates</th>
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<th># Returned</th>
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<td>2,040,791</td>
<td>82.166</td>
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<td>$-4,187</td>
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</table>

**Totals:**

| 868   | 808             | 347                | 347      | 1         | 1.4                     | $6,039,558     | $1,575,170        | $757,612             | $1,427,620        | $552,008          |
TRANSACTION COUNTS EXCEL REPORT
The Transaction Counts Management Report (page 156) shows the number of billable transactions by data set throughout the year. At the top of the report, the count of each of your company's billable transactions are displayed per data set.

- Cancelled
- Collaborated
- Custom Doc Exported
- Reassigned
- Returned
- Status Export

The next section of the report shows each assignment, and the billable transactions that correspond to that assignment. In addition to the billable transactions that are turned on for your company, the following columns appear if they are billable:

- Claim Number
- Policy Number
- Insured Name
- Type of Loss
- Date of Loss
- CAT Code
- Cancelled
- Collaborated
- Custom Doc Exported
- Estimate Exported
- Reassigned
- Returned
- Status Export

### Transaction Counts

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### Transaction Counts

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<th>Date of Loss</th>
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<th>Collaborated</th>
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<th>Estimate Exported</th>
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