

**KPI – Clients By Staffer**

COATS Metrics – Key Clients

Staffers

Staffer Contacts

Staffer Name	Client Name	Total	CON	Region	Branch	CON Future	ACC	Terminals	New Starts	Net Change	% Change	Emp_Need	Emp Have	Still Need	Submittals	INTV	Apps
DAWN		1	1			0	0	0	0	0	0	0	0	0	0	0	0
DEMO		6	6			0	0	0	0	0	0	0	0	0	0	1	0
KAREN		474	436			0	0	38	7	-31	2.78	134	56	78	4	3	16
KAREN	21ST REMODELING, INC.	248	213	EAST COAST	VA Beach	0	0	35	3	-32	0.00	21	7	14	1	3	16
KAREN	711 MANUFACTURING	3	3	WEST COAST	Phoenix	0	0	0	0	0	0.00	0	0	0	0	3	16
KAREN	7ELEVEN	19	18	EAST COAST	VA Beach	0	0	1	0	-1	0.00	11	7	4	1	3	16
KAREN	ABC CATERING SERVICES	6	6	EAST COAST	EASTON	0	0	0	0	0	0.00	3	1	2	0	3	16
KAREN	ABC CONSTRUCTION	5	5	EAST COAST	VA Beach	0	0	0	0	0	0.00	0	0	0	0	3	16
KAREN	ALTOID MINTS	8	8	EAST COAST	VA Beach	0	0	0	0	0	0.00	0	0	0	0	3	16
KAREN	AMAZON	4	4	EAST COAST	EASTON	0	0	0	0	0	0.00	4	4	0	0	3	16
KAREN	APPLE STORE	1	1	EAST COAST	EASTON	0	0	0	0	0	0.00	0	0	0	0	3	16
KAREN	ARTIC	2	2	EAST COAST	EASTON	0	0	0	0	0	0.00	0	0	0	0	3	16
KAREN	AUTOMARK SERVICES	60	59	WEST COAST	San Diego	0	0	1	0	-1	0.00	4	0	4	0	3	16
KAREN	BEAUTY PRODUCTIONS	3	3	EAST COAST	VA Beach	0	0	0	0	0	0.00	0	0	0	0	3	16
KAREN	BLUE COAST COMPANY	10	10	EAST COAST	EASTON	0	0	0	0	0	0.00	10	0	10	0	3	16
		482	444			0	0	38	7	-31	2.5	134	56	78	4		

Record 4 of 40

Select Date Range

1/1/202212/31/2022

Key Clients

Key Staffers

Staffers Contacts

Create XLSX File

**SITUATION:** The agency would like to see Dashboard of Client by Staffer to include activity based on Assignments, Jobs, Turnover, Submittals, Interviews, Application Downloads, etc.

This allows the user to pick by Staffer, where the Staffer name is attached to the assignment, the Master Record INTV initials and from the Employee CONTACT where an application has been downloaded.

**STEPS:****I. Give user(s) access to KPI Reports.**

1. Open **COATS**
2. Click **Maintenance**
3. Click **Branches**
4. Click **Users**
5. Find User
6. Click **Edit Security Profile**
7. Click **Reports**
8. Check **KPI Reports**.
9. Repeat for each user.

**II. Pulling the data from Clients based on all Staffers.**

1. Open **COATS**.
2. Click **Reports**.
3. Click **KPI Reports**.
4. Click **KPI Clients by Staffer**
5. Click **Clients** tab.
6. Click **Select Date Range** to select desired date range.
7. Click **KPI Clients by Staffer**.
8. This data is pulled by the **STAFFER** attached to the employee's assignment. Depending on the date range and user view

9. Online application download comments. Depending on the date range and user view, the following data will appear. Below each column is defined.

**Staffer Name** – Name of Staffer attached to employee assignments, the user can click on the + to the left of the Staffer name to drill into the staffer to see the attached client data.

**Client Name** - Client Name, shows when the user had drilled into the staffer name.

**Region** – Client Region, shows when the user had drilled into the staffer name.

**Branch** – Client Branch, shows when the user had drilled into the staffer name.

**Total** – Total of CON + Terminated (FIN, NER, T/H, D/H) within date range; used to capture % change.

**CON** – All assignments with a Confirmed status regardless of date range regardless of Job Order Status.

**CON Future** – All assignment with a Confirmed status **after** the end date of the date range.

**ACC** - All assignments with an Accepted status within date range.

**Terminated**- All assignments with a FIN, NER, T/H or D/H status with an end date within date range.

**New Starts** – All assignments with a Confirmed status, with a start date within date range.

**Net Change** - New Starts - Terminated

**% Change** – Net Change/ Total

**Emp\_Need** – Total number of employees needed (This # is pulled from the **Employees** field from the Order template) from only Open, Re-Opened or Pending Orders, regardless of date range.

**Emp Have**– Total number of employees CON from only Open, Re-Opened or Pending Orders, regardless of date range based on the Staff name in the Assignments.

**Still Need** – Total number of employees Still needed (This is the **Employee Need – Employee Have = Still Need**) from only Open, Re-Opened or Pending Orders, regardless of date range.

**Submittals** – Employees with a status change of ACC, PEN, INTV or CREJ contact note dated within date range counts as a submittal. The date is based on when the staffer clicked ACC, PEN, INTV, or CREJ, not on the assignment start date.

**INTV** – # of times the staffer name initials appear within the date range within an Employee Master Record/Interview screen.

**Apps** - # of times the staffer name initials appear within the date range within an Employee Master Record/Contact Screen, where the note “Applied Online” appears.