

**KPI – Staffer Contacts**

COATS Metrics -- Key Clients

ClientsStaffersStaffer Contacts

Staffer

Staffer	Employee	Staff#	Emp#	Avl	Out	Email	Text	Jobs	Manual	
MR. FRANK J JAMES					(Avl: =1)	(Out: SUM=0)	(Email: SUM=0)	(Text: =0)	(Jobs: SUM=0)	(Manual: SUM=0)
MS. KAREN A CONNOR					(Avl: =40)	(Out: SUM=19)	(Email: SUM=142)	(Text: =327)	(Jobs: SUM=105)	(Manual: SUM=1710)
MS. KAREN A CONNOR	A, NINA		5	5830	0	1	0	0	0	0
MS. KAREN A CONNOR	AARDVARK, MELISSA A.		5	1	22	11	8	16	7	26
MS. KAREN A CONNOR	ABALO, PEARL		5	6374	0	0	0	0	3	1
MS. KAREN A CONNOR	ABE, SAMUEL G		5	6015	0	2	0	0	0	4
MS. KAREN A CONNOR	ABRAHAMSON, ERIK		5	6375	0	1	0	0	0	0
MS. KAREN A CONNOR	ABREU, SHANNON C.		5	285	2	1	1	7	6	9
MS. KAREN A CONNOR	ACUP, LISA		5	6376	0	1	0	0	0	0
MS. KAREN A CONNOR	ADAMS, HERCULES H.		5	1206	1	1	2	3	1	7
MS. KAREN A CONNOR	ADAMS, JOHN D.		5	1261	0	0	1	0	3	8
MS. KAREN A CONNOR	ADAMSHICK, CRYSTAL		5	6378	0	0	0	0	0	1
MS. KAREN A CONNOR	AFTER, THOMAS		5	1212	0	0	3	5	3	25

Record 8 of 541

Select Date Range1/1/20202/10/2023

Key Clients

Key Staffers

Staffers Contacts

Create XLSX File

**SITUATION:** The agency would like to see a Dashboard of activity by Staffer including any contact made to an employee.

**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 Staffers based on all employee contacts by date range.**

1. Open **COATS**.
2. Click **Reports**.
3. Click **KPI Reports**.
4. Click **KPI Staffer Contacts**.
5. Click **Staffer Contacts** tab.
6. Click **Select Date Range** to select desired date range.
7. Click **Staffers Contacts**.
8. This data is pulled by the **STAFFER** attached to the assignment in the Employee Master Record. Depending on the date range and user view, the following data will appear. The totals will show by Staffer, the user can click the arrow to drill down into each Staffer.

Below each column is defined.

**Staffer** – Name of Staffer

## COATS

(757) 499-7652 (757) 490-2888 Fax

updated 2/10/23

**Employee** – Name of Employee Contacted

**Staff#** - Staffer Id #

**Emp#** - Employee ID #

**Avl** - # of Availability comments added for that employee by the staffer.

**OUt** - # of Call-Out comments added for that employee by the staffer.

**Email** – # of Emails sent to that employee by the staffer.

**Text** – # of Texts sent to that employee by the staffer.

**Jobs** – # of Job comments added for that employee by the staffer. These are the job status changes under the Order when modifying the job status; i.e, CON, ACC, INT, PEN, LPM, RCAL, REJ, CREJ, NSNC, FIN, NER, T/H, and D/H.

**Manual** - # of manual comments added via Add Comment for that employee by the staffer