

KPI – Staffer Contacts

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	AJ, 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	ABREJU, SHANNON C.		5	285	2	1	1	7	6	9
MS. KAREN A CONNOR	ACLUP, 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

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