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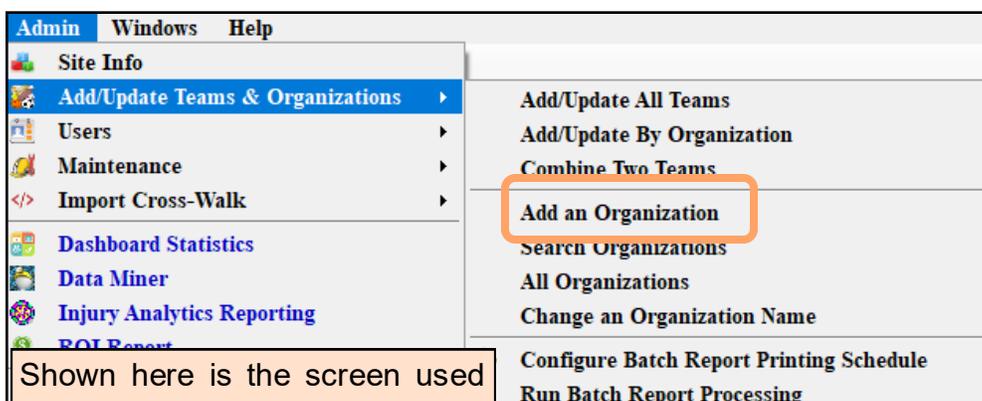
Setting Up Organizations:

If you are a single school decide if you want to create an organization for your you database. You can create one, but it is not necessary. Single schools, skip to page [4](#) for adding teams in the ATS desktop. Page 8??for staff portal

If you are setting up an outreach program, a school district wide database or any other situation where there will be multiple ATs and schools, you will need to create organizations prior to adding teams. You maintain data security with organizations as well as making it easier for the athletes to select the correct team when the register through their portal.

Before athletes self register, you import them via spreadsheet, or manually add to the system, teams must be created first. Every athlete must be assigned to one active team minimum. **You also need to grant yourself and your staff access to those teams.**

To enter an organization, follow the menu steps below. ADMIN—>ADD/ Update Teams & Organizations—> Add an Organization. *If you are a single school, you can skip to adding teams.*



Shown here is the screen used to enter/update organizations. The only required information is the organization name and "Currently Active".

A screenshot of the 'Organization Info' form. The form is divided into several sections. The 'Organization Information' section includes fields for 'Name' (with a note: 'DO NOT include a single quote, comma or apostrophe in the name'), 'Address', 'City/S/Z', and 'Region'. The 'Currently Active' checkbox is checked and highlighted in yellow. The 'Datallys NCAA and/or HS Submission Information' section includes fields for 'NCAA School ID' and 'High School ID', with a note: 'To get your school ID please contact Datallys'. The 'Sway Medical' section includes an 'API Key' field and an 'API Key Expires' dropdown. The 'Batch Confirm to' section includes a dropdown and a 'Clear' button. The 'For Import/Sync Processing' section includes fields for 'Outside Ref ID' and 'Email Notice'. The 'Actions' panel on the right includes buttons for 'Med Provider', 'Remove', 'Save', and 'Close'. At the bottom, there are tabs for 'Emergency Protocol', 'Notes', and 'Teams', and a black bar with the text: 'Use the area below to enter the Emergency Protocol for this organization.'

Organization Screen:

On the organization screen, you are able to manage aspects of that school. This allows you to complete other details for the school as it pertains to your out reach, or larger school system.

To add an organization, add the name of the school/location and check off the Currently Active box. The other information is optional.

If you are participating in the NCAA or high school research process and you have multiple organizations; you will enter the organization's ID. This is obtained from Datalys. For complete setup instructions please see the [Datalys Configuration](#) help doc.

If you use a registration software besides ATS, and you can get that information into an excel format, you can configure ATS to automatically import your demographic information. For full details on how that process works, please give us a call, 1-888-328-2577

If you are using Sway Medical for head injury evaluation, you can enter your API key for your organization here. Set the key expiration, and who will receive the nightly emails of what was processed. For full Sway set up instructions review the [Sway Setup](#) Help Doc

Emergency Protocol **Notes** Teams Email

Note Date	Comment
Add a note specific for the organization here. Contract date, new AT, anything you would like to track for the org specifically.	

Emergency Protocol Notes **Teams** Email Notice:

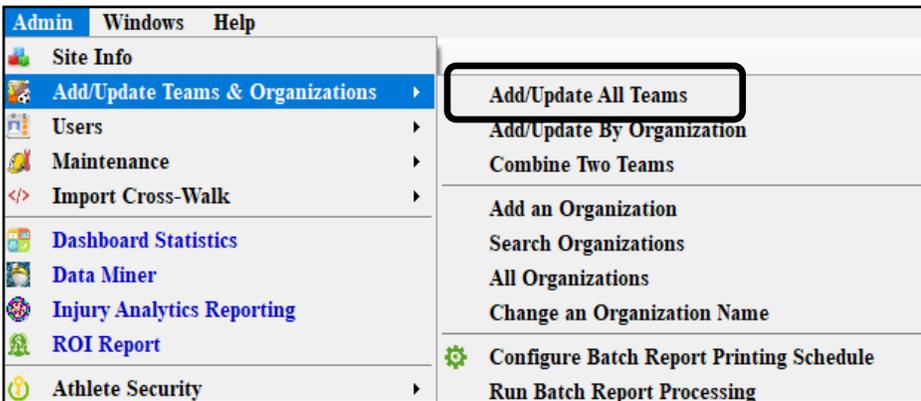
Organization	Sport	Gender	Season	Active	Your Abbrev	NCAA Sport	Start
<input type="checkbox"/>	Notification Email To	Bypass NCAA	Coach Name	Coach Email	Coach Text	End	
<input type="checkbox"/>							

The Team tab, allows you to add, or inactivate teams in a quick fashion. If you want to include teams for the ATS research or your own Analytics, you can do so here.

Setting Up Teams:

Before adding athletes to the system you must add the team information. To save time, it is also suggested to setup existing teams before creating users so that users may be given access to teams during setup.

You may add additional teams or edit existing teams at any time. Users will need access granted to new teams before viewing or adding athletes for that team. For more details on user security please see the [User Setup](#) help doc. If you edit teams, school cuts a sport or for some other reason it will no longer be needed, do not delete/remove the entry. Make it inactive to preserve historical details.



Teams are added or updated by clicking on the menu shown here.

Team Entry

Organization Filter (Note: Org filter only applies to organizations with teams) Set Email To... Clear All Notifications

Reset Show All Specific Org For All Clear Specific User Notifications

Teams (Note: Access to new teams must be set for ALL users after they are added.) Do NOT use special characters in the Organization or Sport name

Organization	Sport	Gender	Season	Active	Your Abbrev	NCAA Sport	Start Date	Competition Level	ID	Comments
Notification Email To	Bypass NCAA	Coach Name	Coach Email	Coach Text	End Date	Coach Phone	In Research	Comments		
Guest Team	Coed	Full Year	<input checked="" type="checkbox"/>	Guest					92	
Sent by A...	Men	0	<input checked="" type="checkbox"/>	ATS	0		<input checked="" type="checkbox"/>		91	
	Guest	0	<input checked="" type="checkbox"/>		0		<input checked="" type="checkbox"/>		94	
	Guest	0	<input checked="" type="checkbox"/>		0		<input checked="" type="checkbox"/>		96	
	Men	Spring	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		61	
Joe Tech	Behavioral Health	Coed	Full Year	<input checked="" type="checkbox"/>	MH		<input checked="" type="checkbox"/>		98	
Joe Tech	Football	Men	Fall	<input checked="" type="checkbox"/>	FB	FB-M	<input checked="" type="checkbox"/>		60	
Joe Tech	Mens Basketball	Men	Winter	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		64	
Joe Tech	Nutrition	Coed	Full Year	<input checked="" type="checkbox"/>	Nitr		<input checked="" type="checkbox"/>		99	

Record: 1 of 14

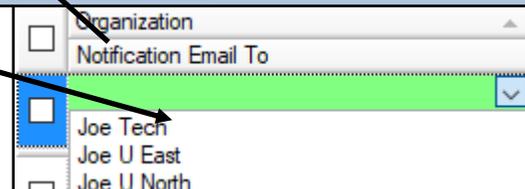
Team Actions: Do not use special characters in your organization or team name. Characters such as commas, periods, colon, semi-colon and slashes : , \ /

Grant/Revoke Access Save Remove Copy To Excel Print Increase Date+1 Close

New teams are added on the first row of the table.

Do not use special characters like /,.,:; " or others in the sport/team name

If you have organizations created; use the dropdown window to assign the team to the correct organization.



Required fields when adding a new team are: Organization if utilized, Sport, Gender, and Season and checking the Active box.

User/Team Access:

Don't forget, that for security purposes, you are not automatically granted access to the teams you add to the system. You have to grant appropriate access to yourself and everyone else that needs to view that team. This can be done in the user area or right from this screen from the grant/revoke access button.

Check off the team(s) you need to grant access to.

Organization	Sport	Gender	Season	Active	Your Abbrev	NCAA Sport	Start Date	Competition Level	ID	Comments
Notification Email To	Bypass NCAA	Coach Name	Coach Email	Coach Text	End Date	Coach Phone	In Research			
Guest Teams	test	Guest	0	<input checked="" type="checkbox"/>	0				96	
Joe Tech	Baseball	Men	Spring	<input checked="" type="checkbox"/>					61	
Joe Tech	Behavioral Health	Coed	Full Year	<input checked="" type="checkbox"/>	MH				98	
Joe Tech	Football	Men	Fall	<input checked="" type="checkbox"/>	FB	FB-M			60	
Joe Tech	Mens Basketball	Men	Winter	<input checked="" type="checkbox"/>					64	
Joe Tech	Nutrition	Coed	Full Year	<input checked="" type="checkbox"/>	Nutr				99	
Joe Tech	Softball	Women	Spring	<input checked="" type="checkbox"/>					62	
Joe Tech	Track	Coed	Spring	<input checked="" type="checkbox"/>					63	
Joe Tech	Womens Basketball	Women	Winter	<input checked="" type="checkbox"/>					65	

Click on the Grant/Revoke Access button

Then select the User(s) you want to be able to see the team or teams.

After the user(s) are selected, use the update button to grant, or revoke the access for the users.

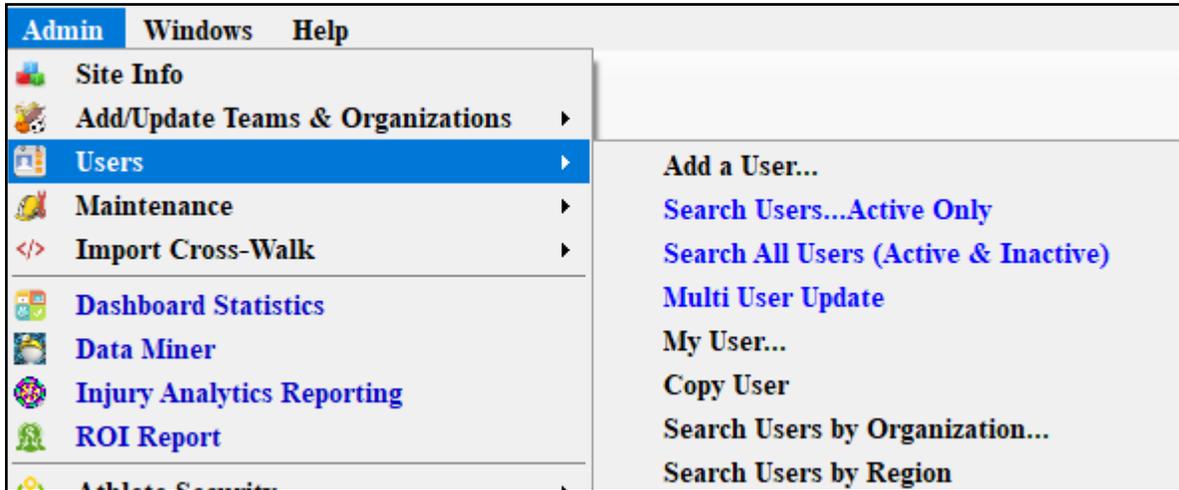
Check the box next to each staff member that you want to grant access to for the organization/team.

For staff members with access already to the organization/team you can remove their access by unchecking their name on the list.

Update Access

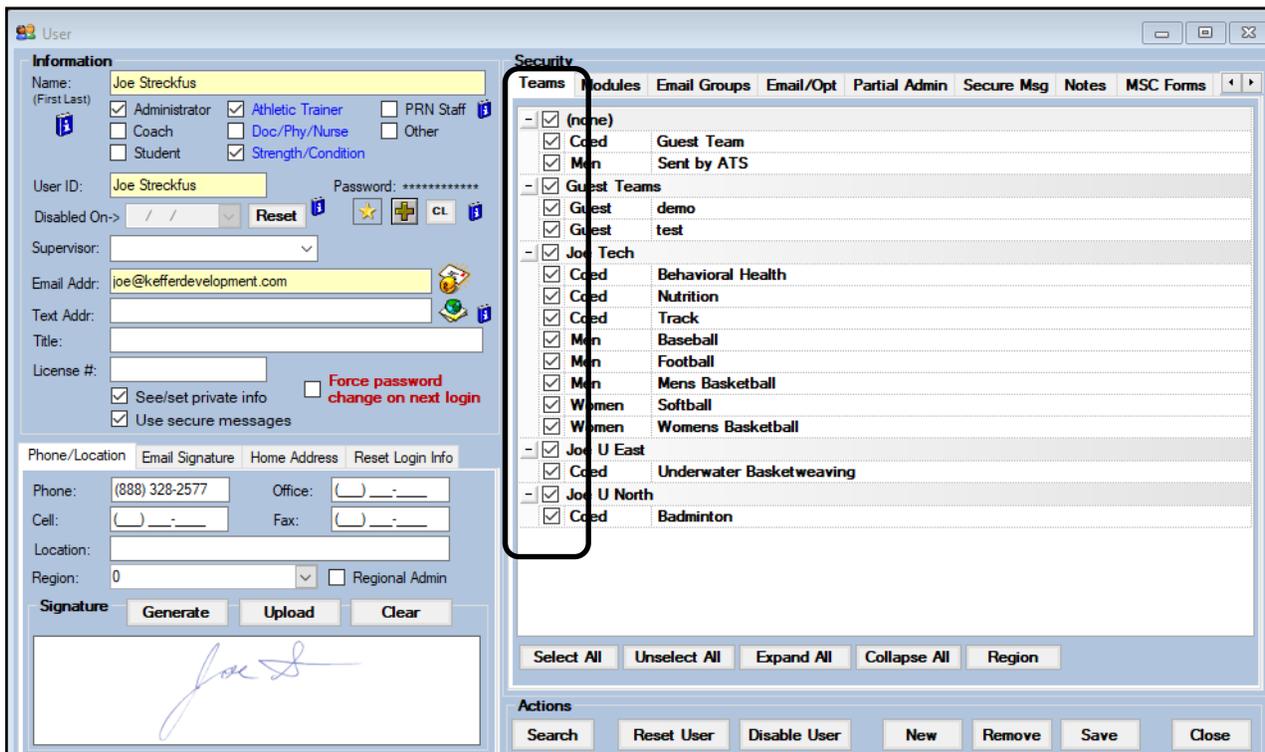
Cancel

Adding or Updating Users:



Users in the system are entered and updated and configured with the screen below.

If you did not grant access to teams during the team setup, make sure you give the user you are configuring, appropriate team access.



For more info on configuring users: see [Configuring Users Accounts](#) help doc.

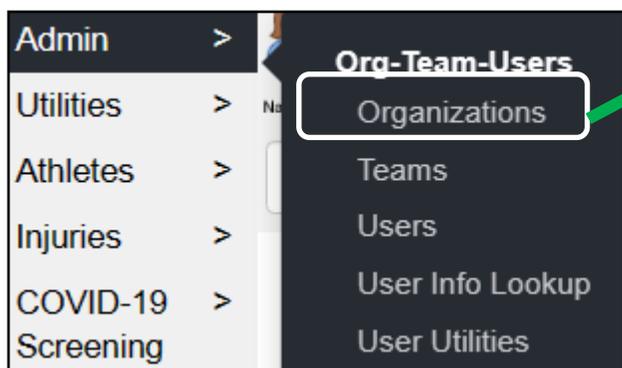
Organizations and Teams— Staff Portal: **Organizations:**

If you are a single school decide if you want to create an organization for your you database. You can create one, but it is not necessary. Single schools without organizations, skip to page 8 for adding teams in the ATS Staff Portal.

If you are setting up an outreach program, a school district wide database or any other situation where there will be multiple ATs and schools, you will need to create organizations prior to adding teams. You maintain data security with organizations as well as making it easier for the athletes to select the correct team when the register through their portal.

Before athletes self register, you import them via spreadsheet, or manually add to the system, teams must be created first. Every athlete must be assigned to one active team minimum. **You also need to grant yourself and your staff access to those teams.**

To enter an organization, go to your Admin Tab—> Organizations—> Add Org button. Minimum requirements to add a new Organization are the Name and to make it Currently Active.

A screenshot of the 'Organization Maintenance' form. The 'Name' field is highlighted with a red box. The 'Currently Active' checkbox is also highlighted with a red box. The form includes fields for Address, City, State, Zipcode, Region, NCAA School ID, High School ID, Outside Reference ID, Email Notification, Sway Medical API Key, and Batch Confirm to. There are also buttons for 'Save', 'New', and 'Med Provider'.

If you are participating in the NCAA or high school research process and you have multiple organizations; you will enter the organization's ID. This is obtained from Datalys. For complete setup instructions please see the [Datalys Configuration](#) help doc.

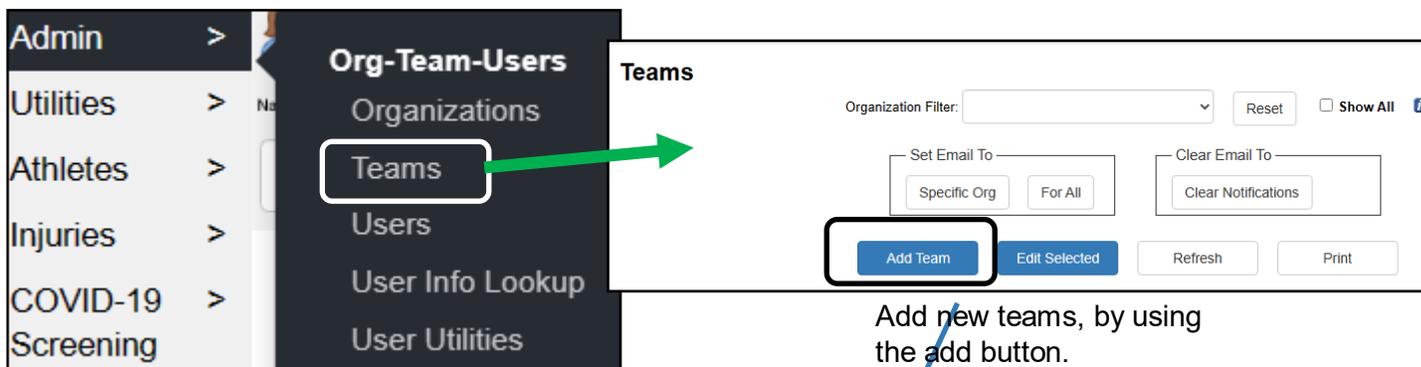
If you use a registration software besides ATS, and you can get that information into an excel format, you can configure ATS to automatically import your demographic information. For full details on how that process works, give us a call 1-888-328-2577

If you are utilize Sway Medical, and have more that One organization, put your API key here. For full Sway set up instructions review the [Sway Setup](#) Help Doc

Setting Up Teams— Staff Portal:

Before adding athletes to the system you must add the team information. To save time, it is also suggested to setup existing teams before creating users so that users may be given access to teams during setup.

You may add additional teams or edit existing teams at any time. Users will need access granted to new teams before viewing or adding athletes for that team. For more details on user security please see the [User Setup](#) help doc. If you edit teams, school cuts a sport or for some other reason it will no longer be needed, do not delete/remove the entry. Make it inactive to preserve historical details.



Add new teams, by using the add button.

If you have organizations created, select the appropriate one from the drop down list.

Do not use special characters like ',,,:; " or any others in the sport/team name

The 'Team Maintenance' form has several fields. On the left, 'Organization' is a dropdown menu, 'Sport' is a text input, 'Gender' is a dropdown, 'Season' is a dropdown, 'Your Abbrev' is a text input, and 'Notification Email To' is a list box. At the bottom left, there is an 'Active' checkbox. On the right, 'NCAA Sport' is a dropdown, 'Bypass NCAA' is a checkbox, 'Coach Name' is a text input, 'Coach Email' is a text input, 'Coach Phone' is a text input, 'In Research' is a checkbox, 'Start Date' is a date input, and 'Competition Level' is a dropdown. 'Save' and 'New' buttons are at the bottom left.

Required fields when creating a new team. The Organization if you have them. Everyone needs to include, Sport name, Gender, Season, Abbreviation, and to check as Active.

Granting Users Team Access:

Don't forget, that for security purposes, you are not automatically granted access to the teams you add to the system. You have to grant appropriate access to yourself and everyone else that needs to view that team. This can be done in the user area.

Users

Organization Filter: Show All ?

User
Howser, Dougie
Keffer, Rhett
Streckfus, Joe

Choose Add if you need to create a new account, or select the user you need to change, from the list and select Edit. When the screen loads, select the Team tab, and choose the appropriate team access for the account you created.

User Maintenance - Dougie Howser

General Info **Teams** Modules Email Groups Email/Opt Partial Admin Docs

Region Filter:

<input type="checkbox"/> (none)	Guest Team
<input type="checkbox"/> Coed	Sent by ATS
<input type="checkbox"/> Men	
<input type="checkbox"/> Guest Teams	
<input type="checkbox"/> Guest	demo
<input type="checkbox"/> Guest	test
<input type="checkbox"/> Joe Tech	
<input checked="" type="checkbox"/> Coed	Behavioral Health
<input type="checkbox"/> Coed	Nutrition
<input checked="" type="checkbox"/> Coed	Track
<input checked="" type="checkbox"/> Men	Baseball
<input checked="" type="checkbox"/> Men	Football
<input checked="" type="checkbox"/> Men	Mens Basketball
<input checked="" type="checkbox"/> Women	Softball
<input checked="" type="checkbox"/> Women	Womens Basketball
<input type="checkbox"/> Joe U East	
<input type="checkbox"/> Coed	Underwater Basketweaving
<input type="checkbox"/> Joe U North	