ATS— Batch (Automated) Reports Configuration

ATS allows you the ability to set up Batch Reports or Automated Reports. These reports are chosen by your system administrator from the list provided. They are able to be sent automatically to desired recipients, on desired days and from one of the stock time slots.

Example: having the coaches for your basketball team, get a daily limitation report M,T,W,Th,F at 12pm EST so they know who can participate that day.

ATS allows you the flexibility to customize the days and the times to fit your individual needs.

Before setting up the batch process, you will need to add the staff that needs the email to your user list. The batch process uses their account to compile and then email the information. For more information on configuring users, please see the Configuring User, or Coach as a User help doc.

After creating your users, the next step is enabling the batch process in your Site Info area.

Go to ADMIN—>Site Info—> Opt (1) tab. Make sure the "Enable batch report processing based on the schedule defined" is enable by checking off the box.

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Setting up batch reports begins by going to the ADMIN tab—> Add/Update Teams & Organizations—> Configure Batch Report Printing Schedule.
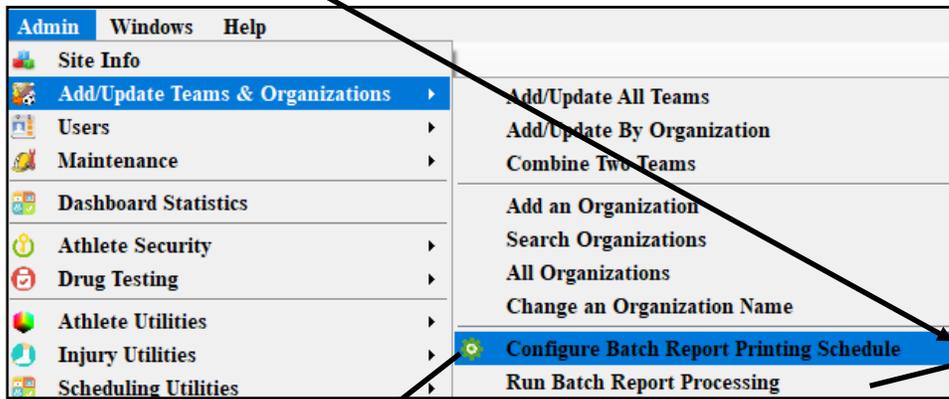
Run Batch Report Processing, allows you to manually send all of the batch reports, rather than waiting for the system to automatically send. This process will not override the automatic email, it will still be processed at the scheduled time.
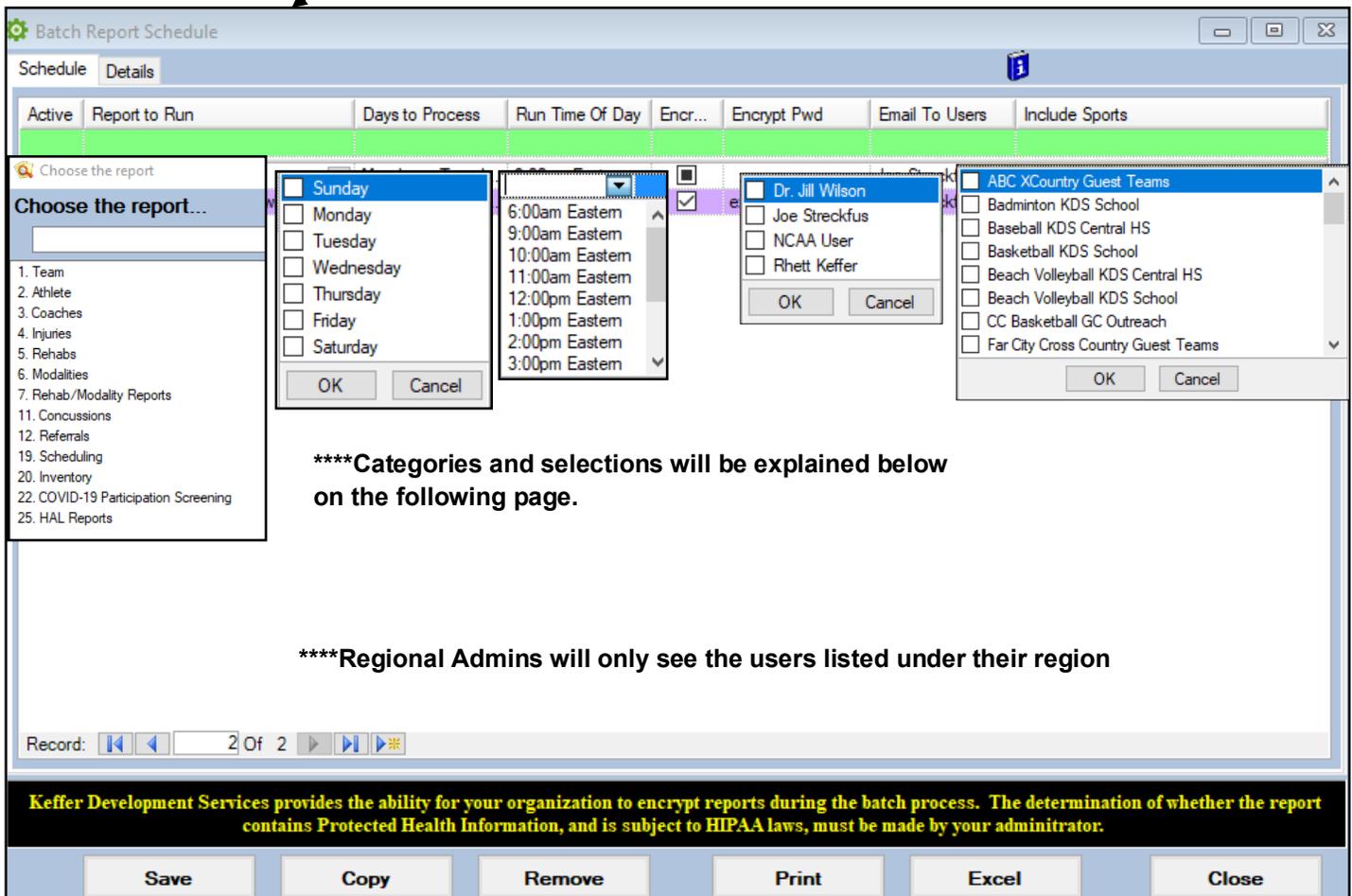
**Categories and selections will be explained below on the following page.

****Regional Admins will only see the users listed under their region

Keffer Development Services provides the ability for your organization to encrypt reports during the batch process. The determination of whether the report contains Protected Health Information, and is subject to HIPAA laws, must be made by your administrator.

| Save | Copy | Remove | Print | Excel | Close |

Allows you to copy a batch report, then allowing you to change the users to send reports to.

Removes the batch report entry

ATS— Batch (Automated) Reports Configuration

★ =required fields

Active Begin by marking the report as active. This can be used to also deactivate the form when it does not need to be sent, off season, or summer periods.

Report to Run This is a dropdown/select area. Choose the report you would like to have sent from the available forms.

Days to Process Select the day or days of the week you would like the report to be sent.

Run Time Of Day Gives you flexibility to have batch reports sent throughout the day, starting at 6am, 9a,10a,11a,12pm,1p,2p,3p,4p,5p,6p,7p,8p. Those times are eastern, so do adjust based on your time zone to have reports sent when you need.

Encr... **Encrypt Pwd** Check if you would like the form encrypted, and then assign a password for the protection. We do Strongly Recommend to encrypt the files.

Email To Users You able to select from the list of users to have the report sent to. Again, you are able to select as many users to have the report sent to. If they are selected here, they will get the report for all teams that are selected.

Include Sports Selecting teams here, will generate the information to send to the users that are selected. No matter if they have permission to view the team or not, if you select a user the information that is selected for the team will be sent to them.

***Create separate batch reports for every team you are sending them for. If you include multiple users on one batch, and select multiple teams, all the users selected will get the associated reports for every team that is selected!**

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The Details menu tab, of the batch schedule allows you to see exactly what reports are being sent, on the days they are being sent, the recipients of the scheduled reports. If it is encrypted and the password associated. Utilize the expand and collapse buttons to see more or less details, for the day, or specific report being sent.
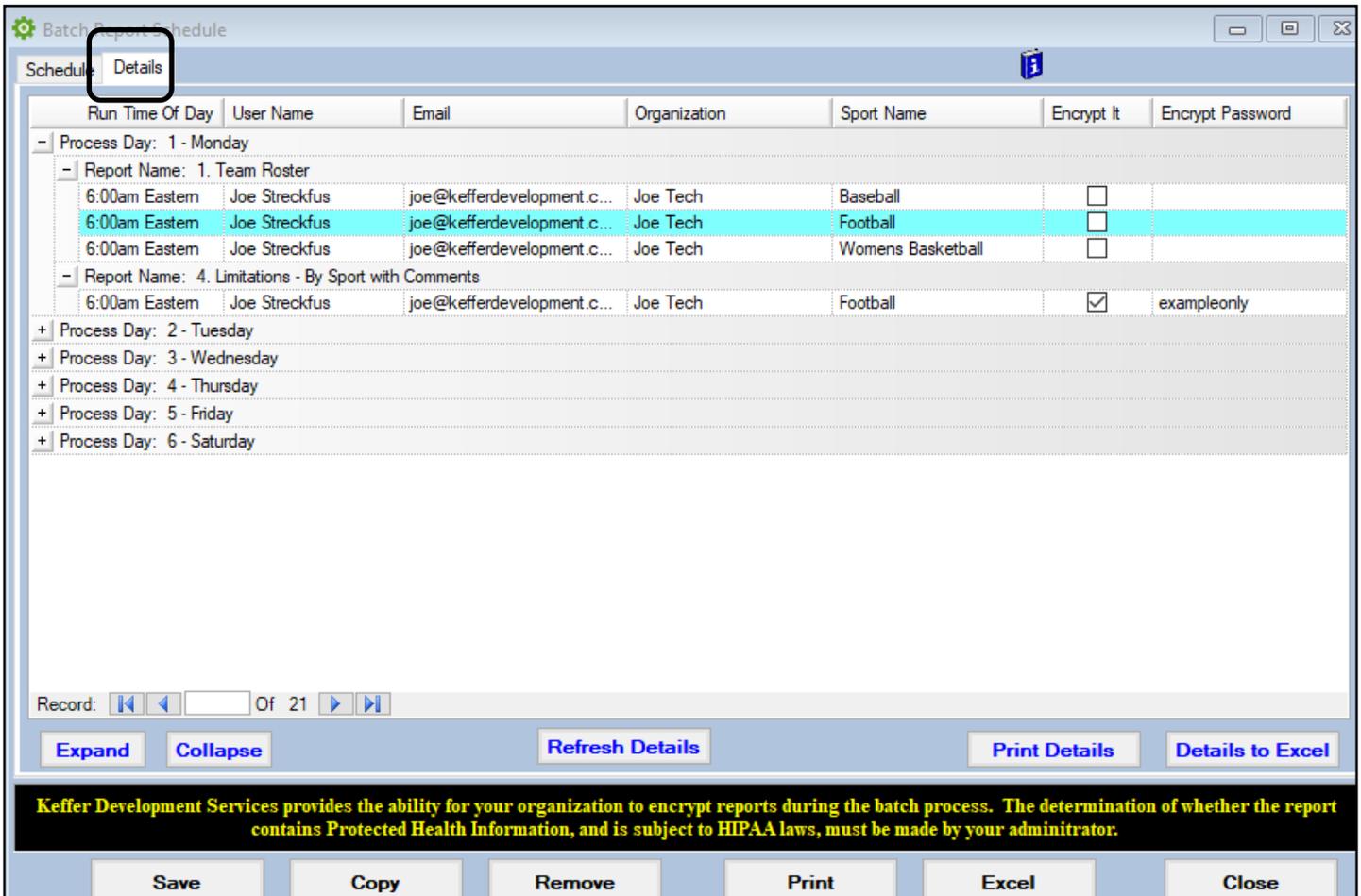
Run Time Of Day	User Name	Email	Organization	Sport Name	Encrypt It	Encrypt Password
Process Day: 1 - Monday						
Report Name: 1. Team Roster						
6:00am Eastern	Joe Streckfus	joe@kefferdevelopment.c...	Joe Tech	Baseball	☐	
6:00am Eastern	Joe Streckfus	joe@kefferdevelopment.c...	Joe Tech	Football	☐	
6:00am Eastern	Joe Streckfus	joe@kefferdevelopment.c...	Joe Tech	Womens Basketball	☐	
Report Name: 4. Limitations - By Sport with Comments						
6:00am Eastern	Joe Streckfus	joe@kefferdevelopment.c...	Joe Tech	Football	☑	exampleonly
Process Day: 2 - Tuesday						
Process Day: 3 - Wednesday						
Process Day: 4 - Thursday						
Process Day: 5 - Friday						
Process Day: 6 - Saturday						

Record: |◄ ◄ [ ] Of 21 ► ►|

Expand **Collapse** **Refresh Details** **Print Details** **Details to Excel**

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Save **Copy** **Remove** **Print** **Excel** **Close**

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Reports are sent at the selected time and days selected on the previous pages. Below is an example of what the users will receive.

Thu 6/3/2021 6:05 AM

joe@kefferdevelopment.com

Report from ATS

To   joe@kefferdevelopment.com

✉ Message   📄 4_Limitations_-_By_Sport_with_Comments_2021-06-03_3_encrypted.PDF (38 KB)   📄 Open PDFs in Adobe Acrobat   ✕

Automated report

Per HIPAA (the Health Insurance Portability and Accountability Act of 1996) Regulations, this Information is to be held in strict CONFIDENCE, to be used only making participation plans for the student-athletes. Information should not be passed to any other individual or group of individuals.

Once the user enters the appropriate password they see their report.

Password   ✕

⚠ 'Daily_LimitationOnly_Spo...' is protected. Please enter a Document Open Password.

Enter Password: |

OK   Cancel
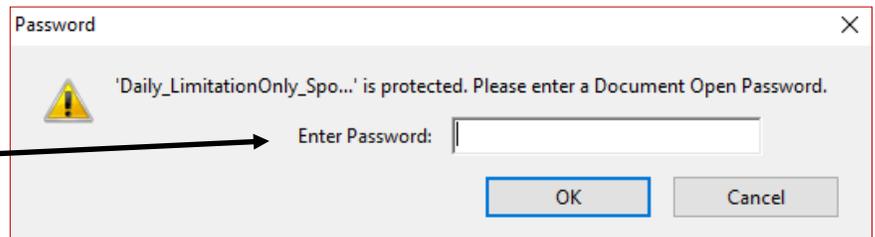
KDS School
Daily Limitation Report by Date for 2/13/2017

Your Logo Here

Player Name	Injury	Injury Date	Limitation	Game Status
Men's Baseball				
Practice/Event # 1				
Anderson, Bobby	Abrasion - Bilateral - Arm (Upper)	08/01/2016	Go as able	Probable