

ATS— Adding Teams in the Staff Portal

Organizations and Teams— Staff Portal:

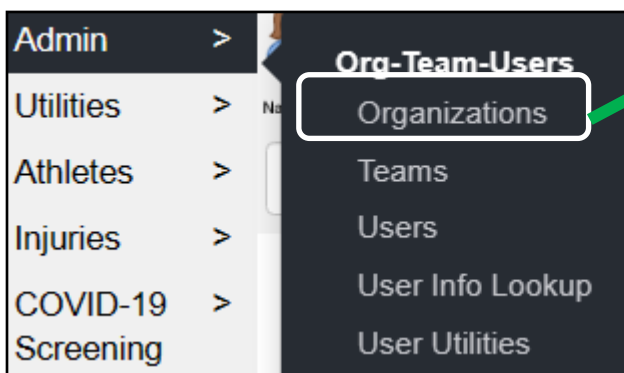
Organizations:

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 2 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 black box. Below it are fields for Address, City, State, Zipcode, and Region. A 'Currently Active' checkbox is also highlighted with a black box. The form includes sections for 'Datalys NCAA and/or High School Submission Information' with fields for 'NCAA School ID' and 'High School ID', and 'Sway Medical' information including an 'API Key' and 'Batch Confirm to' dropdown. At the bottom are 'Save', 'New', and 'Med Provider' buttons.

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

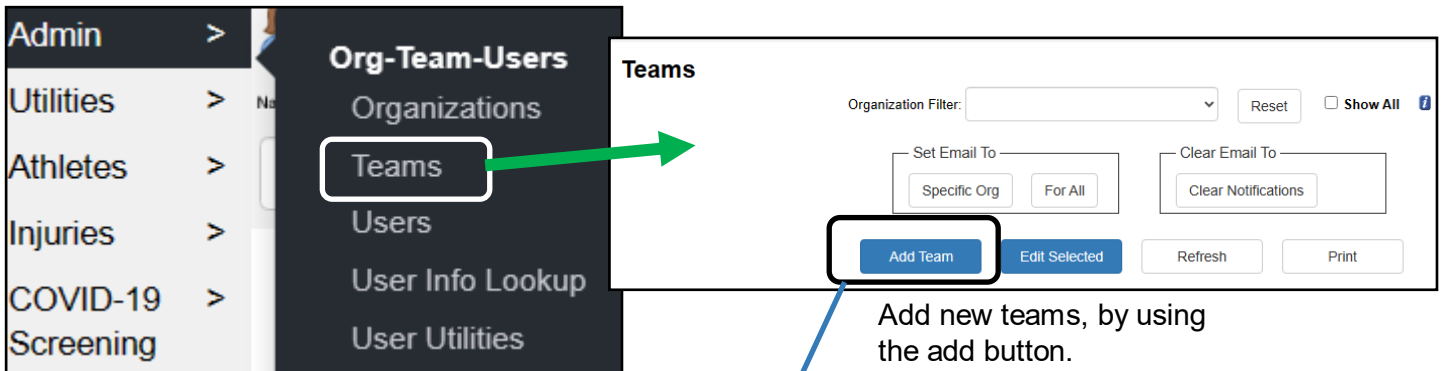
If you are utilize Sway Medical, and have more that One organization, put your API key here. For full Sway set up instructions review the [Sway Setup](#) Help Doc

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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

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

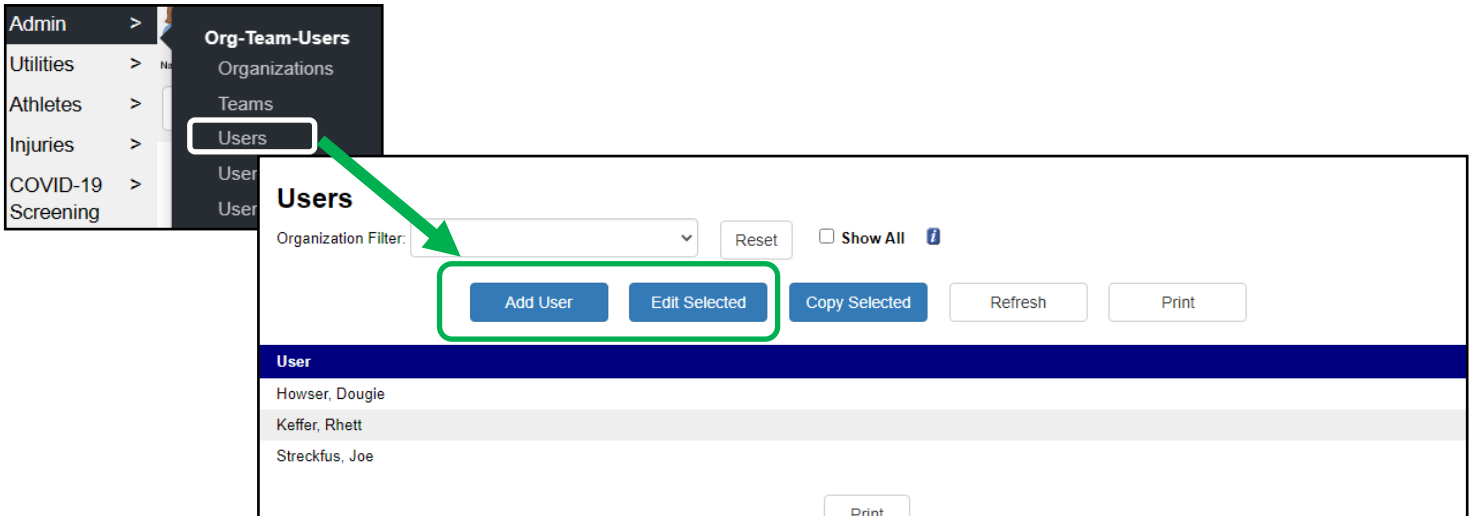
The 'Team Maintenance' form has several fields. On the left, there is a 'Return to Teams' link. The 'Organization' field is a dropdown menu. The 'Sport' field is a text input with 'Sport' entered. The 'Gender' field is a dropdown menu. The 'Season' field is a dropdown menu. The 'Your Abbrev' field is a text input with 'Your Abbreviation' entered. The 'Notification Email To' field is a dropdown menu with options: 'Dougie Howser', 'Joe Streckfus', 'Keffer Admin', and 'Key Phrase Master'. The 'Active' checkbox is checked. At the bottom are 'Save' and 'New' buttons. On the right side, there are fields for 'NCAA Sport' (dropdown), 'Bypass NCAA' (checkbox), 'Coach Name' (text input), 'Coach Email' (text input), 'Coach Phone' (text input), 'In Research' (checkbox), 'Start Date' (text input), and 'Competition Level' (dropdown).

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.

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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.



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.

