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Inputting Recruiting Activity in ARMS

Recruiting Overview

Through ARMS, all recruiting functions can be input, tracked, and approved in one efficient, centralized location.

This inputting process can be done from the coach's computer or on the road while recruiting by using our ARMS Mobile App. Recruiting Activity will be seen and shared across the coaching staff and with compliance in an easy to read and efficient manner.

Below is a guide, from start to finish, to using ARMS for the following:

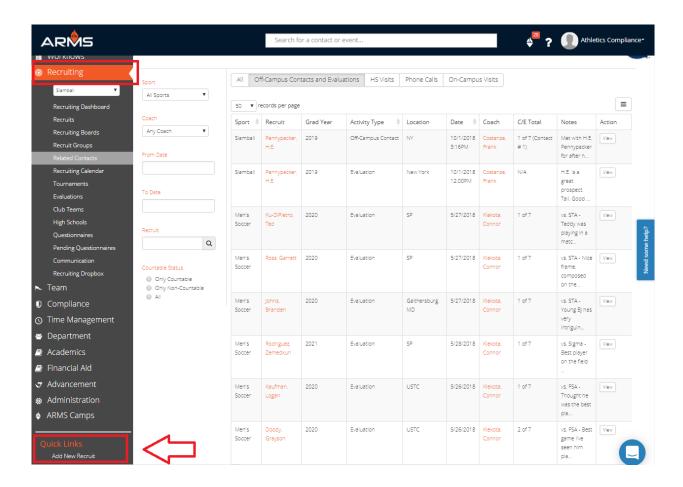
Inputting a recruit into your system → tracking your recruiting activity for that recruit



Adding a Recruit

There are several ways to add a recruit in ARMS.

1.) Add a Recruit manually. This can be done by clicking on the **Recruiting** module, then scrolling down to "Quick Links", and selecting **Add New Recruit**.



Once here, simply add the recruit's information (name, email, phone, high school, graduation year, videos, etc.) and click save.

2.) Import a list of recruits into ARMS

The ARMS Support Team will import spreadsheets (.xls/.csv) of recruit data for coaches. All spreadsheets can be sent to help@armssoftware.com to be loaded to the ARMS database.

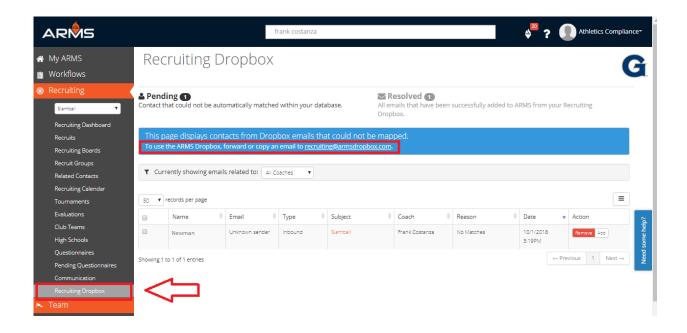
3.) Add a recruit via the Recruiting Dropbox

Coaches often receive emails from prospects directly into their school email inbox. Using the Recruiting Dropbox, ARMS provides coaches with the ability to store this communication directly on a recruit's profile whether they are new or existing.

The following methods can be used to send emails from your university email account into ARMS:

- Forward (Fwd:) emails to **recruiting@armsdropbox.com**
- Blind Copy (Bcc:) emails sent to recruiting@armsdropbox.com

Email communication will be stored on the recruit's profile in the Activity Stream & within the Communication page. If ARMS is unable to match the email to one specific recruit in the database, the email will be stored in Recruiting Dropbox. You will have the option to add the communication onto an existing recruit's profile/contact or as a new recruit profile/contact

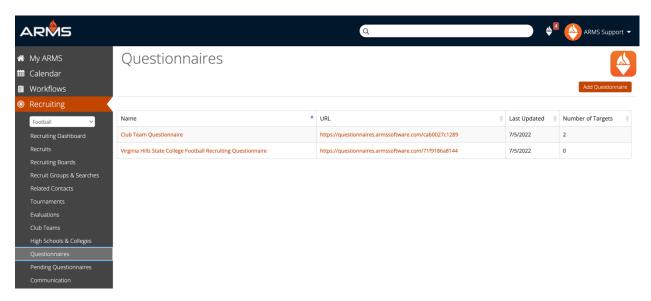


As stated above, once a recruit is "added" from the "Pending" tab, that recruit is now in your system and will appear in the "Resolved" section in the dropbox.

4.) Add a recruit by Questionnaire

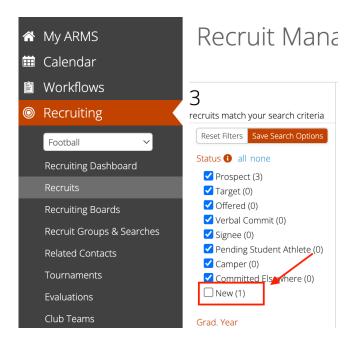
Questionnaires can be made available to recruits by linking a questionnaire to a sport's webpage on the School's Athletic Website, putting the questionnaire link in the coach's email signature, or through direct communication to recruits.

The public URL for questionnaires are found by clicking into the QUESTIONNAIRES tab



PSA Questionnaire Submission

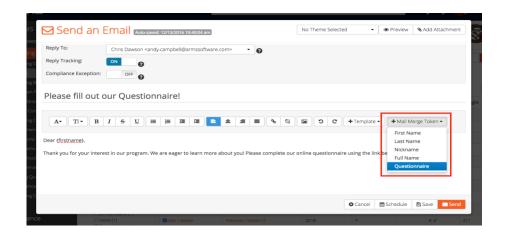
When a questionnaire is completed by a PSA, there are two ways we enter them into the database. First, is an already existing recruit fills out the questionnaire, and the information they provide matches an existing profile in your recruiting database. In this case ARMS will automatically map the questionnaire to the recruit's profile. The second is through the NEW STATUS. If ARMS cannot match the questionnaire with an already existing recruit, the questionnaire will appear in the RECRUITS tab, under Recruiting, waiting on your review with the status of NEW.



When you click into the NEW status you can map the questionnaire to an existing profile by using the MERGE feature, or you can update the status of the profile to an already used option (PROSPECT, CAMPER, TARGET, etc.) to remove them from the NEW criteria. This helps you filter the recruit entries into your database.

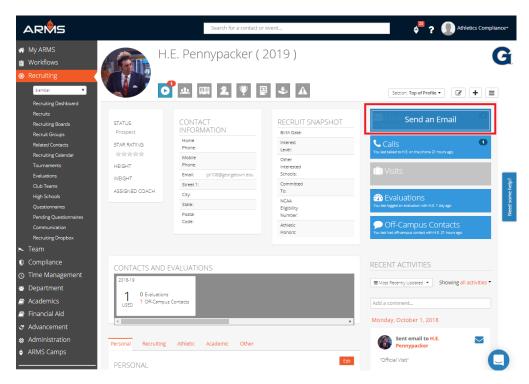
Emailing Questionnaires

Coaches can email questionnaires directly to individual or a group of recruits in their database. The recruit will receive a unique link to the questionnaire. If they have already completed the questionnaire, any preexisting attributes will be auto-filled and the recruit will have the ability to update as necessary. To email a questionnaire add the **questionnaire token** to any email or provide the link to the questionnaire.



Recruiting Activities Tracked in ARMS

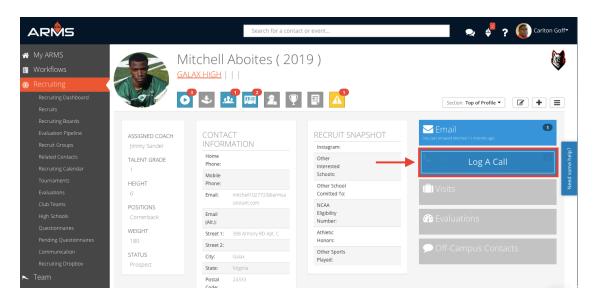
- 1) Emails: Emails can be sent to recruits via either computer or ARMS Mobile App.
 - The easiest way to send an email to a recruit is by simply accessing their recruit profile from your computer and selecting **Send an Email** on the right-hand side. This will automatically bring up the body of an email that you can fill in and send.



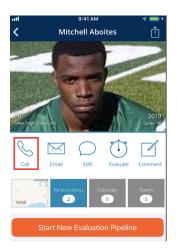
• The other way is by accessing the recruit's profile through the ARMS Mobile App and sending an email through their profile.



- **2) Phone Calls:** Phone calls can be logged on the computer or ARMS Mobile App.
 - The easiest way to log a call to a recruit is by simply accessing their recruit profile from your computer and selecting **Log a Call** on the right-hand side. This will automatically bring up a screen where you can fill out the information from the call and save it.



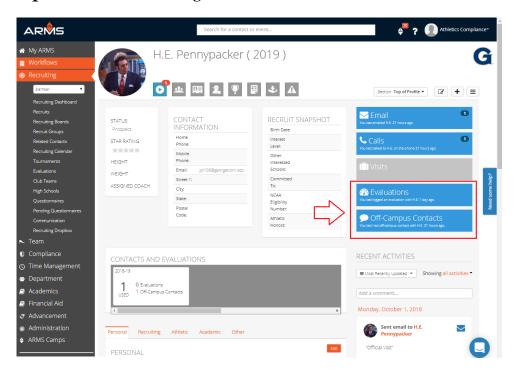
• On the ARMS Mobile App you can Log A Call and also make calls directly out of the App. To do this find the recruits profile, click on the phone icon widget **Call**.



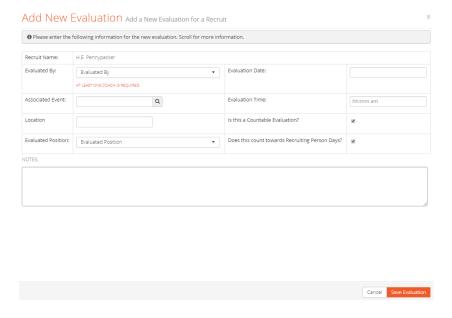
• This will lead you to the menu choices of making an outbound call, or logging a previously made call. ARMS will notify you if you are making any violations by making the call or if you have the green light to call away.



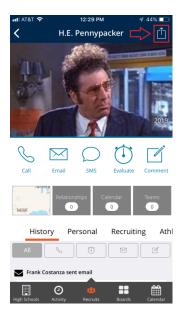
- **3) Off-campus Contacts or Evaluations:** Logging of all off-campus contacts or evaluations can be completed via either computer or the ARMS Mobile App.
 - The easiest way to record an off-campus contact or evaluation is by accessing the recruit profile from your computer and selecting either **Evaluations** or **Off-Campus Contact** on the right-hand side.



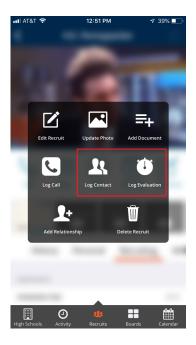
 From here, either an evaluation or contact form will appear wherein there are boxes to fill in the appropriate information regarding the evaluation/contact and save.



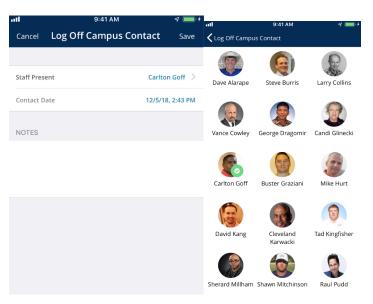
Also record an evaluation or off-campus contact right from your phone. Simply
access the recruit's profile and click the top right icon



 From there, select either Log Contact or Log Evaluation to submit the offcampus recruiting activity

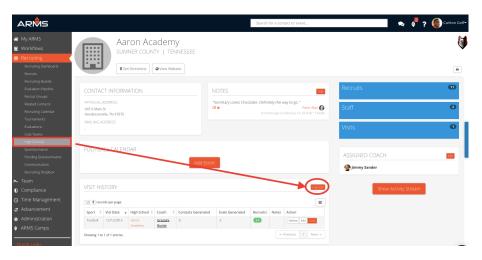


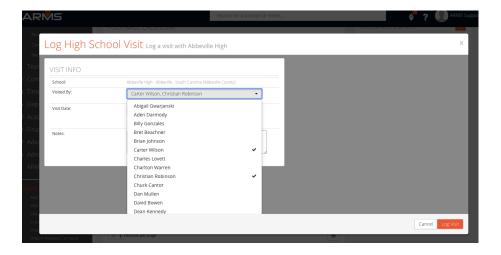
- The ARMS Mobile App can also log multiple coaches on a contact. The "Staff Present" selector will pull directly from the team's staff list and allow multiple members of your coaching staff to be selected.
- Be aware that the date is auto filled for the day the log is created. If logging the contact after the fact, (i.e. the next morning, or once a coach returns to campus), update the contact to reflect the correct date.

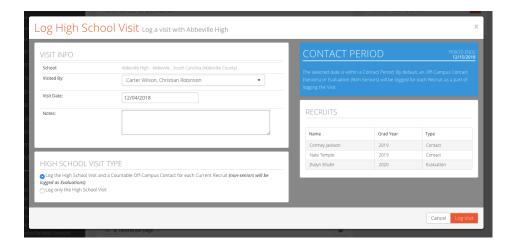


During the Contact Period, there is the ability to log contacts through the High School's profile page on the computer or the ARMs Mobile App (iPhone only). When logging from the High School page, our system is designed to identify "Grad Year", so it will log Contacts to all High School Seniors, while logging Evaluations to all underclassmen. To log contacts through the HS Page:

- Click on the **High School** you are visiting
- Click **Add Visit** button on the Visit History section of the HS profile page

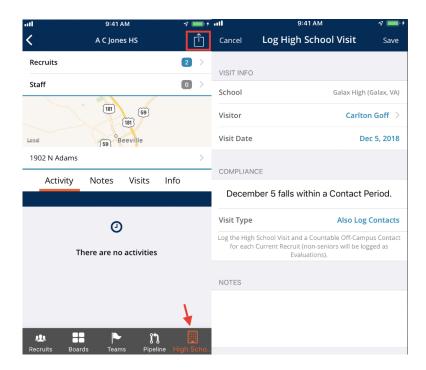




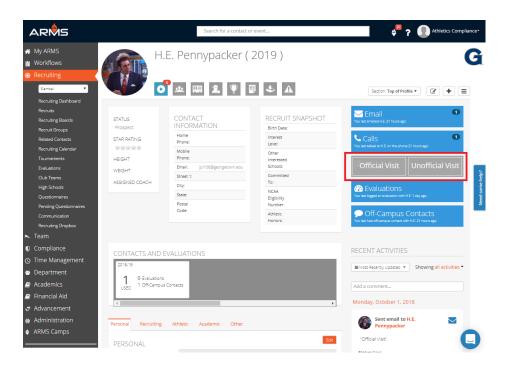


On the ARMS Mobile APP

- Go to The High Schools tab and select the visited High School
- Select the **upload button** in the top right corner of the screen
- Select the **Log Visit** Icon



- **4) On-Campus Visits:** All official and unofficial visits can be submitted through ARMS on the computer as well.
 - The easiest way to submit an official or unofficial visit is by accessing the recruit profile from the computer and selecting either "Official Visit" or "Unofficial Visit" on the right-hand side when moving the mouse over "Visits"
 - Once selected the appropriate workflow or document will appear on the screen.



Many schools will have these visits connected to, or originally started by, a department wide workflow. These workflows will automatically pull PSA's information and will cut down on coaches and administrators time and clicks. Contact ARMS if you believe your school is interested in syncing this feature across the departments and multiple calendars.

Customizing & Grouping within Recruiting in ARMS

Customizing Overview

Through ARMS, all recruiting functions can be customized for every individual sport, coach, and staff member associated within an Organization. This allows ARMS to create unique experiences for all users and promotes individuality within your processes.

Below is a guide, from start to finish, to using ARMS for the following:

 \rightarrow Customizing a recruit's profile \rightarrow customizing recruiting Fields and Facets \rightarrow Recruiting Groups



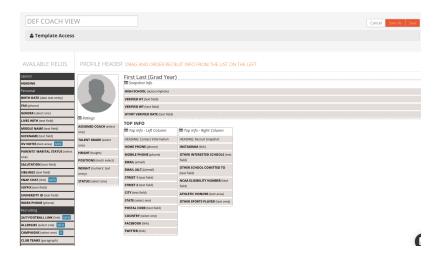
Custom Views

When in a recruit's profile, the layout of the recruit's information is already preset at the top of the profile. If a coach would like to rearrange the look of this information, Custom Views allows them to customize the recruit profile to your preference.

• In the recruit profile, click the **3 Bar Action Menu** in the top right-hand corner. At the bottom of this drop down list is the ability to change to already made Profile Views and to create a new views by clicking the **Customize View** tab.



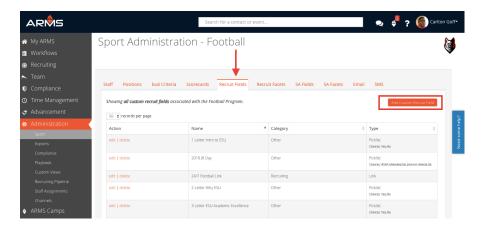
- In the Custom Veiws screen, drag and drop information from the "Available Fields" to the "Profile Header" to put them in the Profile View.
- You can drag and drop within the columns as well to change the order of the recruit fields
- To remove a field, drag and drop from the columns to the grey "Available Fields" area on the left side of the screen
- At the top of the screen is the Title Box, "Save", and "Save As" buttons. Similar to a Word Doc, "Save" will save over the existing Custom View. To create a new Custom View make a new title in the Title Box and Click "SAVE AS"



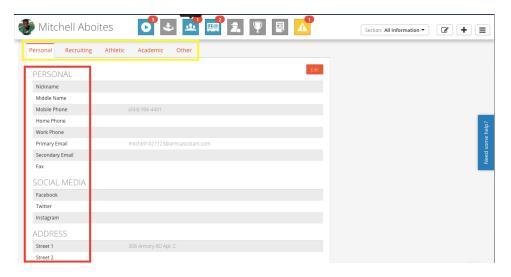
Recruit Fields:

Recruiting Fields are the measures at which coach's characterize and evaluate recruits. They are every category and piece of information collected in a recruit's profile. Because no sport or coach's recruiting measurables or characterizations are the same we want coaches to be able to customize them easily.

- By clicking into the **Administration** module, selecting **Sport**, and clicking into the **Recruit Fields** tab, you are able to add/edit/ delete any Recruit Fields.
- You can separate them by the category they appear on a Recruits profile (Academic, Athletic, Other, Recruiting, Personal)
- You can select the type of field it is as well (Textbox, picklist, etc.)



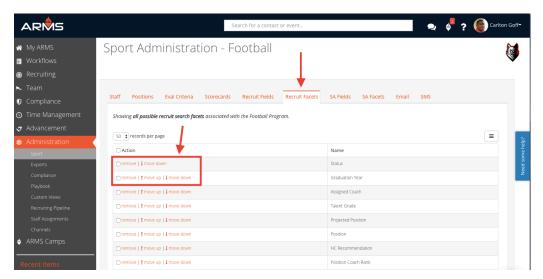
• In a recruits profile, at the bottom of the page, is where the Recruit Fields (Red Box) and their Categories (Yellow Box) are located.



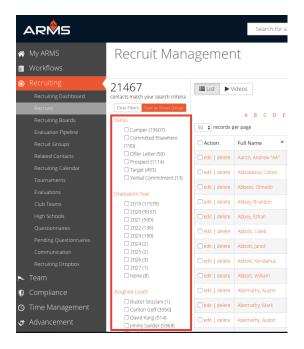
Recruit Facets:

Recruit Facets are the way in which we search and categorize all of the Recruiting Fields in ARMS. They can be seen of the left side of the Recruit Management screen. This allows users to customize the way they group, search, and identify recruits. The list of Recruit Facets available for are identical to the list of Recruit Fields already created. This list is located to the right of the Recruits Field tab in the Administration module.

- Ability to Add/Edit/Move the Facets
- Facets appear in the same order here as they will in Recruit Management Screen



 Click in the Facets to narrow the search on the Recruit Management Screen

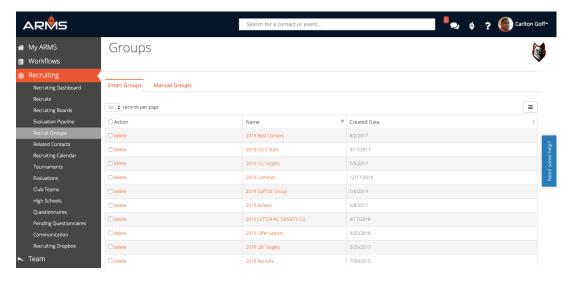


Recruit Groups & Searches:

Organizing recruit's in ARMS can be broken down into two segments, Saved Searches and Groups.

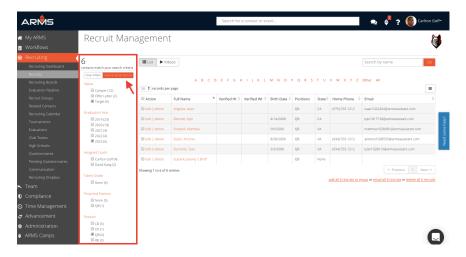
Saved Searches are from the Recruit Management screen when sorting the Recruit Facets available on the left hand side of the screen. They will adjust as the Fields/Facets of the recruits are adjusted. (I.e. 2023, 5 Star, Quarterbacks, Who Live in Texas).

Groups are set groups that change only when users add/remove a recruit manually.



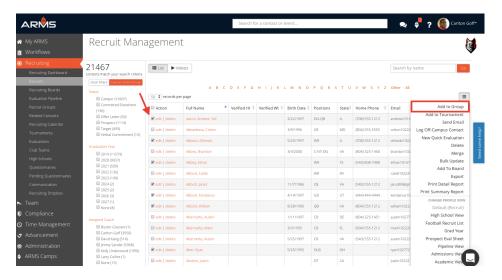
To Make a Saved Search

In the Recruit Management page, select **the Facets** in which you want to save the search by. Once selected, click **Save Search Options**. Title the search and it will appear in the Recruit Groups & Searches tab under *Saved Searches*. This saved search will grow and shrink as the Recruits associated with the Fields/Facets change.

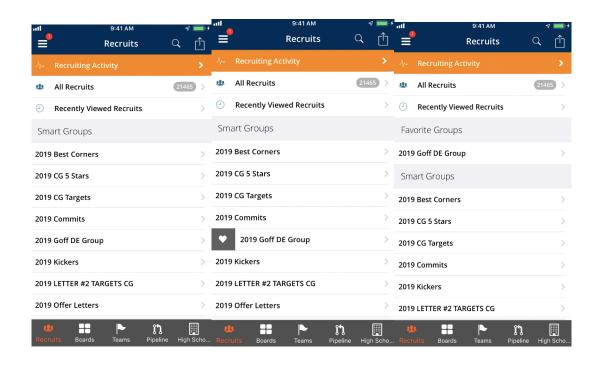


To make a Group

In the Recruit Management screen, select **the recruits** in which you want to save in a Group by clicking the **action button** to the left of their name. Once all recruits are highlighted that you want to add, click on the **3 bar action** menu and select **Add to Group**. Title the group and it will appear in Recruit Groups & Searches tab under the *Groups*. This group will only grow and shrink as users manually add/remove recruits.



Groups can also be shown on the ARMS Mobile App. By sliding across the group and clicking the **heart icon** they can save them to the coach's Favorites section, which brings them to the top of the coach's screen for easy access.



Team & Roster Management in ARMS

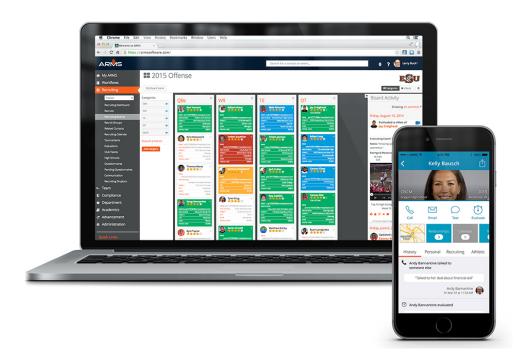
Team & Roster Management Overview

Through ARMS, entire rosters, previous years included, and their practice/class/competition schedule can be managed with ease and simplicity.

CARA, RARA, Team Communication, Roster Management, etc. is all under one roof in ARMS and is easily accessible. Most of the Roster Management features will be handled by Compliance, however if coaches are a single sport users, ARMS Support can assist with any additional features necessary to run your organization seamlessly.

Below is a guide, from start to finish, in using ARMS for the following:

Declaring Playing Season/ Calendar → CARA Logs & Approval System → Customization & Grouping of Roster → Communicating with Student-Athletes

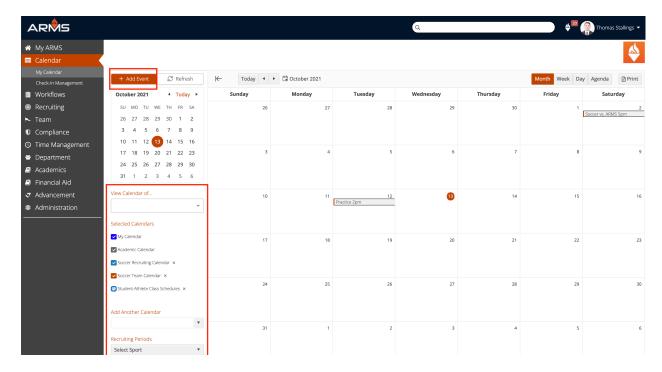


Playing Season/Calendar:

ARMS provides the ability to declare the Playing Season and segments for the current Academic Year and have it all outlined and legible in the Playing Season Calendar. Depending on each individual school, Compliance will usually help designate Out-of-Season, Championship & Non-Championship Segments along with Week Start dates before ever putting any events in the calendar.

Calendar

In this module, the calendar can be seen in a very basic view sorted from Daily-Monthly. This allows users to see and do the very basics, like adding an Event or recruit's/student-athlete's birthdays on a month, weekly or day view. Coaches and administrators will also be able to have the option to see SA's class schedule as well, in order to plan or coordinate different events.

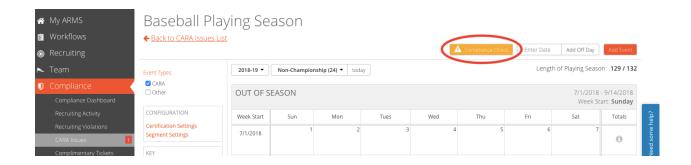


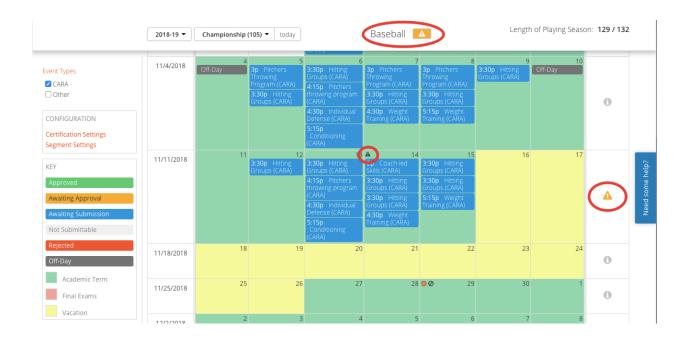
Playing Seasons Calendar

In this tab, under the Team module, the outlined segments of your season will be visable. This is a more detailed view of the Calendar and will be used more for CARA Approval and Compliance uses. The Playing Season and Team Calendars are in sync and show the same events, but act differently in functionality.

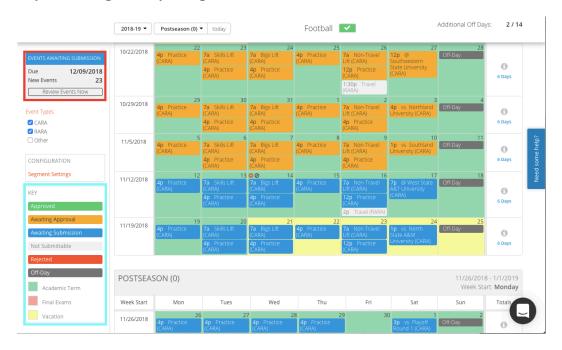
The Playing Season Calendar is more interactive and has Compliance features within the calendar. The only thing the Playing Season Calendar will not show is the team's Academic Courses.

Once all events (Practices, Competitions, Team Meetings, etc.) are put in the calendar, there will be notifications on the top of the screen, the end of the week, and the individual day if there are any CARA Violations as a pre-violation warning.





In regards to submission and approval settings, compliance will most likely handle CARA Logs setting within ARMS for Coaches. Once the approval timeline is set, coach's will be asked to submit the events for to Compliance to approve. The Playing Season Calendar provides the option to submit (Red Box) and see where the events are within the approval process by following the key (Bright Blue Box).



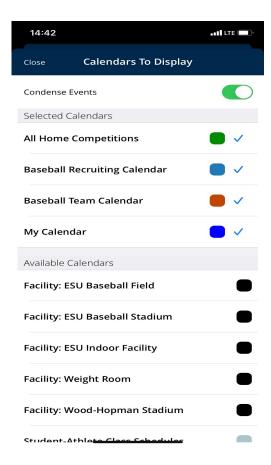
Calendars In the ARMS Mobile App

User's calendars can also be found on the ARMS Mobile App. Users have the option to edit, add, or delete CARA events on their calendar from the mobile app as well as filtering by Calendar to see them each individually or collectively (My, Recruiting, Team, Class Schedules). To see your calendar(s) click on the three horizontal lines in the upper-left hand corner and click on Calendar.

From there you can:

Filter calendar events from the mobile app by:

•Clicking Calendars at the bottom of the Calendar screen; and



•If you want to remove or add a calendar, tap on the calendars name.



Add an event to from the mobile app by:

•Clicking on Calendar, then tap on the "+" in the upper-righthand corner



14:27 Cancel **Add Event** Save EVENT Sport Baseball > > Туре Title ATTENDEES Attendees 1 Attendees > EVENT TIMING All Day Start Date Dec 10, 2021 Start Time 15:00 End Date Dec 10, 2021 End Time 16:00 Repeat Event EVENT DETAILS Facility **Location Description** 15 minutes Reminder

•Add your event details (event type, event

title,

attendees,

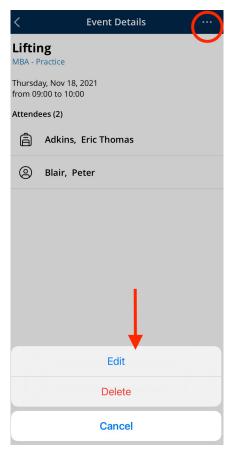
etc.) and hit

save.

Edit/Delete an event to from the mobile app by:

- •Clicking on date of the event you want to edit;
- •Tap on the event name that will populate underneath the Calendar
- •Click on the three dots on the Event Details page and select Edit or Delete



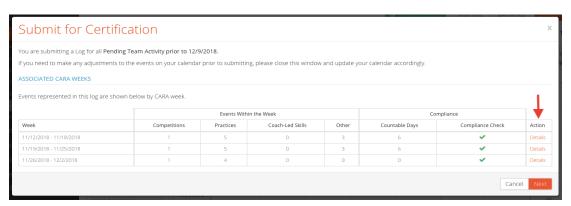


CARA Logs & Approval

The ability to submit CARA Logs is conveniently placed on the Playing Season tab under the Team Module. Every compliance office is different in how and when they want the logs submitted. Compliance will set up a submission timeline (daily, weekly, monthly) that will make events available for coaches to submit. Once they are available to submit, find the CARA Log Submission box to the left of the Playing Season Calendar.



In the CARA Log Review, coaches are able to see the days/weeks/months they are submitting for approval and the information associated within those events. By clicking the **Details**, more information of the events will show. This will show the compliance rules that are being checked off and the individual Student-Athletes who were counted during the events and their hours.



If there are competitions in the Logs being submitted, ARMS will ask coaches to fill out who participated in those competitions. If no competitions were held during the timeline than the review will go right to the next step of the CARA Log Approval.

Team Management

Roster management is another function of ARMS that will be used differently across all users, depending on how each school's Compliance Team wants to handle it. Usually, compliance will handle adding and removing roster members, status changes, and year-to-year changes on a team roster. There are several ways however, to make the Roster tab in ARMS very user friendly and accessible to the information coaches need. Coaches will be able to edit all SA's information on their roster, customize the SA Facets and

Fields in which they search by, and group roster members based on Skills, Position, Classes, etc.

Student-Athlete Fields and Facets

Coaches have the ability to create customized fields and facets to use for Student-Athletes. It is the exact same process as adding Recruit Fields & Facets through the Administration Module. Reference the "*Recruit Fields*" & "*Recruit Facets*" sections under "**Customizing & Grouping within Recruiting in ARMS**", pg. 16 in this manual, to find how to add them.

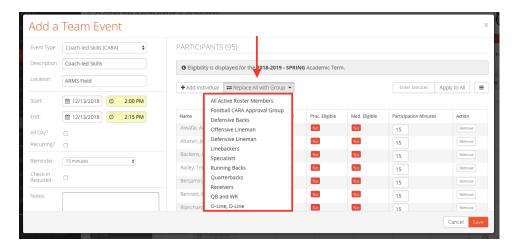
The idea of using SA Fields & Facets is under the same assumption as before. Each team, sport, and coach measures and groups players uniquely. Use these fields and facets for equipment management, team evaluations, year-to-year improvements, positional groupings etc.

SA Fields will appear in SA's Profile, SA Facets will appear in the Roster Management screen under the tab Roster.

Roster Groups

Roster Groups & Searches work the exact same as Recruit Groups in ARMS. The idea of having Groups and Saved Searches for each sports roster has the identical functionality as it does in the Recruit Module. These groups are most utilized in creating events and Team Communication.

- When creating an event, roster groups are available to use as bulk additions for participants in that event
- ARMS will auto-default to the entire Official Roster on a newly created event
- This avoids adding/removing individuals to Events and promotes presubscribed groups to be more efficient
- Can add both Saved Searches and Groups

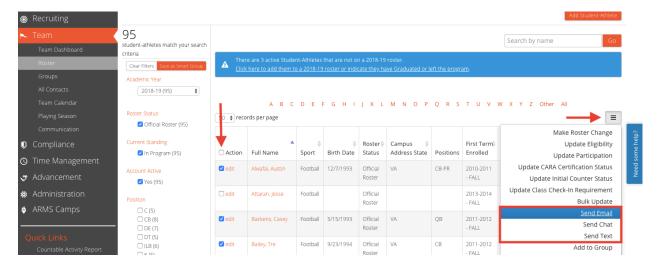


Team Communication

Team Communication is offered in a variety of different platforms on ARMS and the ARMS Mobile App. This provides coaches the access to freely communicate and track communication with their players and staff members. The communication channels ARMS utilizes are Email, Text messaging, ARMS Mobile Chat, and ARMS Announcement. Each platform is different and has its own individual functionality. Coaches should find what is most efficient for themselves and their team to fit their communication needs. Team Communication on ARMS is purposely very similar, in parts the exact same, to communicating with Recruits.

Communication - Roster

Within the Roster Management screen is the ability to communicate with current SA's. By **selecting the SA's** you wish to reach out to and going to the **3 bar action menu**, users can Email, Chat, and Text the selected SA's.

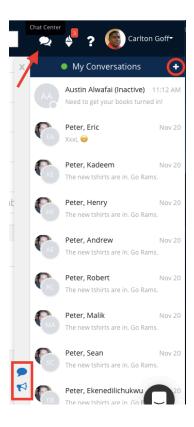


Communication - Groups

Within Student Athlete Groups, communication is a fairly simple. If users want to communicate to the entire group, select **the name of the group** in the Groups tab, click the **3 bar action menu** for your options, and select the **communication feature** you wish to use. If you want to select individuals from a group, click into **the group** and select them **individually**.

Chat/Announcement Communication

In ARMS users can also chat with other users on your Roster or Staff through our ARMS Chat feature. They can receive these messages on their phone or on their computer when logged into ARMS. The 2 chat bubbles next to the ARMS Notification Torch is where the Chat feature lives. To create a message, click the **plus sign** in the right hand corner. Existing conversations are all below as well as the ability to switch between Chat and Announcements.



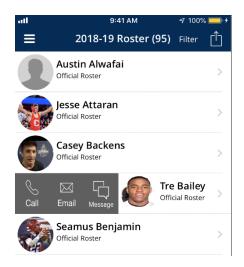
Communication – ARMS Mobile App

On the ARMS Mobile App, the same features to communicate with Team Roster, Staff, and Groups are available as on the desktop. Within the Team Management Module in the ARMS Mobile App these features are a click away.

- Team Roster, Roster Groups, and Staff are all available to scroll through.
- Each Communication feature is easily found as an option by clicking the **action button** in the top right hand corner of the screen

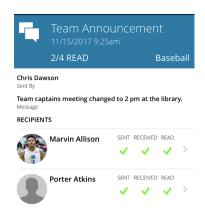


 Connect with individuals by sliding right on their name to reveal communication options as well



Different Types of Communication

• **Announcement** — Can only be from ARMS user to ARMS user and is a function of the chat feature in ARMS and on the ARMS Mobile APP. In this, message senders can see if the announcement was sent, if an individual received the announcement, and if they read the announcement (opened the message). Do this by clicking **into the announcement** on both the ARMS Mobile APP and Online.



- **Chat** Chat will be only from ARMS user to ARMS user over either the ARMS Mobile App or ARMS online. Chat allows users to communicate back and forth with an individual. Players cannot start a Chat, but once a coach or administrator initiates, players can respond back whenever.
- **Email** Email is general email. The recipients will receive the email in their email inbox and be able to reply to you from there as well.

• **Text** – The Text option is not through the ARMS Mobile App and is an outsourced communication method. This will send a text to the SA's/user's designated Mobile phone. It will not use the sender's number to communicate; therefore they cannot send a Text back to the sender at that number. It will come to the SA/user as a normal SMS text message to their phone.