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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:

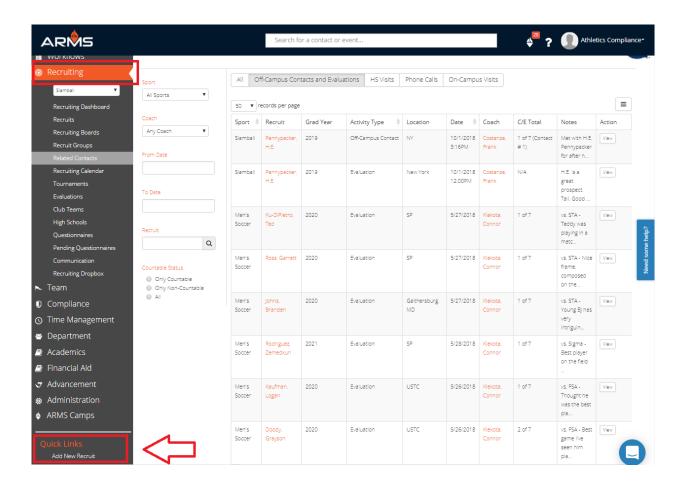
Inputting a recruit into your system → tracking your recruiting activity for that recruit



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.

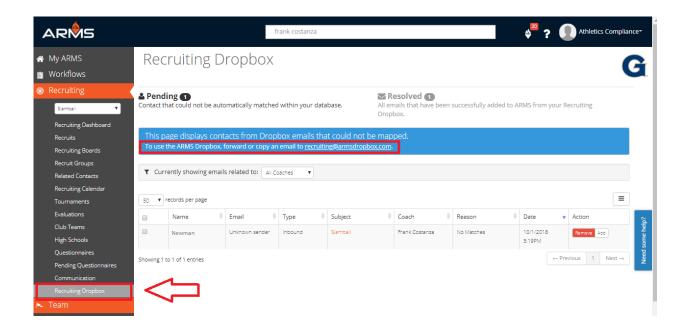
3.) Add a recruit via the Recruiting Dropbox

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

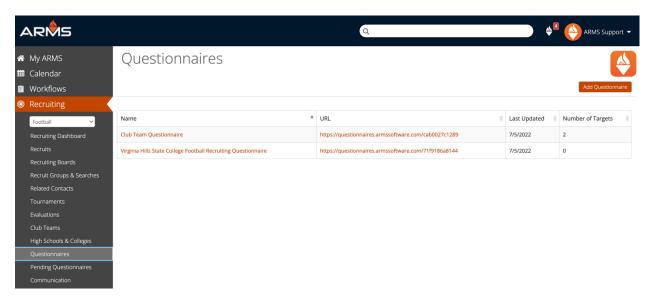


As stated above, once a recruit is "added" from the "Pending" tab, that recruit is now in your system and will appear in the "Resolved" section in the dropbox.

4.) Add a recruit by Questionnaire

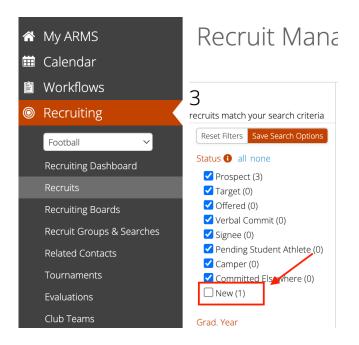
Questionnaires can be made available to recruits by linking a questionnaire to a sport's webpage on the School's Athletic Website, putting the questionnaire link in the coach's email signature, or through direct communication to recruits.

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



PSA Questionnaire Submission

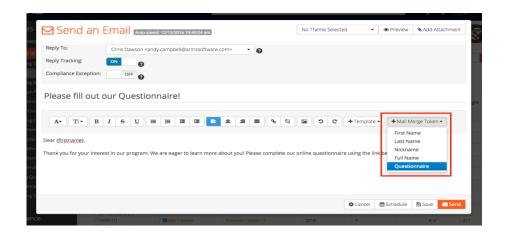
When a questionnaire is completed by a PSA, there are two ways we enter them into the database. First, is an already existing recruit fills out the questionnaire, and the information they provide matches an existing profile in your recruiting database. In this case ARMS will automatically map the questionnaire 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.

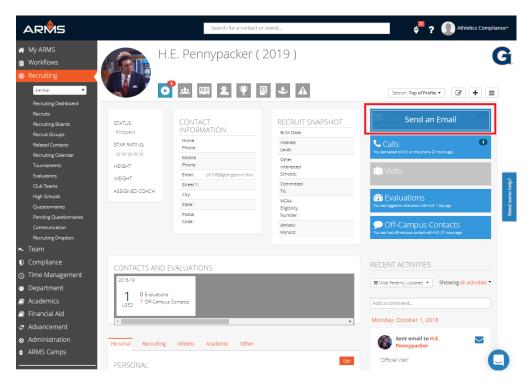
Emailing Questionnaires

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.



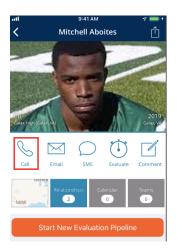
• The other way is by accessing the recruit's profile through the ARMS Mobile App and sending an email through their profile.



- **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.



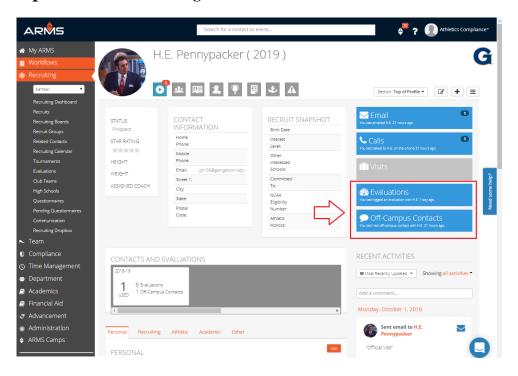
• On the ARMS Mobile App you can Log A Call and also make calls directly out of the App. To do this find the recruits profile, click on the phone icon widget **Call**.



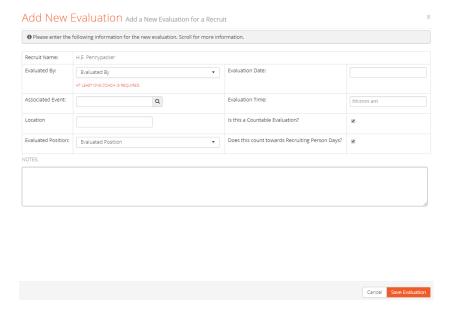
• This will lead you to the menu choices of making an outbound call, or logging a previously made call. ARMS will notify you if you are making any violations by making the call or if you have the green light to call away.



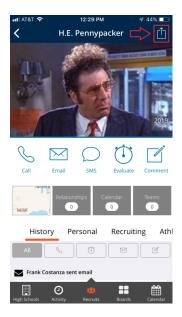
- **3) Off-campus Contacts or Evaluations:** Logging of all off-campus contacts or evaluations can be completed via either computer or the ARMS Mobile App.
 - The easiest way to record an off-campus contact or evaluation is by accessing the recruit profile from your computer and selecting either **Evaluations**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



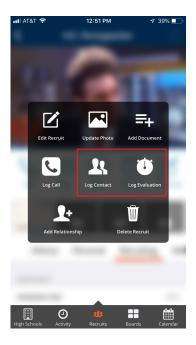
 From here, either an evaluation or contact form will appear wherein there are boxes to fill in the appropriate information regarding the evaluation/contact and save.



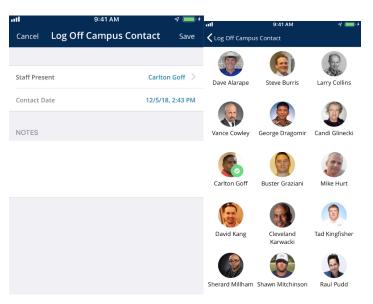
Also record an evaluation or off-campus contact right from your phone. Simply
access the recruit's profile and click the top right icon



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

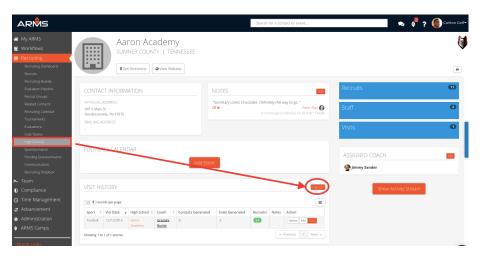


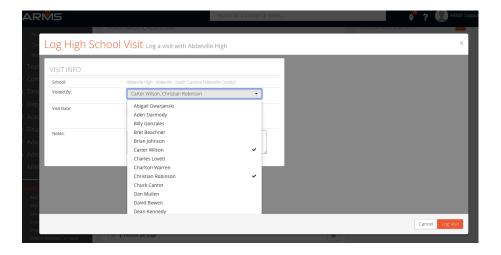
- The ARMS Mobile App can also log multiple coaches on a contact. The "Staff Present" selector will pull directly from the team's staff list and allow multiple members of your coaching staff to be selected.
- Be aware that the date is auto filled for the day the log is created. If logging the contact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

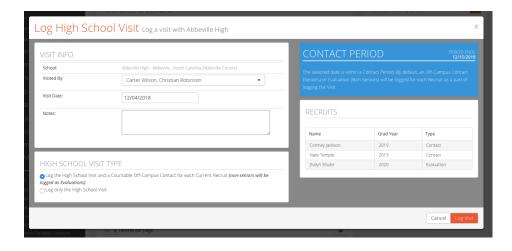


During the Contact Period, there is the ability to log contacts through the High School's profile page on the computer or the ARMs Mobile App (iPhone only). When logging from the High School page, our system is designed to identify "Grad Year", so it will log Contacts to all High School Seniors, while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

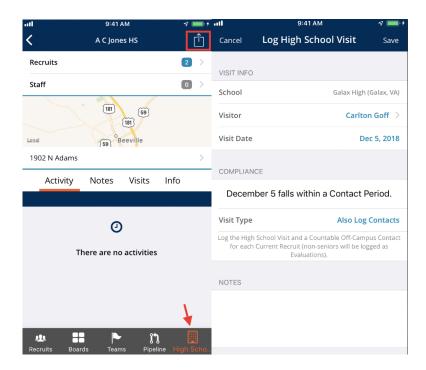




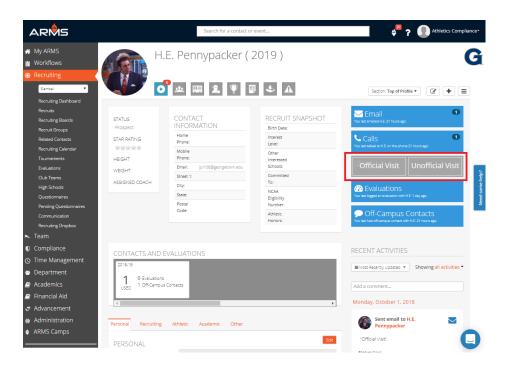


On the ARMS Mobile APP

- 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



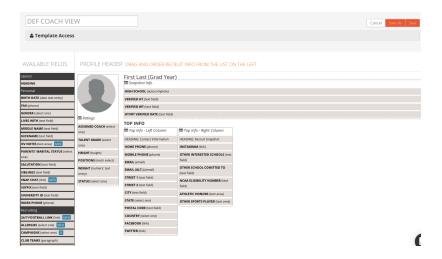
Custom Views

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.



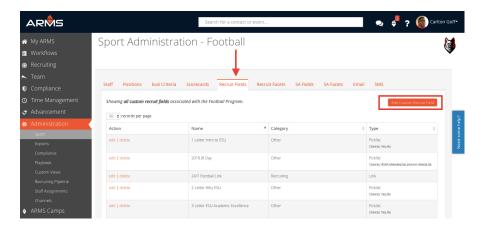
- In the Custom Veiws screen, drag and drop information from the "Available Fields" to the "Profile Header" to put them in the Profile View.
- You can drag and drop within the columns as well to change the order of the recruit fields
- To remove a field, drag and drop from the columns to the grey "Available 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"



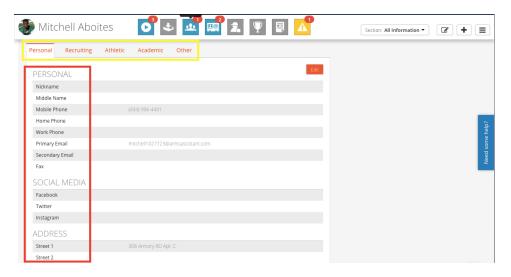
Recruit Fields:

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.)



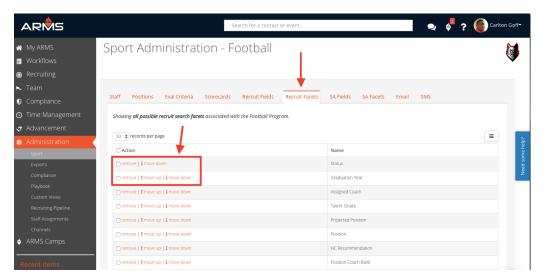
• In a recruits profile, at the bottom of the page, is where the Recruit Fields (Red Box) and their Categories (Yellow Box) are located.



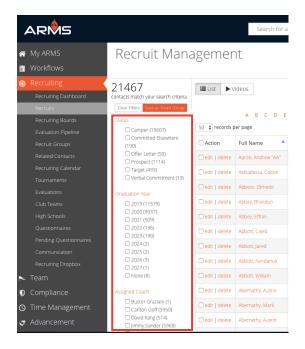
Recruit Facets:

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

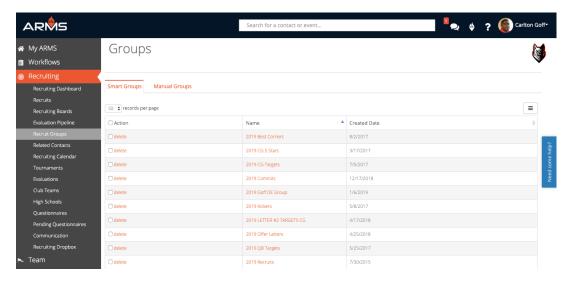


Recruit Groups & Searches:

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

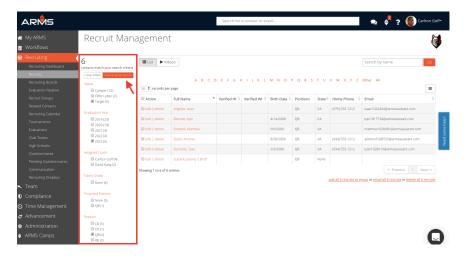
Saved Searches are from the Recruit Management screen when sorting the Recruit Facets available on the left hand side of the screen. They will adjust as the Fields/Facets of the recruits are adjusted. (I.e. 2023, 5 Star, Quarterbacks, Who Live in Texas).

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



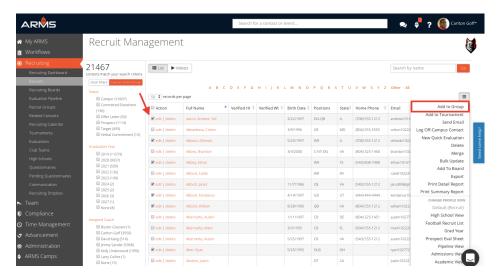
To Make a Saved Search

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.

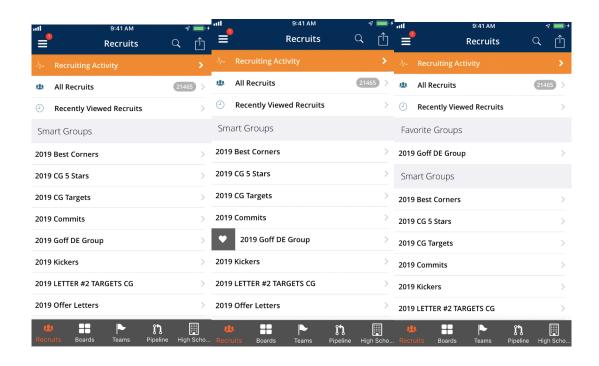


To make a Group

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

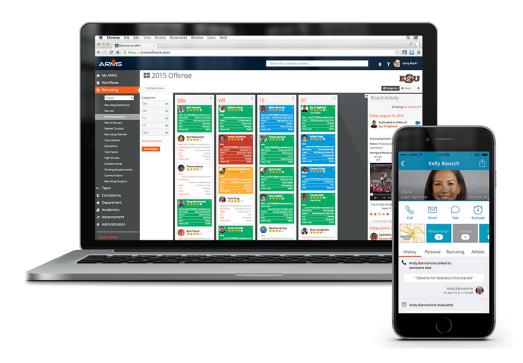
Team & Roster Management Overview

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

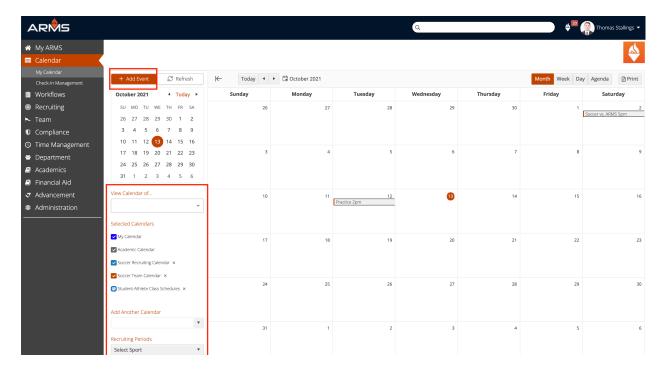


Playing Season/Calendar:

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.

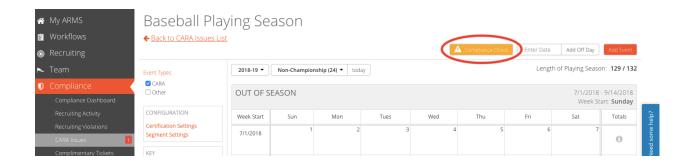


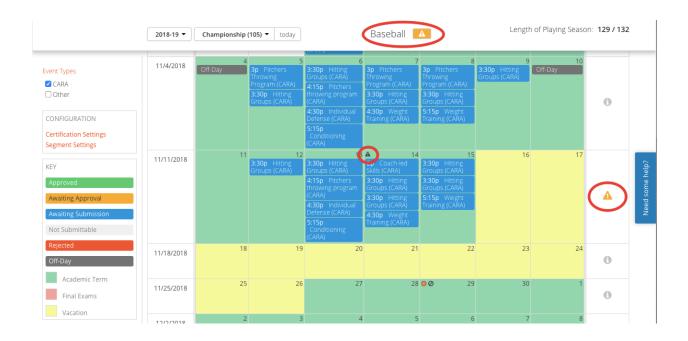
Playing Seasons Calendar

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.

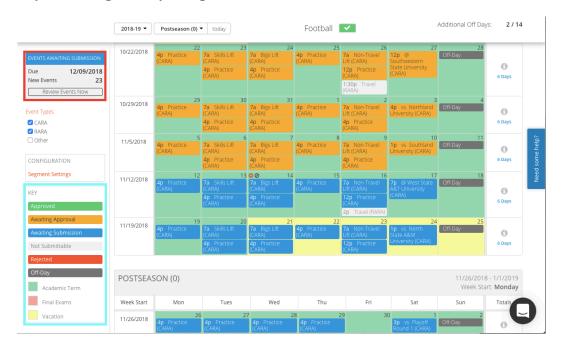
The Playing Season Calendar is more interactive and has Compliance features within the calendar. The only thing the Playing Season Calendar will not show is the team's Academic Courses.

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).



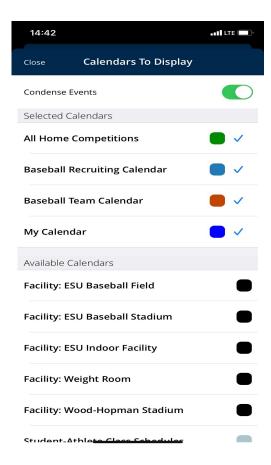
Calendars In the ARMS Mobile App

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,

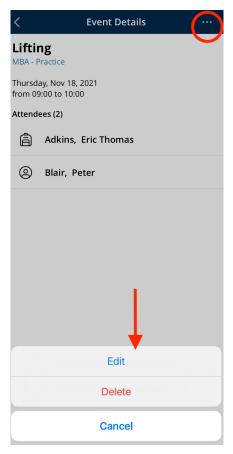
etc.) and hit

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



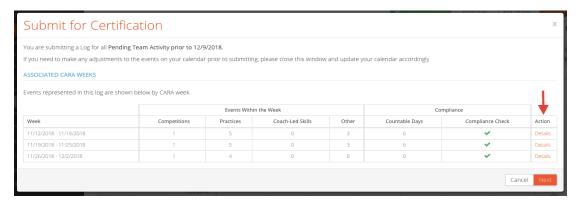


CARA Logs & Approval

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.

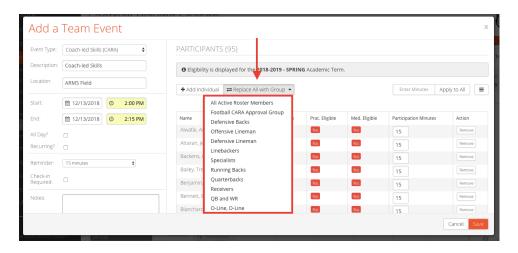
The idea of using SA Fields & Facets is under the same assumption as before. Each team, sport, and coach measures and groups players uniquely. Use these fields and facets for equipment management, team evaluations, year-to-year improvements, positional groupings etc.

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

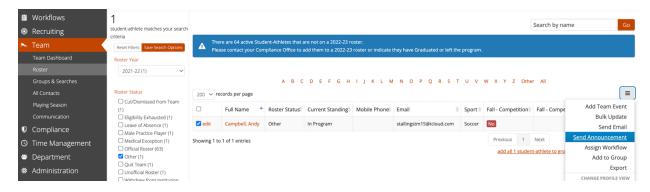


Team Communication

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. These channels will all be used through what we call an ARMS Announcement.

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**, to select SEND ANNOUNCEMENT



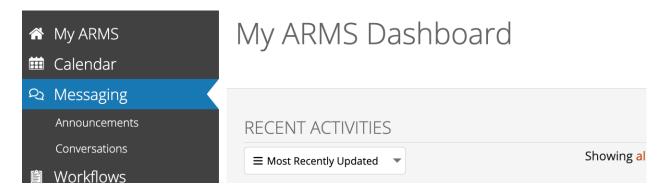
Communication - Groups

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**

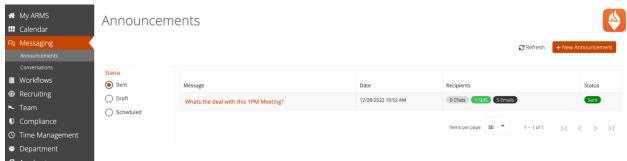
feature you wish to use. If you want to select individuals from a group, click into **the group** and select them **individually**.

Messaging Module

In ARMS you will be able to see previous conversations and announcements sent, details on those messages, and scheduled/drafted messages as well. This all can be found under MESSAGING.

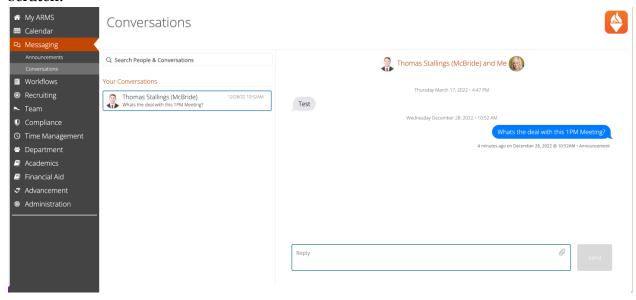


Announcements (Messages sent to multiple recipients) will display all previous announcements, the scheduled/ draft versions you have created, as well as the ability to create a new announcement from scratch.



Conversations will display all of the individual message threads you have with Current SA's and Staff members, as well as the ability to start an individual message from

scratch.

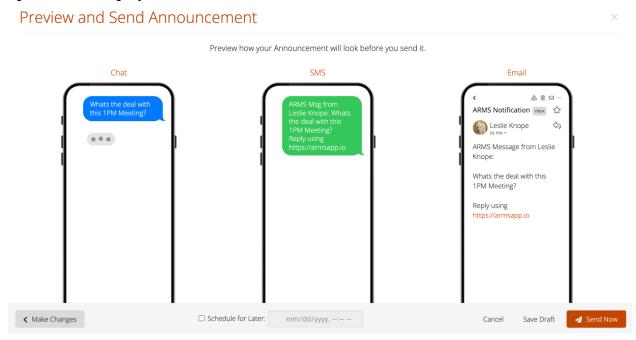


When composing a message, you will be able to select Recipients, include links and attachments with the announcement you are sending.



Once composed use the PREVIEW option to view this announcement and the methods this message will be delivered. We encourage all SA's and Staff to download and login to the ARMS Mobile app daily for the best messaging experience! If a user has logged into the mobile app within the last 7 days, they will receive an in-app chat. This will come across as a direct message for them to slide into, view the messages and

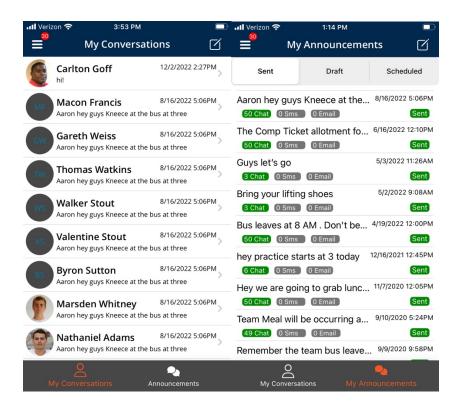
links/attachments, and respond. If they have not logged into the app within the last 7 days but have a mobile phone # on their profile, we will send this announcement via text. If they have not logged into the app in 7 days nor have a mobile phone # on their profile, we will send the announcement via email. This preview screen will outline all 3 options and display which users will receive the announcement in each manner.



Communication – ARMS Mobile App

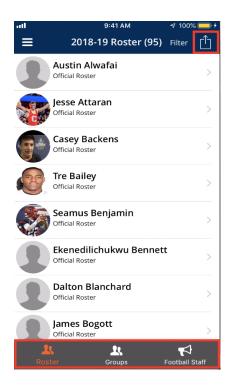
On the ARMS Mobile App, the same features to communicate with Team Roster, Staff, and Groups are available as on the desktop. On your Dashboard you will have an "Unread Messages" and "New Announcement" widget you can use to short cut to your messages.

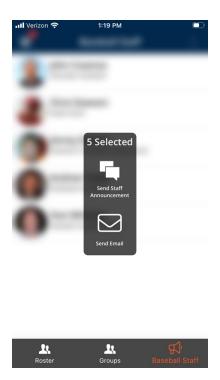
You will also be able to navigate to the 3 lined menu to go to the MESSAGING module to see previous announcements and current conversations. From these screens the box and pen in the top right hand corner is how you create a new message from scratch.



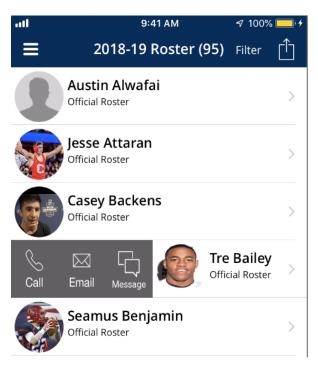
Within the Team Management Module in the ARMS Mobile App these features are a click away.

- 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

- If the recipient has installed and used the app in 7 days then the announcement will be sent to them via an in-app message (Direct message like any other app on their phone)
- If they have not logged into the app in 7 days, they will receive this announcement via SMS, if they have a mobile number on their profile.
- The final option is Email. If they do not have the app and do not have a mobile number saved on their profile, then we will send them an email.