Teamworks Training

Committee Leadership

WELCOME TO TEAMWORKS

What is Teamworks? An on-line volunteer communication and scheduling platform.

Who has access to Teamworks? Chairmen, Assistant Chairmen & Hole Captains

How will it help me?

   View a roster of all the volunteer's designated committee.

   View a volunteer's application information, including contact information and schedule selection.

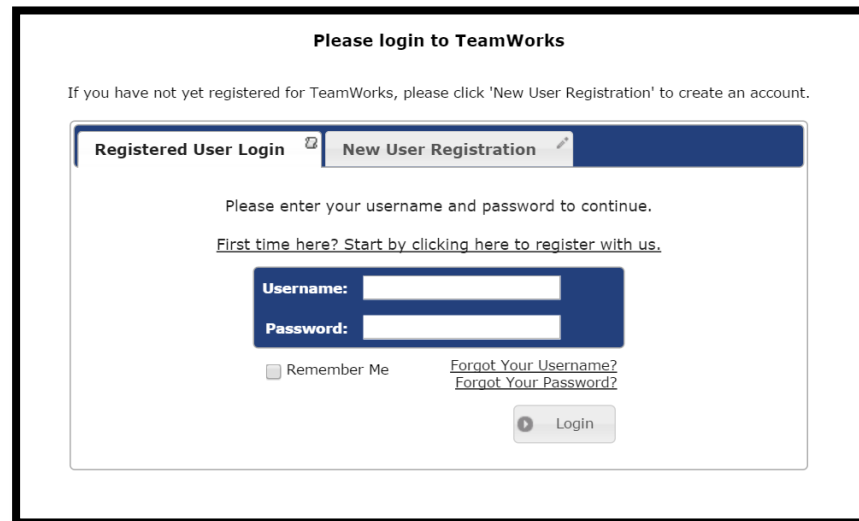   Email volunteers, individually or as a group, directly from Teamworks.

   Drag and drop volunteers into a schedule.

   Review and print schedules and other reports.

   Provide volunteers the opportunity to create a Teamworks account and view their schedule online.

- Go to teamworks.r2it.com

- Click on the "New User Registration" Tab.
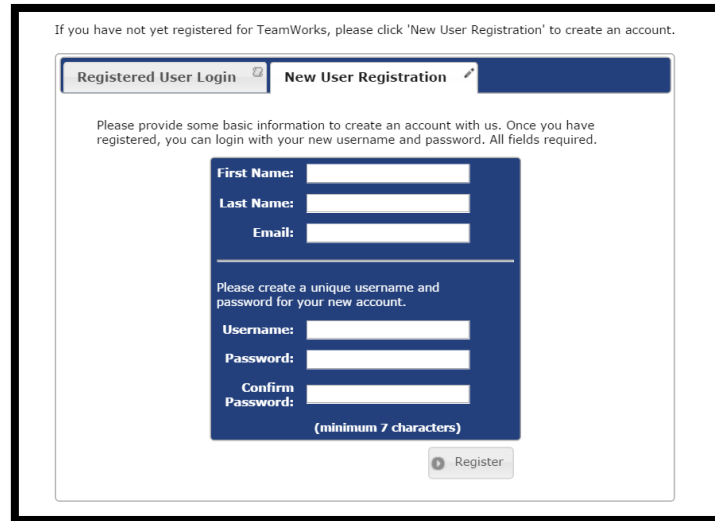
Please login to TeamWorks

If you have not yet registered for TeamWorks, please click 'New User Registration' to create an account.

Registered User Login	New User Registration

Please enter your username and password to continue.

First time here? Start by clicking here to register with us.

Username:
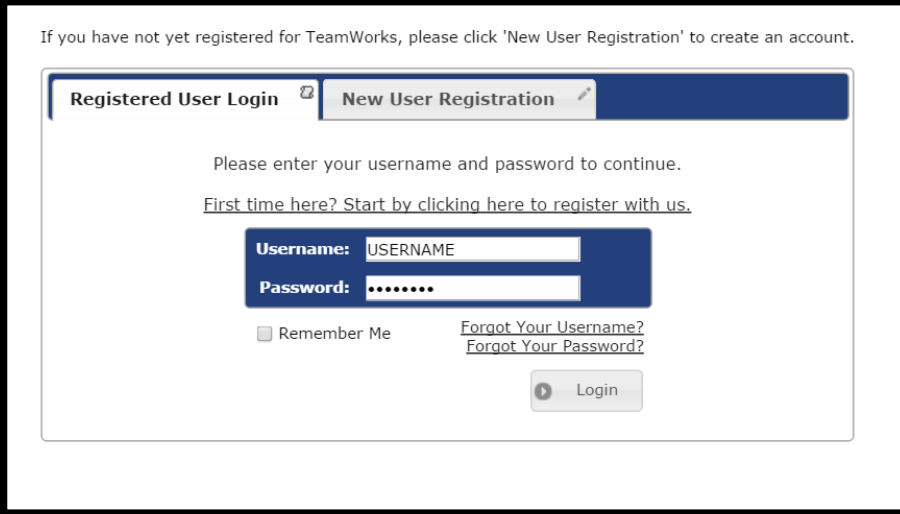Password:

☐ Remember Me
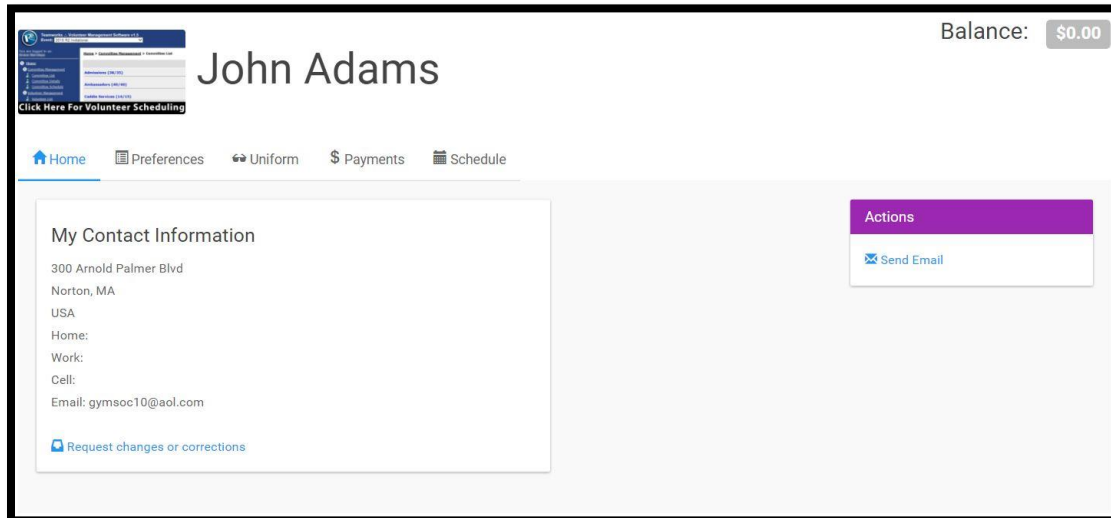
Forgot Your Username?
Forgot Your Password?

Login

Note: If possible, utilize Google Chrome (🌐). Teamworks will work in Explorer and Firefox, as well, but the reports seem to show best in Google Chrome.

CREATING AN ACCOUNT

- Fill in the "New User Registration" form.

- When filling in your email, you must enter the email that you used when completing your volunteer application.

- Create username and password of your choice.

Note: If possible, utilize Google Chrome (   ). Teamworks will work in Explorer and Firefox, as well, but the reports seem to show best in Google Chrome.

CREATING AN ACCOUNT

- You should receive an email confirming your account.

- Go back to teamworks.r2it.com and use the "Registered User Login" tab. *Please note, if you forget your username and password at a later date, please select the "forget your username or password"*

Note: If possible, utilize Google Chrome ( ). Teamworks will work in Explorer and Firefox, as well, but the reports seem to show best in Google Chrome.

HOMEPAGE

- Once you log-in, you will have a welcome page that features your profile.

- This page is the same for everyone!

- If you need to send an email to the tournament office, please click the "send email" button.

- To view your contact information, preferences, uniform, payment or schedule, please select the appropriate tab.

  o To make a change to contact information, please click "request changes or corrections". Please choose to email the tournament office.

  o To purchase additional items, please click the "uniforms" tab and then "request additional items". Please email MitziBledsoe@pgatourhq.com.

  o If any changes need to be made to your registration, please email MitziBledsoe@pgatourhq.com.

THREE CORE SECTIONS

1. **Committee Management**: View information and schedule for entire committee.

2. **Volunteer Management**: Access individual volunteer's profiles and schedules.

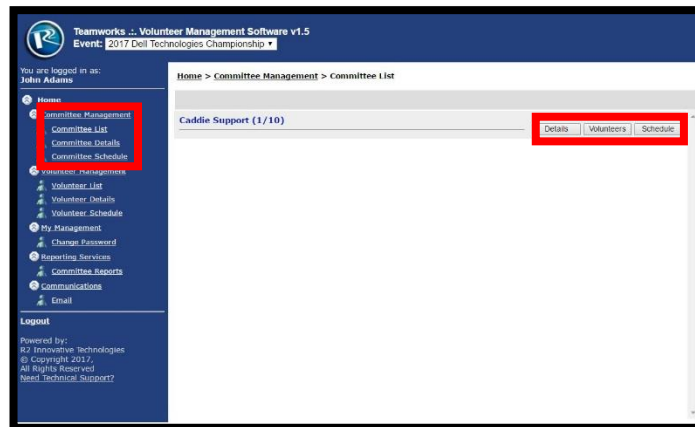3. **Reporting Services:** Generate reports for committee schedules.
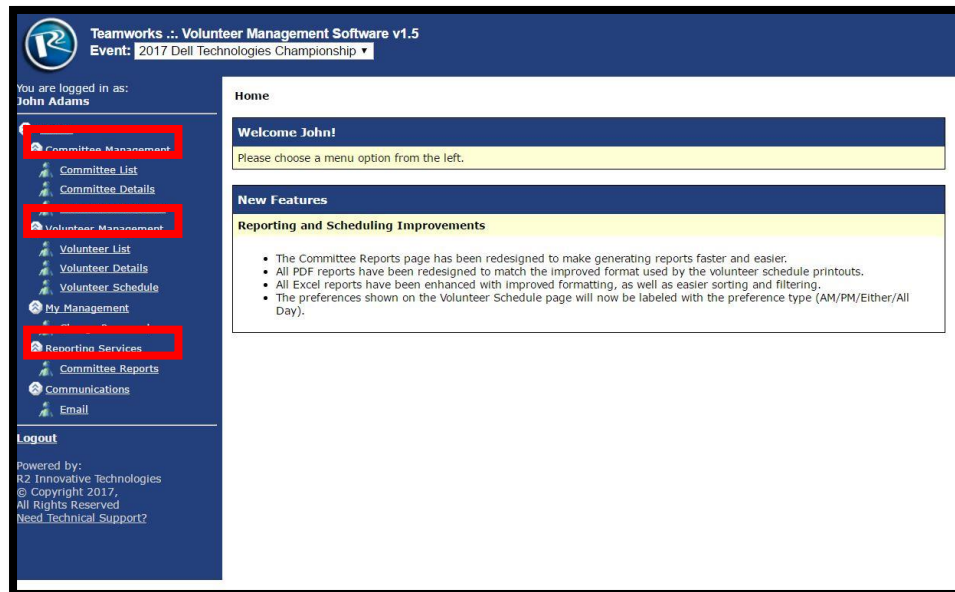
COMMITTEE MANAGEMENT

- Click on "Committee Management" to see your committee detail.
- There are two menu options: Navigation Bar (Left), Committee Menu (Right)
  - Choose "Details" or "Committee Details" to view committee's summary.
  - Choose "Volunteers" or to view the committee roster.
  - Choose "Committee List" to view your committee detail *(same page as "Committee Management")*
  - Choose "Schedule" or "Committee Schedule" to view and adjust daily schedules for the designated volunteer.

  Please note, if you oversee multiple committees, they will all be listed out below.

COMMITTEE DETAILS PAGE

VOLUNTEERS PAGE

- When you click on "Volunteers" on the Committee Management page, it will direct you to the "Volunteer List" page.

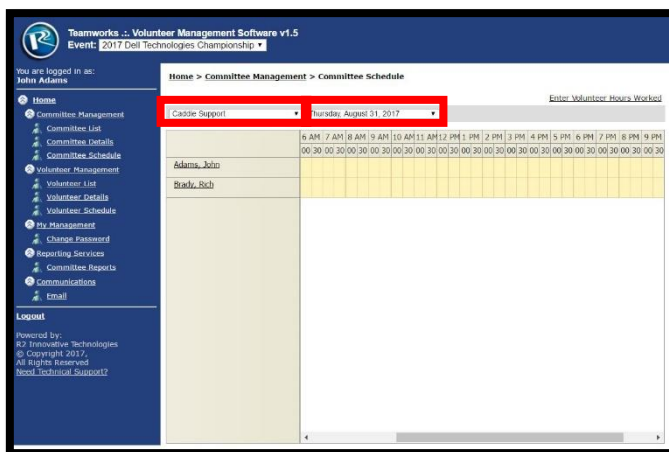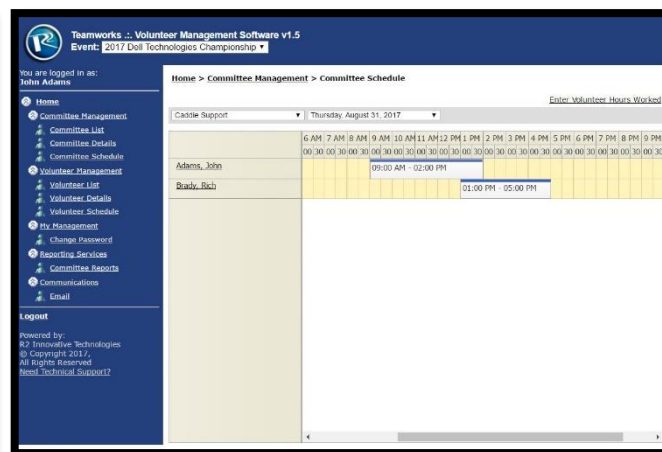# COMMITTEE SCHEDULE PAGE

- View the daily schedule of all your volunteers.

- Choose a specific date in the drop-down on the top right.

- This page is a good resource, and best viewed, once volunteers have been scheduled.

Please note, if you oversee multiple committees, you can chose each committee from the drop-down on the top left .

Before Scheduling   **After Scheduling**

VOLUNTEER LIST

- Click on "Volunteer Management" or "Volunteer List" to see view and manage your committee's volunteers *(both links will direct to the same page).*

- Once a committee has been chosen from the drop-down on the top left, a full roster of that committee's volunteers will appear.

- There are two menu options: Navigation Bar (Left), Committee Menu (Right)

  Choose "Details" or "Volunteer Details" to view a specific volunteer's profile.

  Choose "Schedule" or "Volunteer Schedule" to view a specific volunteer's schedule preferences and to schedule volunteers.

VOLUNTEER DETAIL

- View all the information that was captured on the original Volunteer Application and has been added to their R2 Database profile.

- This information cannot be updated on Teamworks, only in the R2 Database. Please contact Mitzi Bledsoe with any requested updates.

VOLUNTEER SCHEDULE

- View a designated volunteer's weekly schedule and confirm in TeamWorks.

- Choose the committee and specific volunteer from the drop-down on the top navigation bar.

- The key on the far right outlines the significance of the colors on the schedule.

VOLUNTEER SCHEDULE: PREFERENCES

- Schedule will appear for Saturday, 7/20 – Monday, 7/29
- Each volunteer's profile will highlight their chosen schedule in a YELLOW box.
  - The schedule blocks shown in TeamWorks were established by each Committee Chairmen to fit specific committee needs

VOLUNTEER SCHEDULE: PREFERENCES

- All volunteers provided their exact schedule as part of the application process.

- Use the volunteer's selected schedule to confirm the schedule for your committee.

VOLUNTEER SCHEDULE: SCHEDULING

- To confirm a volunteer's schedule, click on the start time in spreadsheet and drag the mouse down to the shift end time.

  Ex: If a volunteer has elected to work from 8am – 1pm on Friday, 7/26 click on the line that starts at 8am and drag to the line directly above 1pm on the spreadsheet.

- Once times have been selected for a specific day, a BLUE box will appear on the spreadsheet that highlights the times a volunteer has been scheduled.

VOLUNTEER SCHEDULE: SCHEDULING

- If you need to remove a scheduled time for a volunteer, click the "X" in the top right of the BLUE box.

- If you want to shorten or lengthen the volunteer's scheduled time, roll over the bottom of the BLUE box and drag up or down as needed.

- If a volunteer has been scheduled in another committee, a RED box will appear when you select their name.

VOLUNTEER SCHEDULE: SCHEDULE CHANGES
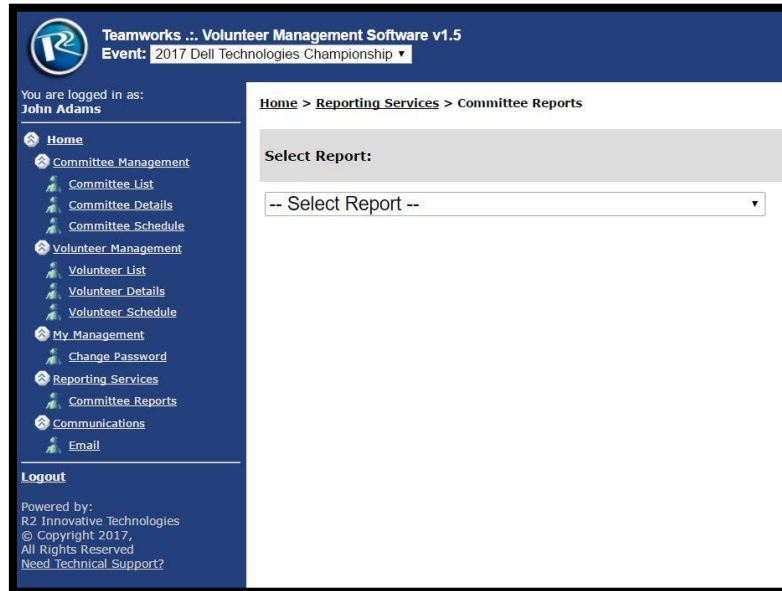
- Each committee will have a unique daily schedule and shift times, reflected in your Teamworks schedule.

- Teamworks reports are set-up in the shifts chosen by the Committee Chair for each committee

- If a volunteer elects to cancel/change shifts, coverage should be extended to the existing committee prior to assistance from Mitzi Bledsoe to re-open committee
  - EX: If a volunteer cancels, please reach out to the rest of the committee volunteers to cover that shift. No new volunteers will be added until all existing volunteers have been asked.

REPORTING SERVICES

- Click on "Reporting Services" or "Committee Reports" to see the different committee report options *(both links will direct to the same page).*

- Choose a report for the select committee in the drop-down.

REPORT DESCRIPTIONS

1. **Assignments (All – By Name):** Alphabetical list of all volunteers and their committee assignment (pdf).

2. **Assignments (All – By Committee):** All volunteers listed out on each committee (pdf).

3. **Availability*:** Availability of volunteers on a designated committee to work, by day, by time frame (pdf).

4. **Check-in List*:** Alphabetical check-in list of all volunteers for the designated committee, per day (pdf & excel).

5. **Check-in Report**: Alphabetical check in list of all volunteers for multiple days (pdf & excel).
   If you oversee multiple committees, this report will list out all of your volunteers on each committee.

6. **Committee Preferences:** Committee preferences for designated volunteers (pdf & excel).

7. **Contact List*:** Alphabetical contact list for designated committee (pdf & excel).
   If you oversee multiple committees, this report will list out all of your volunteers on each committee.

*Most commonly used reports.

Note: If possible, utilize Google Chrome ( ). Teamworks will work in Explorer and Firefox, as well, but the reports seem to show best in Google Chrome.

REPORT DESCRIPTIONS

8. **Daily Schedule*:** Schedule of all volunteers for the designated committee, by day (pdf).

9. **Preferences*:** Report of all volunteers for designated committee and their shift availability to work during tournament week (pdf).

10. **Schedule*:** Report of all volunteers for the designated committee and their schedule for tournament week (pdf).

11. **Volunteer Scheduling Notes**: Alphabetical list of all volunteers including years experience, request for scheduling with another volunteer, etc. (pdf & excel).

*Most commonly used reports.

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EMAILS

- Click on "Communications" to send an email. You have the ability to customize the email and send it to one or multiple volunteers.

  - If you want to save a copy of the email, please check "send me a copy". There is no outbox that saves out going emails.

  - If you want to upload a file, please select "choose file".

  - All emails will be sent from the email the chairman or captain registered with.

  - If you are sending a long email, it is recommended that you type the email into Microsoft Word and then copy it to message box.
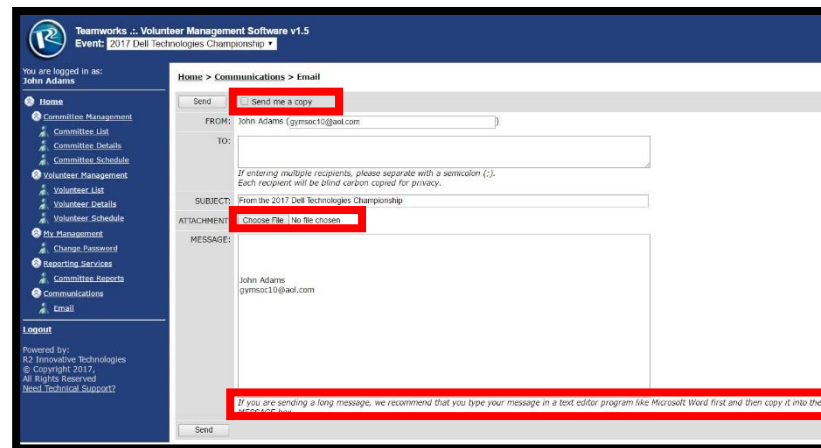
POST EVENT

- Following the event, please enter in the number of hours your volunteers worked. To enter in that information, please follow the following steps:

    - Click on "Committee Schedule" and then "Enter Volunteer Hours Worked" in the top right.

    - A box will then pop up where you can enter in the hours work for each volunteer. Please complete this by Saturday, August 9th.

QUESTIONS?

Contact Grace Marquis, R2IT Support

gmarquis@r2it.com

Office: (800) 660- R2IT (7248) x 714