



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.

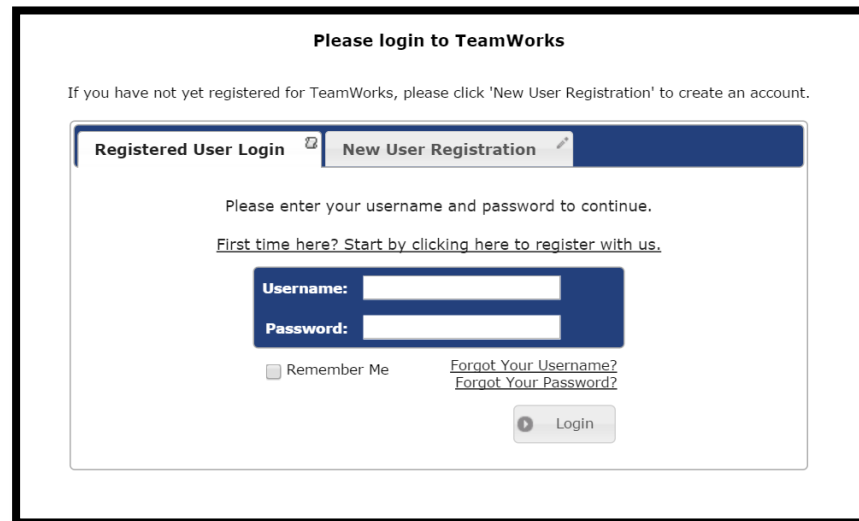
Drag and drop volunteers into a schedule.

Review and print schedules and other reports.


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

# CREATING AN ACCOUNT

- Go to [teamworks.r2it.com](http://teamworks.r2it.com)
- Click on the “New User Registration” Tab.

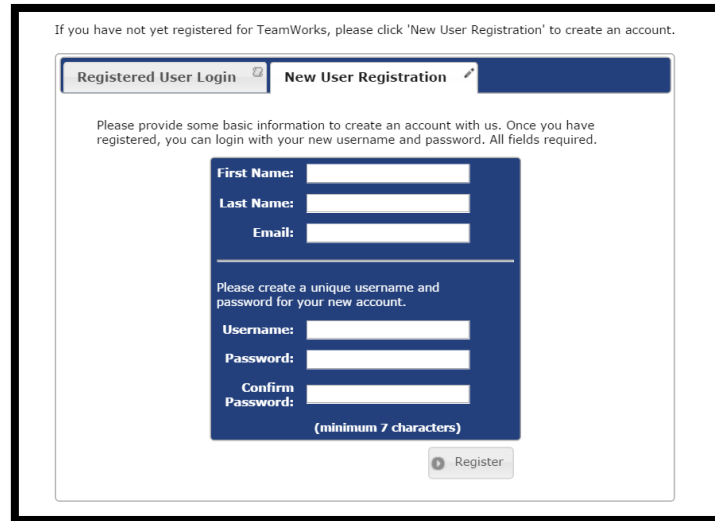


The screenshot shows a web page titled "Please login to TeamWorks". Below the title is a message: "If you have not yet registered for TeamWorks, please click 'New User Registration' to create an account." There are two tabs: "Registered User Login" and "New User Registration", with the latter being selected. Below the tabs, the text reads: "Please enter your username and password to continue." and "First time here? Start by clicking here to register with us." There are two input fields: "Username:" and "Password:". Below the "Remember Me" checkbox, there are two links: "Forgot Your Username?" and "Forgot Your Password?". A "Login" button is located at the bottom right of the form.

**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.



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

Registered User Login

Please provide some basic information to create an account with us. Once you have registered, you can login with your new username and password. All fields required.

First Name:

Last Name:

Email:

---



Please create a unique username and password for your new account.

Username:

Password:

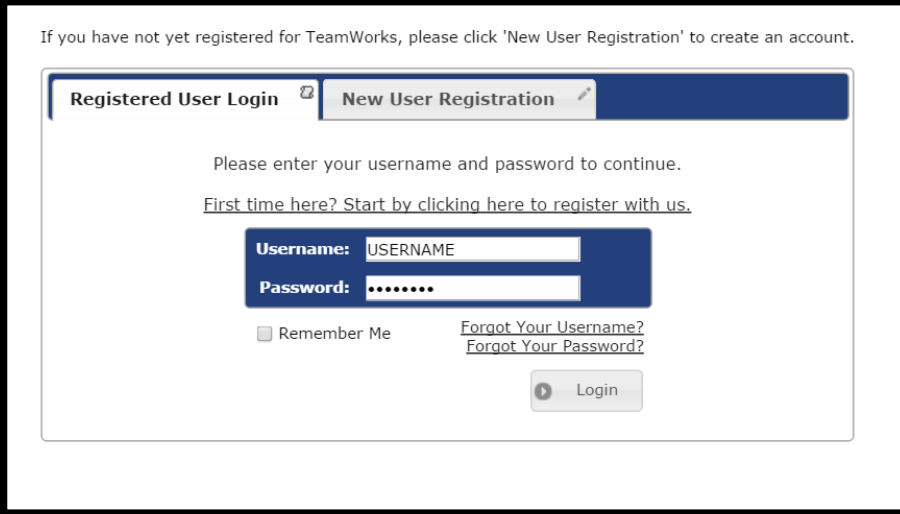
Confirm Password:

(minimum 7 characters)

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

# CREATING AN ACCOUNT

- You should receive an email confirming your account.
- Go back to [teamworks.r2it.com](http://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”*



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:

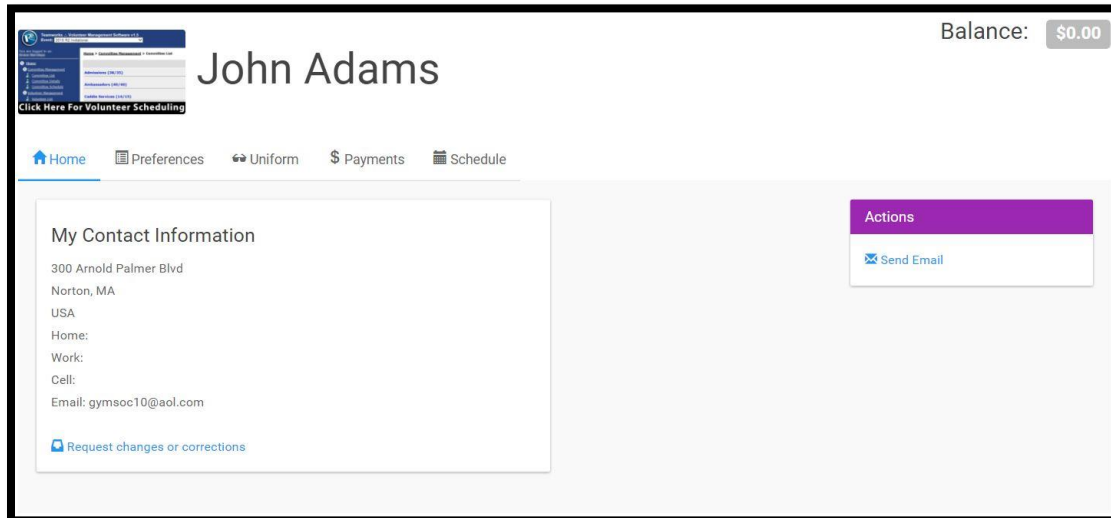
Remember Me

[Forgot Your Username?](#)  
[Forgot Your Password?](#)

**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.



The screenshot shows a user profile page for John Adams. The page includes a navigation menu with links for Home, Preferences, Uniform, Payments, and Schedule. The main content area displays contact information and an Actions menu with a Send Email button.

Balance: \$0.00

## John Adams

[Click Here For Volunteer Scheduling](#)

[Home](#) [Preferences](#) [Uniform](#) [Payments](#) [Schedule](#)

### My Contact Information

300 Arnold Palmer Blvd  
Norton, MA  
USA  
Home:  
Work:  
Cell:  
Email: gymsoc10@aol.com

[Request changes or corrections](#)

### Actions

[Send Email](#)

# HOMEPAGE

- To view your contact information, preferences, uniform, payment or schedule, please select the appropriate tab.
  - To make a change to contact information, please click “request changes or corrections”. Please choose to email the tournament office.
  - To purchase additional items, please click the “uniforms” tab and then “request additional items”. Please email [MitziBledsoe@pgatourhq.com](mailto:MitziBledsoe@pgatourhq.com).
  - If any changes need to be made to your registration, please email [MitziBledsoe@pgatourhq.com](mailto:MitziBledsoe@pgatourhq.com).

The screenshot shows a user profile for John Adams with a balance of \$0.00. The 'Uniform' tab is active, displaying a table for the 'Women's Chair Package' and an 'Additional Items' section.

Item	Size	Quantity
Women's Chairman Shirt	M	1
Women's Jacket	M	1
Hat		1

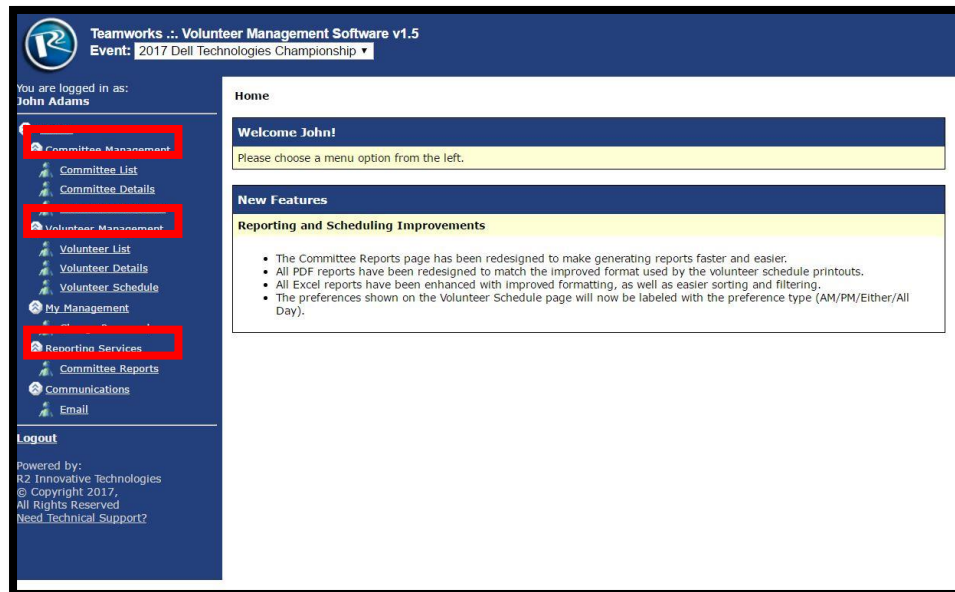
  

Item	Size	Quantity	Price
------	------	----------	-------

[Request additional items](#)

# 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.

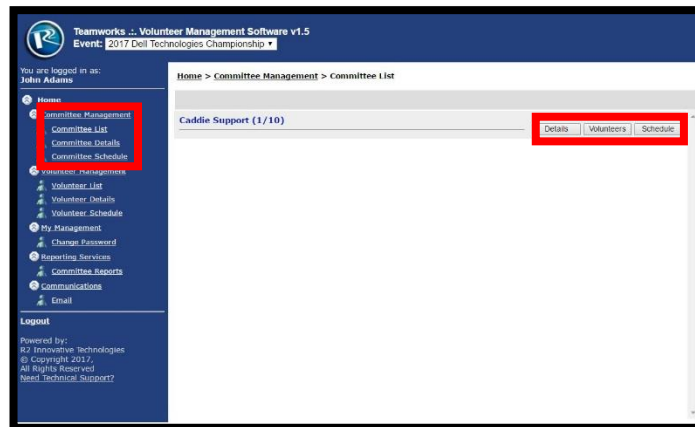




# COMMITTEE MANAGEMENT

- 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

The screenshot displays the 'Teamworks .. Volunteer Management Software v1.5' interface. At the top, the event is set to '2017 Dell Technologies Championship'. The user 'John Adams' is logged in. The left sidebar contains a navigation menu with options like 'Home', 'Committee Management', 'Volunteer Management', and 'My Management'. The main content area shows the 'Committee Details' for 'Caddie Support', including its capacity (10), status (True), and chairman (John Adams). There are buttons for 'Volunteers' and 'Schedule'.

Teamworks .. Volunteer Management Software v1.5  
Event: 2017 Dell Technologies Championship

You are logged in as:  
**John Adams**

Home > Committee Management > Committee Details

Caddie Support

**Caddie Support**

Description:  
Capacity: **10**  
Status: **True**  
Chairmen: **John Adams;**

Volunteers Schedule

Powered by:  
R2 Innovative Technologies  
© Copyright 2017,  
All Rights Reserved  
[Need Technical Support?](#)

# VOLUNTEERS PAGE

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

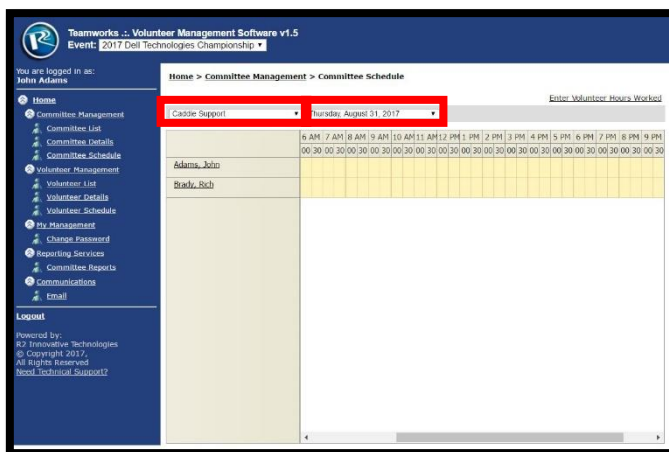
The screenshot displays the 'Volunteer List' page within the 'Teamworks :: Volunteer Management Software v1.5' interface. The page is titled 'Home > Volunteer Management > Volunteer List'. At the top, it shows the event '2017 Dell Technologies Championship' and the user 'John Adams' is logged in. The left sidebar contains a navigation menu with options like 'Home', 'Committee Management', 'Volunteer Management', and 'My Management'. The main content area shows a list of volunteers with columns for Name, Location, Home, Work, Cell, and Email. Two volunteers are listed: John Adams and Rich Brady. Each entry has 'Details' and 'Schedule' links. The page also includes a 'Select All' checkbox, 'Send Email', and 'Send Schedules' buttons, and a 'Volunteer Count: (1/10)' indicator.

Home > Volunteer Management > Volunteer List					
Caddle Support					
<input type="checkbox"/> Select All <input type="button" value="Send Email"/> <input type="button" value="Send Schedules"/>					
Volunteer Count: (1/10)					
Sort By: Name					
<input type="checkbox"/>	Adams, John (C)	(02/06/2017)			
Home:	Work:	Cell:	Email:	Location:	
			gymsock10@aol.com	<a href="#">Details</a> <a href="#">Schedule</a>	
<input type="checkbox"/>	Brady, Rich	(02/06/2017)			
Home:	Work:	Cell:	Email:	Location:	
		(508) 285-8333	carolynromano@pgatourhq.com	<a href="#">Details</a> <a href="#">Schedule</a>	

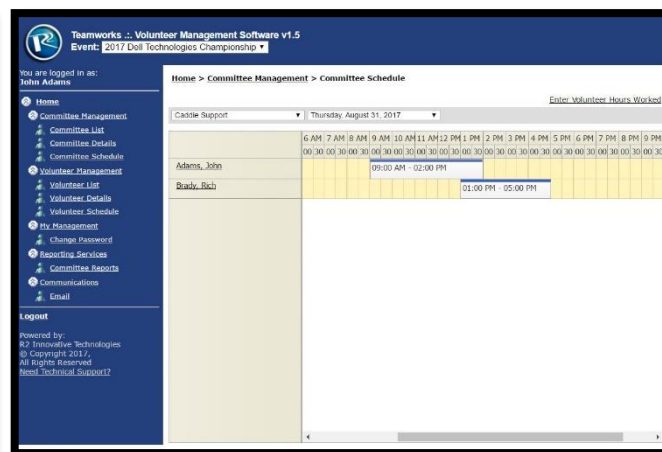
# COMMITTEE SCHEDULE PAGE

- 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.

The screenshot displays the Teamworks Volunteer Management Software v1.5 interface. The top navigation bar shows the user is logged in as John Adams. The main content area is titled "Home > Volunteer Management > Volunteer List". A dropdown menu on the left is set to "Caddie Support". Below the navigation bar, there are buttons for "Select All", "Send Email", and "Send Schedules". The volunteer count is shown as (1/10). The list of volunteers is sorted by Name and includes the following entries:

Volunteer Name	Event	Home	Work	Cell	Email	Location	Actions
Adams, John (C)	(02/06/2017)				gymsock10@aol.com		<a href="#">Details</a> <a href="#">Schedule</a>
Brady, Rich	(02/06/2017)			(508) 285-8333	carolynromano@pgatourhq.com		<a href="#">Details</a> <a href="#">Schedule</a>

The interface also includes a left-hand navigation menu with options like "Committee Management", "Volunteer Management", and "Logout". The footer contains copyright information for R2 Innovative Technologies, 2017.

# 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.

The screenshot displays the 'Volunteer Details' page in the Teamworks Volunteer Management Software v1.5. The interface is divided into a left sidebar and a main content area. The sidebar contains navigation links for Home, Committee Management, Volunteer Management, My Management, Reporting Services, and Communications. The main content area shows the user's name (John Adams), the event (2017 Dell Technologies Championship), and various fields for volunteer information, including Committee Preferences, Primary Address, Secondary Address, Experience, Notes, Disabilities, and Schedule With.

**Teamworks .. Volunteer Management Software v1.5**  
Event: 2017 Dell Technologies Championship

You are logged in as:  
**John Adams**

Home > Volunteer Management > Volunteer Details

Caddie Support | Adams, John

Send Email

**Committee Preferences:**  
I: Caddie Support

**Primary Address:**  
300 Arnold Palmer Blvd  
Norton, MA  
USA

**Secondary Address:**

**Experience:**  
No

**Notes:**  
2017: DECLINED Felony: No Heard about us: Website Referral: No Disability: No

**Disabilities:**

**Schedule With:**

Powered by:  
R2 Innovative Technologies  
© Copyright 2017,  
All Rights Reserved  
Need Technical Support?

# 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.

The screenshot displays the 'Volunteer Management' software interface. At the top, it shows the user is logged in as John Adams and is viewing the schedule for Brady Rich on 09/01/2017. The interface includes a navigation menu on the left with options like 'Committee Management', 'Volunteer Management', and 'My Management'. The main area shows a calendar grid with time slots from 4 AM to 2 PM. A 'Key' on the right explains the color coding: blue for 'Scheduled Time', yellow for 'Preferred Time', red for 'Scheduled Time On Another Committee', and orange for 'Preferred Time On Another Committee'. The schedule shows 'Caddie Support' activities on Friday, Saturday, and Sunday, with specific times and 'Right-click for options.' prompts.

Time	Fri 9/01	Sat 9/02	Sun 9/03	Mon 9/04
4 AM				
5 AM				
6 AM	Caddie Support AM Right-click for options.		Caddie Support ALL DAY Right-click for options.	Caddie Support AM Right-click for options.
7 AM				
8 AM				
9 AM				
10 AM				
11 AM				
12 PM		Caddie Support PM Right-click for options.		
1 PM				
2 PM				

# 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

Teamworks :: Volunteer Management Software v1.5  
Event: 2017 Dell Technologies Championship

You are logged in as:  
John Adams

Home > Volunteer Management > Volunteer Schedule

Caddie Support | Brady, Rich | 09/01/2017 | Print Schedule

	Fri 9/01	Sat 9/02	Sun 9/03	Mon 9/04
4 AM				
5 AM				
6 AM	Caddie Support AM Right-click for options.		Caddie Support ALL DAY Right-click for options.	Caddie Support AM Right-click for options.
7 AM				
8 AM				
9 AM				
10 AM				
11 AM				
12 PM		Caddie Support PM Right-click for options.		
1 PM				
2 PM				

**Key**

- Scheduled Time
- Preferred Time
- Scheduled Time On Another Committee
- Preferred Time On Another Committee

Powered by:  
R2 Innovative Technologies  
© Copyright 2017,  
All Rights Reserved  
Need Technical Support?



# 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.

The screenshot displays the 'Volunteer Schedule' interface for 'Caddie Support' on '09/01/2017'. The interface includes a navigation menu on the left, a main content area with a calendar grid, and a key on the right.

**Navigation Menu:**

- Home
- Committee Management
  - Committee List
  - Committee Details
  - Committee Schedule
- Volunteer Management
  - Volunteer List
  - Volunteer Details
  - Volunteer Schedule
- My Management
  - Change Password
- Reporting Services
  - Committee Reports
- Communications
  - Email
- Logout

**Main Content Area:**

Home > Volunteer Management > Volunteer Schedule

Caddie Support | Brady, Rich | 09/01/2017 | Print Schedule

	Fri 9/01	Sat 9/02	Sun 9/03	Mon 9/04
4 AM				
5 AM				
6 AM	Caddie Support AM		Caddie Support ALL DAY	Caddie Support AM
7 AM	Right-click for options.		Right-click for options.	Right-click for options.
8 AM				
9 AM				
10 AM				
11 AM				
12 PM		Caddie Support PM		
1 PM		Right-click for options.		
2 PM				

**Key:**

- Scheduled Time (Blue)
- Preferred Time (Yellow)
- Scheduled Time On Another Committee (Red)
- Preferred Time On Another Committee (Orange)

**Footer:**

Powered by:  
R2 Innovative Technologies  
© Copyright 2017,  
All Rights Reserved  
Need Technical Support?

# 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.

The screenshot displays the 'Volunteer Management' software interface. The main area shows a calendar view for the week of September 1-4, 2017. The volunteer 'Brady, Rich' is selected. The schedule for Friday, 9/1/2017, shows a 'Caddie Support' shift from 06:00 AM to 12:00 PM. A red box highlights the 8:00 AM - 12:00 PM slot, and a blue box highlights the 06:00 AM - 12:00 PM slot. A red arrow points to the 8:00 AM slot. The interface includes a navigation menu on the left, a key on the right, and a 'Print Schedule' button.

Time	Fri 9/1	Sat 9/2	Sun 9/3	Mon 9/4
5 AM				
6 AM	Caddie Support		Caddie Support	Caddie Support
7 AM	AM		ALL DAY	AM
8 AM	Right-click for options.		Right-click for options.	Right-click for options.
9 AM			Caddie Support	
10 AM			09:00 AM - 01:30 PM	
11 AM				
12 PM		Caddie Support		
1 PM		PM		
2 PM		Right-click for options.		
3 PM				
4 PM				

# 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.

The screenshot displays the 'Volunteer Management Software v1.5' interface. The main window shows a calendar for 'Brady, Rich' on '09/01/2017'. The calendar grid shows time slots from 5 AM to 4 PM. A blue box representing a scheduled time is visible for 'Caddie Support' from 6:00 AM to 12:00 PM. A red 'X' icon is overlaid on the top right corner of this blue box, with an arrow pointing to it and the text 'Delete scheduled time'. Another red box highlights a double-headed vertical arrow at the bottom of the blue box, with an arrow pointing to it and the text 'Drag schedule up or down to change time'. A key on the right side of the interface defines the colors: blue for 'Scheduled Time', yellow for 'Preferred Time', red for 'Scheduled Time On Another Committee', and orange for 'Preferred Time On Another Committee'. The left sidebar contains navigation options such as 'Home', 'Committee Management', 'Volunteer Management', and 'My Management'. The top of the interface shows the user is logged in as 'John Adams' and the event is '[2017 Dell Technologies Championship]'.

# VOLUNTEER SCHEDULE: SCHEDULE CHANGES

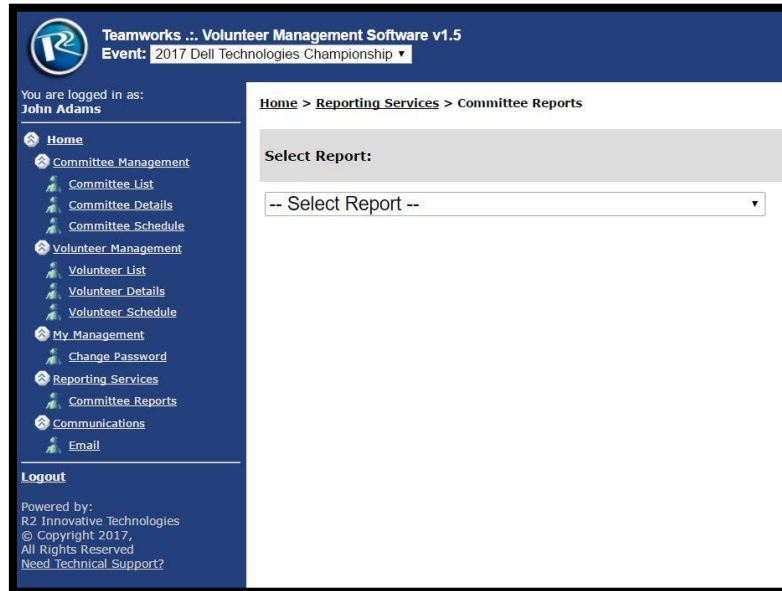
- Each committee will have a unique daily schedule and shift times, reflected in your Teamworks schedule.
- Teamworks reports are set-up in the shifts chosen by the Committee Chair for each committee
- If a volunteer elects to cancel/change shifts, coverage should be extended to the existing committee 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.

The screenshot displays the 'Volunteer Schedule' interface for the '2017 Dell Technologies Championship' event. The user is logged in as John Adams. The schedule is for 'Caddie Support' on Friday, 9/01/2017, for Brady, Rich. The schedule grid shows shifts from 5 AM to 4 PM. A key on the right indicates the status of shifts: Scheduled Time (blue), Preferred Time (yellow), Scheduled Time On Another Committee (red), and Preferred Time On Another Committee (orange). Red boxes highlight shifts on Friday, 9/01/2017, and Monday, 9/04/2017. Red arrows point to these shifts with handwritten notes: 'shift runs from morning to afternoon' and 'Full day'.

Time	Fri 9/01	Sat 9/02	Sun 9/03	Mon 9/04
5 AM				
6 AM	Caddie Support		Caddie Support	Caddie Support
7 AM	AM		ALL DAY	AM
8 AM	Right-click for options.		Right-click for options.	Right-click for options.
9 AM	Caddie Support			Caddie Support
10 AM	08:30 AM - 02:00 PM			06:00 AM - 12:00 PM
11 AM				
12 PM		Caddie Support		
1 PM		PM		
2 PM		Right-click for options.		
3 PM				
4 PM				

# 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.




The screenshot displays the Teamworks Volunteer Management Software v1.5 interface. The top navigation bar includes the R2 logo, the text "Teamworks .: Volunteer Management Software v1.5", and a dropdown menu for the event "2017 Dell Technologies Championship". Below the navigation bar, the user is logged in as "John Adams". A left sidebar menu lists various options: Home, Committee Management (with sub-items: Committee List, Committee Details, Committee Schedule), Volunteer Management (with sub-items: Volunteer List, Volunteer Details, Volunteer Schedule), My Management (with sub-items: Change Password), Reporting Services (with sub-item: Committee Reports), Communications, and Email. The main content area shows a breadcrumb trail: "Home > Reporting Services > Committee Reports". Below this, there is a "Select Report:" section with a dropdown menu currently displaying "-- Select Report --". At the bottom left, there is a "Logout" link and footer text: "Powered by: R2 Innovative Technologies © Copyright 2017, All Rights Reserved. Need Technical Support?"

# 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

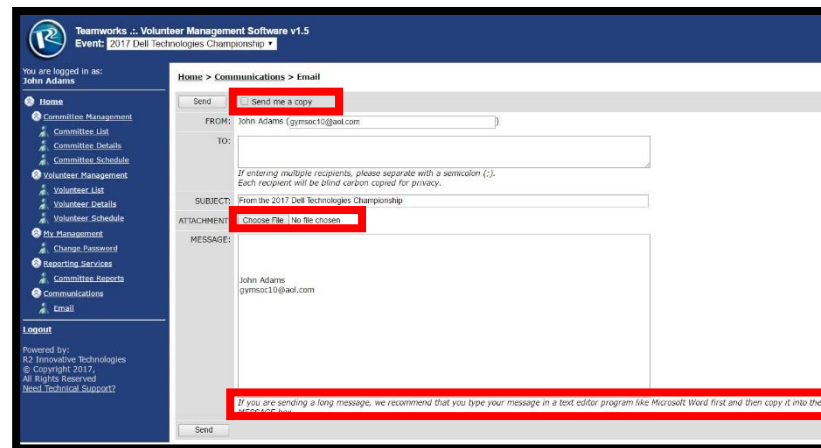
8. **Daily Schedule\***: Schedule of all volunteers for the designated committee, by day (pdf).
9. **Preferences\***: Report of all volunteers for designated committee and their shift availability to work during tournament week (pdf).
10. **Schedule\***: Report of all volunteers for the designated committee 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.

**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.

# 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 outgoing 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 9<sup>th</sup>.

Teamworks -. Volunteer Management Software v1.5  
Event: 2017 Dell Technologies Championship

You are logged in as:  
John Adams

Home > Committee Management > Committee Schedule

Caddie Support | Saturday, August 26, 2017

Enter Volunteer Hours Worked

	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM
	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30

Adams, John | Volunteer Hours - Google Chrome

Brady, Rich | Secure | https://teamworks.r2it.com/Web/\_Committees/VolunteerHours.aspx

**Caddie Support**

Enter the number of hours worked by the volunteers in this committee.

Save

	Hours Scheduled	Hours Checked-in	Hours Worked
Adams, John	13		0.00
Brady, Rich	30.5		0.00

Save

Powered by:  
R2 Innovative Technologies  
© Copyright 2017,  
All Rights Reserved  
Need Technical Support?

## **QUESTIONS?**

Contact Grace Marquis, R2IT Support

[gmarquis@r2it.com](mailto:gmarquis@r2it.com)

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