

# TEAMWORKS TRAINING 101



# WELCOME TO TEAMWORKS

- **What is Teamworks?** An on-line volunteer communication and scheduling platform.
- **Who has access to Teamworks?** All volunteers.
- **How will it help Division Directors and Committee Chairman?**
  - View a roster of all the volunteer's designated to your division or committee.
  - View a volunteer's application information, including contact information and scheduling preferences.
  - 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.

**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?](#)

**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  New User Registration 

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)

 Register

**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](http://teamworks.r2it.com) and use the **“Registered User Login”** tab.

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: 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**.

- Once you log-in, you will have a welcome page that features your profile.
- This page will be the same for Division Chairman and Committee Chairman.
- This page will look similar for general volunteers *(see page 39 for further detail)*.
- To view volunteer rosters and schedule volunteers, click the box in the top left corner ("**Click Here for Volunteer Scheduling**").

TeamWorks 2016 Dominion Charity Classic mbfleegs -

Balance: \$0.00

**MB Fleegle**

[Click Here For Volunteer Scheduling](#)

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

**My Contact Information**

Home:  
Work: (804) 234-8840  
Cell:  
Email: mbfleegle@gmail.com

[Request changes or corrections](#)

**Actions**

[Send Email](#)

# SCHEDULING HOMEPAGE



Teamworks :: Volunteer Management Software v1.5

Event: 2016 Dominion Charity Classic ▼

You are logged in as:  
MB Fleegle

- 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

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[Comments?](#) [Feedback?](#)

## Home

Welcome MB!

Please choose a menu option from the left.

## New Features

10-03-2012 :: Send Schedules Note

The Send Schedules feature in the Volunteer List page now allows you to add a note to the email that is sent out to the volunteers.

5-10-2012 :: New Reports

Three new reports have been added to "Committee Reports":

- Weekly Work Preferences
- Weekly Work Schedule
- Weekly Work Schedule (Notes)

2-24-2012 :: Improved Support

Scheduling improvements have been made for Google Chrome and Safari web browsers.

1-04-2011 :: New Reports

Two new reports have been added to "Committee Reports":

- Assignments (All - By Name)
- Assignments (All - By Committee)

8-07-2009 :: New Feature

# THREE (3) 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 and individual volunteer schedules.

Teamworks ... Volunteer Management Software v1.5  
Event: 2016 Dominion Charity Classic

You are logged in as:  
MB Fleege

**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**

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Comments? Feedback?

**Home**

Welcome MB!

Please choose a menu option from the left.

**New Features**

10-03-2012 ... Send Schedules Note

The Send Schedules feature in the Volunteer List page now allows you to add a note to the email that is sent out to the volunteers.

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Scheduling improvements have been made for Google Chrome and Safari web browsers.

1-04-2011 ... New Reports

Two new reports have been added to "Committee Reports":

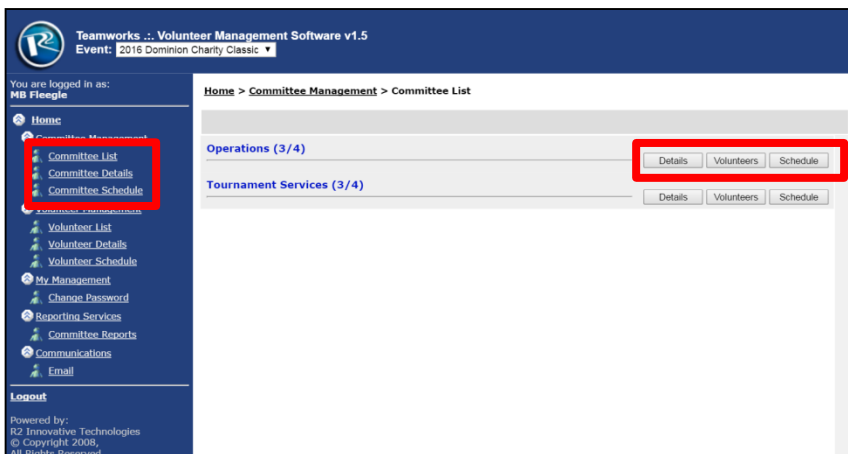
- Assignments (All - By Name)
- Assignments (All - By Committee)

8-07-2009 ... New Feature

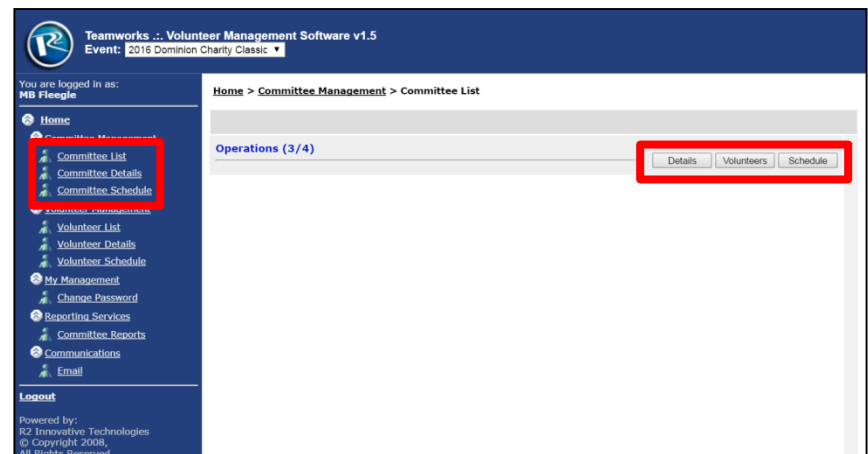


# COMMITTEE MANAGEMENT

- 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.



**Division Director View:**  
Multiple Committees



**Committee Chairman View:**  
One Committee

Volunteer Management Software v1.5

PGA TOUR Charity Classic ▼

[Home](#) > [Committee Management](#) > Committee Details

Tournament Services ▼

## Tournament Services

Description:

Capacity: **4**

Status: **True**

Chairmen: **MB Fleegle;**

Volunteers

Schedule

# VOLUNTEERS PAGE

- When you click on **"Volunteers"** on the Committee Management page, it will direct direct to the **"Volunteer List"** page *(see page 14 for more detail on this page).*

Volunteer Management Software v1.5  
In Charity Classic ▾

[Home](#) > [Volunteer Management](#) > Volunteer List

Tournament Services ▾ -- Committee Volunteers -- ▾

☐ Select All

Volunteer Count: (3/4)

Sort By: Name ▾

<input type="checkbox"/>	<b>Fleegle, MB (C)</b> (04/19/2016)				Location:
Home:	Work:	Cell:	Email:	<a href="#">Details</a> <a href="#">Schedule</a>	
			mbfleegle@gmail.com		
<input type="checkbox"/>	<b>Fitch, Jeff</b> (04/14/2016)				Location:
Home:	Work:	Cell:	Email:	<a href="#">Details</a> <a href="#">Schedule</a>	
(804) 234-8840			jefffitch@pgatourhq.com		
<input type="checkbox"/>	<b>H, Charlie</b> (04/14/2016)				Location:
Home:	Work:	Cell:	Email:	<a href="#">Details</a> <a href="#">Schedule</a>	
(804) 234-8840			charlieh@pgatourhq.com		
<input type="checkbox"/>	<b>M, Monica</b> (04/15/2016)				Location:
Home:	Work:	Cell:	Email:	<a href="#">Details</a> <a href="#">Schedule</a>	
(804) 234-8840			monicam@pgatourhq.com		

Designates  
Committee  
Chairman

# COMMITTEE SCHEDULE PAGE

- View the a daily schedule of all your volunteers.
- Choose a specific date in the drop-down on the top right.
- Division Directors can view each of their committees' schedules by choosing one from the drop-down on the top left .
- This page is a good resource and best viewed once volunteers have been scheduled.

Volunteer Management Software v1.5  
on Charity Classic

Home > Committee Management > Committee Schedule

Tournament Services Saturday, October 29, 2016

	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
Fitch, Jeff	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30
Fleegle, MB																
H, Charlie																
M, Monica																

Before Scheduling

Volunteer Management Software v1.5  
on Charity Classic

Home > Committee Management > Committee Schedule

Tournament Services Saturday, November 05, 2016

	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
Fitch, Jeff (PM)													5579 (11/5/2016 12:00 PM - 11/5/2016 6:00 PM)			
Fleegle, MB													5579 (11/5/2016 6:00 AM - 11/5/2016 6:00 PM)			
H, Charlie (ALL)													5579 (11/5/2016 6:00 AM - 11/5/2016 12:00 PM)			
M, Monica (PM)													5579 (11/5/2016 6:00 AM - 11/5/2016 6:00 PM)			

After Scheduling

# VOLUNTEER MANAGEMENT

- Click on **“Volunteer Management”** or **“Volunteer List”** to see view and manage your committee’s volunteers *(both links will direct to the same page)*.
- Committee Chairman: Choose your committee from the drop-down on the top left.
- Division Directors: You have the option to view a select committee in their division or all committees’ at once.

The screenshot displays the Teamworks Volunteer Management Software v1.5 interface. The top header bar is dark blue and contains the Teamworks logo, the text "Teamworks ... Volunteer Management Software v1.5", and the event name "Event: 2016 Dominion Charity Classic". Below the header, the left sidebar is dark blue and lists navigation options: Home, Committee Management, Volunteer Management (highlighted with a red box), My Management, Reporting Services, and Communications. Under Volunteer Management, the sub-links are Committee List, Committee Details, Committee Schedule, Volunteer List (highlighted with a red box), Volunteer Details, and Volunteer Schedule. The main content area is white and shows the breadcrumb "Home > Volunteer Management > Volunteer List". At the top of this area is a dropdown menu labeled "-- Choose Committee --" (highlighted with a red box). Below the dropdown are three buttons: "Select All", "Send Email", and "Send Schedules".

# VOLUNTEER LIST

- 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.

Teamworks ... Volunteer Management Software v1.5  
Event: 2016 Dominion Charity Classic

You are logged in as:  
MB Fleegle

Home > Volunteer Management > Volunteer List

Tournament Services -- Committee Volunteers --

☐ Select All

Volunteer Count: (3/4)

Sort By: Name

<input type="checkbox"/> Fleegle, MB (C) (04/19/2016)	Location:	<a href="#">Details</a> <a href="#">Schedule</a>
Home: Work: Cell: Email: mbfleegle@gmail.com		
<input type="checkbox"/> Fitch, Jeff (04/14/2016)	Location:	<a href="#">Details</a> <a href="#">Schedule</a>
Home: (804) 234-8840 Work: Cell: Email: jefffitch@pgatourhq.com		
<input type="checkbox"/> H, Charlie (04/14/2016)	Location:	<a href="#">Details</a> <a href="#">Schedule</a>
Home: (804) 234-8840 Work: Cell: Email: charlieh@pgatourhq.com		
<input type="checkbox"/> M, Monica (04/15/2016)	Location:	<a href="#">Details</a> <a href="#">Schedule</a>
Home: (804) 234-8840 Work: Cell: Email: monicam@pgatourhq.com		

Navigation Bar (Left):

- 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

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# VOLUNTEER LIST

- From this page, you can also send an email or schedule to all or select volunteers.
- **Send Email:** An email can be sent to one or all volunteers in a designated committee.
- **Send Schedule:** A weekly schedule can be sent directly to one or all volunteers in a designated committee.

Home > Volunteer Management > Volunteer List

Tournament Services ▼ -- Committee Volunteers -- ▼

☐ Select All

Volunteer Count: (3/4)

Sort By: Name ▼

<input type="checkbox"/>	<b>Fleegle, MB (C) (04/19/2016)</b>	<b>Location:</b>		
<b>Home:</b>	<b>Work:</b>	<b>Cell:</b>	<b>Email:</b> mbfleegle@gmail.com	<a href="#">Details</a> <a href="#">Schedule</a>
<input type="checkbox"/>	<b>Fitch, Jeff (04/14/2016)</b>	<b>Location:</b>		
<b>Home:</b> (804) 234-8840	<b>Work:</b>	<b>Cell:</b>	<b>Email:</b> jefffitch@pgatourhq.com	<a href="#">Details</a> <a href="#">Schedule</a>
<input type="checkbox"/>	<b>H, Charlie (04/14/2016)</b>	<b>Location:</b>		
<b>Home:</b> (804) 234-8840	<b>Work:</b>	<b>Cell:</b>	<b>Email:</b> charlieh@pgatourhq.com	<a href="#">Details</a> <a href="#">Schedule</a>
<input type="checkbox"/>	<b>M, Monica (04/15/2016)</b>	<b>Location:</b>		

**Note:** Turn off pop-up blockers for [www.teamworks.r2it.com](http://www.teamworks.r2it.com).

# SEND EMAIL

- Once a volunteer(s) have been selected and you click on **"Send Email"**, a screen will pop-up to edit the contents of the email.
- All fields are editable.
- After all fields have been updated, click **"Send"**.
- Note:** When volunteers receive the email it will come from a "@r2it.com" email address (*this can not be edited*).

The screenshot shows an email composition form with the following fields and annotations:

- Send** button: Annotated with "Suggest sending a copy to yourself."
- Send me a copy** checkbox: Annotated with "Suggest sending a copy to yourself."
- FROM:** mbfleegle@gmail.com
- TO:** (Empty field)
- CC:** (Empty field)
- BCC:** mbfleegle@gmail.com; jeffitch@pgatourhq.com; charlieh@pgatourhq.com; monicam@pgatourhq.com; (Annotated with "System defaults to enter all emails in 'BCC' line. They can be copied into 'TO' or 'CC', if desired.")
- SUBJECT:** From the 2016 Dominion Charity Classic (Annotated with "Carefully choose subject line – suggest including 'Dominion Charity Classic'")
- ATTACHMENT:** Choose File (Annotated with "Attachments will pull from your computer, not from Teamworks.")
- MESSAGE:** (Empty text area)
- Signature:** MB Fleegle  
mbfleegle@gmail.com (Annotated with "System defaults to registered name and email to create a signature.")

**Note:** Turn off pop-up blockers for [www.teamworks.r2it.com](http://www.teamworks.r2it.com).



# SEND SCHEDULE

- Once a volunteer(s) have been selected and you click on **"Send Schedule"**, a screen will pop-up to add a note to the email with the schedule attached.
- Click **"Send"** to send schedules to all selected volunteers.
- The subject line in the email will default to "2017 Charles Schwab Cup Championship: Volunteer Schedule" (*this can not be edited*).
- The schedule sent is an individual volunteer schedule report (*see page 25 for more detail*).
- Even if you "Select All" volunteers to send schedules, each volunteer will only receive their schedule not all volunteers on a designated committee.
- **Note:** When volunteers receive the email it will come from a "@r2it.com" email address (*this can not be edited*).

Home > Volunteer Management > Volunteer List

Tournament Services -- Committee Volunteers --

☐ Select All

Volunteer Count: (3/4)

Name	Home	Location
<input checked="" type="checkbox"/> Fleegle, MB		
<input checked="" type="checkbox"/> Fitch, Jeff	(804) 234-8840	
<input checked="" type="checkbox"/> H, Charlie	(804) 234-8840	
<input checked="" type="checkbox"/> M, Monica (04/15/2016)		

**Send Schedules**

Add a note (optional):

charlieh@pgatourhq.com

**Note:** Turn off pop-up blockers for [www.teamworks.r2it.com](http://www.teamworks.r2it.com).

# 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 can not be updated on Teamworks, only in the R2 Database.
- Please contact Kristi Lee Fowlks with any requested updates.

[Home](#) > [Volunteer Management](#) > Volunteer Details

Tournament Services ▼ Fitch, Jeff ▼

[Send Email](#)

**Committee Preferences:**

**Primary Address:**  
707 East Main Street  
Richmond, VA 23219

**Secondary Address:**

**Experience:**

**Notes:**

**Disabilities:**

**Schedule With:**

**Recruiter:**

**Starting Year:**  
2016

**Years Worked:**  
1

# VOLUNTEER SCHEDULE

- View a designated volunteer's weekly preferences and schedule that volunteer.
- 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.

Home > Volunteer Management > Volunteer Schedule

Tournament Services | Fitch, Jeff | 10/29/2016 | Print Schedule

2016	Sat 10/29	Sun 10/30	Mon 10/31	Tue 11/01	Wed 11/02	Thu 11/03	Fri 11/04	Sat 11/05	Sun 11/06	Mon 11/07	Key
6 AM						Tournament Services	Tournament Services		Tournament Services		Scheduled Time
7 AM						(6:00 AM - 6:00 PM) Right-click for options.	(6:00 AM - 12:00 PM) Right-click for options.		(6:00 AM - 6:00 PM) Right-click for options.		Preferred Time
8 AM											Scheduled Time On Another Committee
9 AM											Preferred Time On Another Committee
10 AM											
11 AM											
12 PM								Tournament Services			
1 PM								(12:00 PM - 6:00 PM) Right-click for options.			
2 PM											
3 PM											
4 PM											

# VOLUNTEER SCHEDULE: Preferences

- Schedule will appear for **10/23/17 – 11/13/17**
- Each volunteer's profile will highlight their availability (preferences) in a YELLOW box.
  - If a volunteer listed "ALL DAY" or both "AM" and "PM" on their application, they will show availability from 6 a.m. – 6 p.m.
  - If a volunteers listed "AM" on their application, they will show availability from 6 a.m. – 12 p.m.
  - If a volunteer listed "PM" on their application, they will show availability from 12 p.m. – 6 p.m.

Home > Volunteer Management > Volunteer Schedule

Tournament Services Fitch, Jeff 10/29/2016 Print Schedule

2016	Sat 10/29	Sun 10/30	Mon 10/31	Tue 11/01	Wed 11/02	Thu 11/03	Fri 11/04	Sat 11/05	Sun 11/06	Mon 11/07	Key
6 AM						Tournament Services (6:00 AM - 6:00 PM) Right-click for options.	Tournament Services (6:00 AM - 12:00 PM) Right-click for options.		Tournament Services (6:00 AM - 6:00 PM) Right-click for options.		Scheduled Time
7 AM											Preferred Time
8 AM											Scheduled Time On Another Committee
9 AM											Preferred Time On Another Committee
10 AM											
11 AM											
12 PM								Tournament Services (12:00 PM - 6:00 PM) Right-click for options.			
1 PM											
2 PM											
3 PM											
4 PM											

# VOLUNTEER SCHEDULE: Preferences

- All volunteers provided their scheduling preferences as part of the Volunteer Application process.
- Use these preferences as a guide to develop an initial schedule for your committee.
- A volunteer's preference can not be updated on Teamworks, only in the R2 Database.
- Please contact Kristi Lee Fowlks with any requested updates to a volunteer's preferences.

Home > Volunteer Management > Volunteer Schedule

Tournament Services Fitch, Jeff 10/29/2016 Print Schedule

2016	Sat 10/29	Sun 10/30	Mon 10/31	Tue 11/01	Wed 11/02	Thu 11/03	Fri 11/04	Sat 11/05	Sun 11/06	Mon 11/07
6 AM						Tournament Services (6:00 AM - 6:00 PM) Right-click for options.	Tournament Services (6:00 AM - 12:00 PM) Right-click for options.		Tournament Services (6:00 AM - 6:00 PM) Right-click for options.	
7 AM										
8 AM										
9 AM										
10 AM										
11 AM										
12 PM										
1 PM								Tournament Services (12:00 PM - 6:00 PM) Right-click for options.		
2 PM										
3 PM										
4 PM										

Key

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

# VOLUNTEER SCHEDULE: Scheduling

- To schedule a volunteer, click on the desired start time in spreadsheet and drag the mouse down to the desired end time.
  - Ex:** If you want to volunteer from 6am – 12pm on Thursday, 11/03 click on the line that starts at 6am and drag to the line directly above 12pm 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.

Home > Volunteer Management > Volunteer Schedule

Tournament Services Fitch, Jeff 10/29/2016 Print Schedule

2016	Sat 10/29	Sun 10/30	Mon 10/31	Tue 11/01	Wed 11/02	Thu 11/03	Fri 11/04	Sat 11/05	Sun 11/06	Mon 11/07	Key
6 AM						Tournament Services (6:00 AM - 6:00 PM)	Tournament Services (6:00 AM - 12:00 PM)		Tournament Services (6:00 AM - 6:00 PM)		Scheduled Time
7 AM											Preferred Time
8 AM											Scheduled Time On Another Committee
9 AM											Preferred Time On Another Committee
10 AM											
11 AM											
12 PM								Tournament Services (12:00			

Click and drag to schedule volunteers

Right-click for options.

Volunteer scheduled

Right-click for options.

- 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.

**W**ed  
11/02

**T**hu  
11/03

**F**ri  
11/04

**S**at  
11/05

**S**un  
11/06

**M**on  
11/07

**Key**

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

**Delete scheduled time**

**Drag schedule up or down to change time**

Tournament Services  
(6:00 AM - 12:00 PM)  
Right-click for options.

Tournament Services  
(6:00 AM - 12:00 PM)  
Right-click for options.

Tournament Services  
(6:00 AM - 6:00 PM)  
Right-click for options.

Tournament Services  
(12:00 PM - 6:00 PM)

# VOLUNTEER SCHEDULE: Scheduling

- Each committee will have a unique daily schedule and shift times.
- Teamworks reports are set-up in shifts of "AM" and "PM"
  - AM Shift: 12 a.m. – 11:59 a.m.
  - PM Shift: 12 p.m. – 11:59 p.m.
- It is suggested that if you are scheduling a volunteer for time in the morning and afternoon to create two schedule boxes, one until 11:59 a.m. and one that begins at 12 p.m.
  - Ex.: Shift time runs from the morning to the afternoon (8 a.m. – 2 p.m.)
  - Ex.: Volunteer is scheduled for a full day (6 a.m. – 6 p.m.)

Shift runs from morning to afternoon

Wed 11/02	Thu 11/03	Fri 11/04	Sat 11/05	Sun 11/06	Mon 11/07	Key
	Tournament Services (6:00 AM - 12:00 PM) Right-click for options.	Tournament Services (6:00 AM - 12:00 PM) Right-click for options.		Tournament Services (6:00 AM - 12:00 PM) Right-click for options.		Scheduled Time
	Tournament Services (12:00 PM - 6:00 PM)		Tournament Services (12:00 PM - 6:00 PM) Right-click for options.	Tournament Services (12:00 PM - 6:00 PM)		Preferred Time
						Scheduled Time On Another Committee
						Preferred Time On Another Committee

Full day



# VOLUNTEER SCHEDULE: Print Schedule

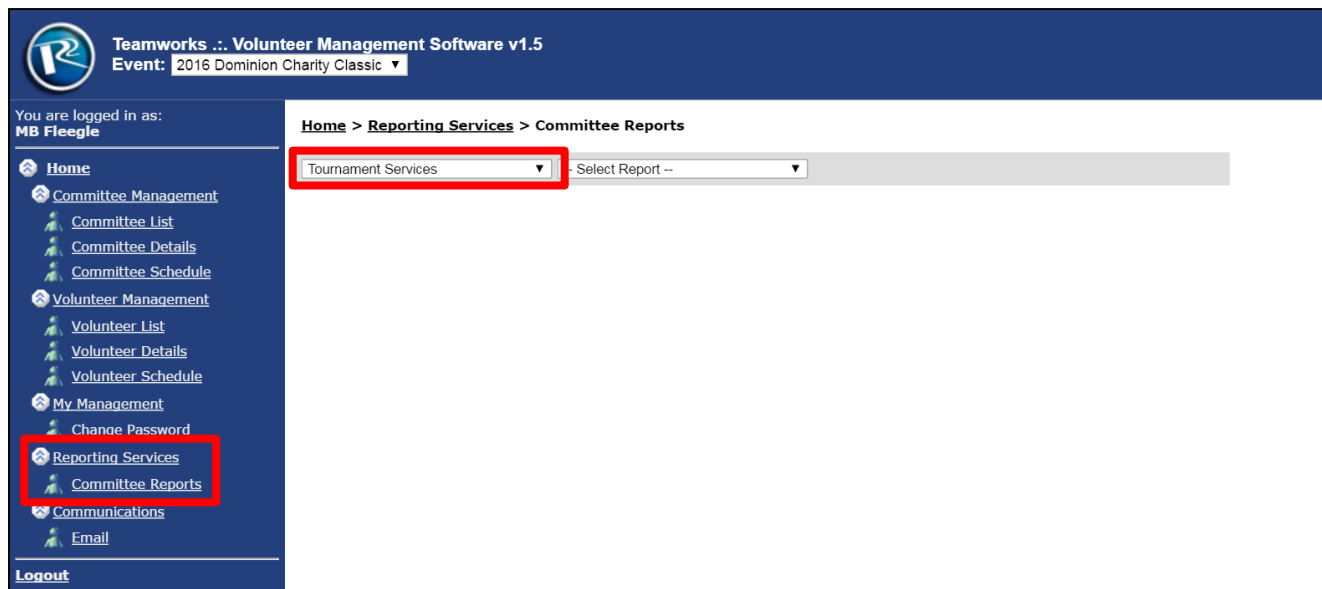
- An individual volunteer's schedule can be saved or printed from this page.
- Select a specific volunteer's schedule you'd like to view.
- Click on **"Print Schedule"** to view the current schedule for an individual volunteer.
- The schedule will pop-up in a separate webpage. From that page, you can save or print the schedule.
- This report will only show the days a specific volunteer has been scheduled to work.

Tournament Services		Fitch, Jeff		10/31/2016		Print Schedule	
2016	Mon 10/31	Tue 11/01	Wed 11/02	Thu 11/03	Fri 11/04	Sat 11/05	Sun 11/06
5 AM							
6 AM				Tourna Service (6:00 AM - 6:00 PM)	Tourna Service (6:00 AM - 12:00 PM)		Tourna Service (6:00 AM - 6:00 PM)
7 AM							
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							

Jeff Fitch Schedule.pdf	1 / 1	Print
2016 Dominion Charity Classic		
Volunteer Schedule		
Fitch, Jeff		
Location:		
Date:	6AM	7AM
Thursday, November 3, 2016		
Friday, November 4, 2016		
Saturday, November 5, 2016		
Sunday, November 6, 2016		

# REPORTING SERVICES

- Click on **"Reporting Services"** or **"Committee Reports"** to see view and manage your committee's volunteers *(both links will direct to the same page)*.
- Committee Chairman: Choose your committee from the drop-down on the top left.
- Division Directors: You have the option to view a select committee in their division or all committees' at once.



# REPORTING SERVICES

- Choose a report for the select committee in the drop-down on the top left.
- There are 14 reports that can be generated in Teamworks.

**Teamworks .. Volunteer Management Software v1.5**  
Event: 2016 Dominion Charity Classic ▼

You are logged in as:  
**MB Fleege**

**Home > Reporting Services > Committee Reports**

Tournament Services ▼


-- Select Report --

- Select Report --
- Assignments (All - By Name)
- Assignments (All - By Committee)
- Available To Work
- Check-In List
- Check-In List (All Volunteers)
- Committee Preferences
- Contact List
- Contact List (Notes)
- Schedule
- Schedule (Working Only)
- Volunteer Scheduling Notes
- Weekly Preferences
- Weekly Work Schedule
- Weekly Work Schedule (Notes)

# REPORT DESCRIPTION

1. **Assignments (All – By Name):** Alphabetical list of all volunteers and their committee assignment.
2. **Assignment (All – By Assignment):** All volunteers listed by committee assignment.
3. **Available To Work\*:** Availability of volunteers on a designated committee to work, by day.
4. **Check-in List\*:** Alphabetical check-in list of all volunteers for the designated committee.
5. **Check-in List (All):** Alphabetical check in list of all volunteers.
6. **Contact List\*:** Alphabetical contact list for the designated committee.
7. **Contact List (Notes):** Alphabetical contact list for the designated committee with experiences and notes included.


**\*Most commonly used reports by Division Directors and Committee Chairman.**

**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 DESCRIPTION

8. **Schedule\***: Schedule of all volunteers for the designated committee, by day.
9. **Schedule (Working Only)\***: Schedule of volunteers for the designated committee working on a specific day. Those volunteers not scheduled on a specific day will not appear on this report.
10. **Volunteer Scheduling Notes**: Alphabetical list of all volunteers including years experience, request for scheduling, with another volunteer, etc. All notes pulled from R2 database.
11. **Weekly Preferences\***: Report of all volunteers for the designated committee and their availability to work during tournament week.
12. **Weekly Work Schedule\***: Report of all volunteers for the designated committee and their schedule for tournament week.
13. **Weekly Work Schedule (Notes) \***: Report of all volunteers for the designated committee, their schedule for tournament week, request for scheduling with another volunteers and notes. All notes pulled from R2 database.

**\*Most commonly used reports by Division Directors and Committee Chairman.**

**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**.

# VIEW AND PRINT REPORTS

- All report pages will have the same page header.
- Choose the appropriate date in the drop-down on the top far right.
- View or print the report by clicking “Print to PDF” - this is a non-editable format.
- View or print the report by clicking “Export to Excel” - this is an editable format.
- Set the page view size by clicking the percentage drop-down on the top left.

**Teamworks .. Volunteer Management Software v1.5**  
Event: 2016 Dominion Charity Classic ▼

You are logged in as:  
**MB Fleegle**

**Home > Reporting Services > Committee Reports**

Tournament Services ▼ Check-In List ▼ 11/04/2016 ▼

Print to PDF Export to Excel

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# COMMONLY USED REPORTS

## AVAILABLE TO WORK

- Choose a specific day in the drop-down on the top right to view your volunteer's schedule. Committee Chairman will not appear on this list.
- Teamworks defaults to a daily schedule to 6 a.m. – 6 p.m. If your committee is required to have coverage in advance of or after those hours, make sure your volunteers are aware.
- When should I use this report?** Committee Chairman can use at the beginning of the scheduling process to evaluate the availability of their volunteers and determine if there are any gaps they need to fill.

Tournament Services Available To Work 11/04/2016

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2016 Dominion Charity Classic  
Committee Work Availability  
Tournament Services  
Friday, November 4, 2016

Volunteer Name	6AM	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM	8PM
Fitch, Jeff	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
H, Charlie	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
M, Monica	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
Total Coverage:	2	2	2	2	2	2	2	2	2	2	2	2	2	0	0

# COMMONLY USED REPORTS

## CHECK-IN LIST

- Choose a specific day in the drop-down on the top right to view volunteers scheduled to work for your committee.
- When should I use this report?** Committee Chairman can print for each day the committee is scheduled to work. There will be a main Volunteer check-in at Volunteer Village, but this can also be used to track volunteer arrival.

Tournament Services ▼ Check-In List ▼ 11/04/2016 ▼

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**2016 Dominion Charity Classic**

**Committee Check-In List**

*Tournament Services*

Friday, November 4, 2016

Name	Home Phone	Cell Phone	Time	Hours	Signature
Fitch, Jeff	(804) 234-8840			6.0	
Fleegle, MB				12.0	
H, Charlie	(804) 234-8840			6.0	
M, Monica	(804) 234-8840			12.0	



## CONTACT LIST

- A volunteer's contact information can not be updated on Teamworks, only in the R2 Database.
- To update contact information, please contact Kristi Lee Fowlks.
- **When should I use this report?** Committee Chairman can print to have a resource in advance of and during tournament week. It should be distributed to all volunteers on your committee in advance of the tournament. It can be used for a committee phone tree.

Tournament Services
Contact List

Print to PDF
Export to Excel

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2016 Dominion Charity Classic

Committee Contact List

Tournament Services

Name	YOS	Address	City	State	Zip	Home Phone	Cell Phone	Email
Fitch, Jeff	1	707 East Main Street	Richmond	VA	23219	(804) 234-8840		jefffitch@pgatourhq.com
Fleegle, MB	1							mbfleegle@gmail.com
H, Charlie	1	707 East Main Street	Richmond	VA	23219	(804) 234-8840		charlieh@pgatourhq.com
M, Monica	1	707 East Main Street	Richmond	VA	23219	(804) 234-8840		monicam@pgatourhq.com

## SCHEDULE

- Choose a specific day in the drop-down on the top right to view your volunteer's schedule.
- When should I use this report?** Committee Chairman can view coverage for a given day, by hour, as well as see what volunteers are not scheduled. It after volunteers have been scheduled to identify coverage and gaps that need to be filled.

[Home](#) > [Reporting Services](#) > Committee Reports

Tournament Services Schedule 11/04/2016

Print to PDF Export to Excel

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**2016 Dominion Charity Classic**

**Committee Scheduling Report**

*Tournament Services*

Friday, November 4, 2016

Volunteer Name	5AM	6AM	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM
Fitch, Jeff															
Fleegle, MB															
H, Charlie															
M, Monica															
Total Coverage:	0	0	3	3	3	3	3	3	3	3	3	3	3	3	0

## SCHEDULE (WORKING ONLY)

- Choose a specific day in the drop-down on the top right to view your volunteer's schedule.
- When should I use this report?** Committee Chairman can view coverage for a given day, by hour, of only volunteers that are scheduled. It is best used after volunteers have been scheduled to identify coverage by hour. It can be printed and on-hand to confirm volunteers working during the specific day of tournament week.

Home > Reporting Services > Committee Reports

Tournament Services Schedule 11/04/2016

Print to PDF Export to Excel

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2016 Dominion Charity Classic

Committee Scheduling Report

Tournament Services

Friday, November 4, 2016

Volunteer Name	5AM	6AM	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM
Fitch, Jeff		----	----	----	----	----	----								
Fleegle, MB		----	----	----	----	----	----								
H, Charlie															
M, Monica		----	----	----	----	----	----								
Total Coverage:	0	0	3	3	3	3	3	3	3	3	3	3	3	3	0

# COMMONLY USED REPORTS

## WEEKLY PREFERENCES

- Choose a start day in the drop-down on the top right to view your volunteer's schedule. This report will run on 7 day increments. For most committees, you will choose "11/07/2016".
- Preferences were provided on volunteer applications. To update a volunteer's preferences, please contact Kristi Lee Fowlks.
- Each day is divided into three sections: AM (morning availability), PM (afternoon availability) and E (all day availability).
- When should I use this report?** Committee Chairman can use to evaluate volunteer's availability and identify gaps in the schedule prior to beginning the scheduling process.

Tournament Services	Weekly Preferences	10/31/2016
Print to PDF	Export to Excel	
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2016 Dominion Charity Classic Weekly Preferences Report		Tournament Services 10/31/2016 - 11/6/2016
	Monday 10/31/16	Tuesday 11/01/16
	Wednesday 11/02/16	Thursday 11/03/16
	Friday 11/04/16	Saturday 11/05/16
	Sunday 11/06/16	
Committee Members	AM PM E	AM PM E
Flegle, MB (04/19/2016) mbflegle@gmail.com Schedule w/		
Notes:		
Fitch, Jeff (04/14/2016) 307 East Main Street Richmond, VA 23219 jeffitch@golftourhq.com (804) 234-8840 (H) Schedule w/	A P E	A P E
Notes:		
H, Charlie (04/14/2016) 307 East Main Street Richmond, VA 23219 charlieh@golftourhq.com (804) 234-8840 (H) Schedule w/	P	P A P E
Notes:		

# COMMONLY USED REPORTS

## WEEKLY WORK SCHEDULE

- Choose a start day in the drop-down on the top right to view your volunteer's schedule. This report will run on 7 day increments. For most committees, you will choose "11/07/2016".
- Each day is divided into two sections: AM (scheduled in the morning) and PM (scheduled in the afternoon).
- When should I use this report?** Committee Chairman should use after volunteers have been scheduled to review coverage for each day. It is best used after volunteers have been scheduled to identify coverage by day. It can be printed and on-hand to confirm volunteers working during the specific day of tournament week.

Home > Reporting Services > Committee Reports

Tournament Services Weekly Work Schedule 10/31/2016

Print to PDF Export to Excel

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2016 Dominion Charity Classic  
Weekly Work Schedule Report

Tournament Services  
10/31/2016 - 11/6/2016

	Monday 10/31/16		Tuesday 11/01/16		Wednesday 11/02/16		Thursday 11/03/16		Friday 11/04/16		Saturday 11/05/16		Sunday 11/06/16	
	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
<b>Committee Members</b>														
Fitch, Jeff							A		A		P		A	
Fiegle, MB							A		A		A		A	P
H, Charlie							A		P		A		A	
M, Monica									A		A			
Total Coverage by Shift (Not including Chairpersons)	0	0	0	0	0	0	3	0	3	1	3	1	3	1
	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
4 Committee Member(s)	10/31/16	10/31/16	11/01/16	11/01/16	11/02/16	11/02/16	11/03/16	11/03/16	11/04/16	11/04/16	11/05/16	11/05/16	11/06/16	11/06/16
	Monday	Monday	Tuesday	Tuesday	Wednesday	Wednesday	Thursday	Thursday	Friday	Friday	Saturday	Saturday	Sunday	Sunday

## WEEKLY WORK SCHEDULE (NOTES)

- Choose a start day in the drop-down on the top right to view your volunteer's schedule. This report will run on 7 day increments. For most committees, you will choose "11/07/2016".
- Each day is divided into two sections: AM (scheduled in the morning) and PM (scheduled in the afternoon).
- When should I use this report?** Committee Chairman should use after volunteers have been scheduled to review coverage for each day. It is best used after volunteers have been scheduled to identify coverage by day and if there are any volunteer preferences that should be noted.

Tournament Services

Weekly Work Schedule (Notes)

10/31/2016

Print to PDF

Export to Excel

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75%

2016 Dominion Charity Classic

Weekly Work Schedule Report

Tournament Services

10/31/2016 - 11/6/2016

	Monday 10/31/16		Tuesday 11/01/16		Wednesday 11/02/16		Thursday 11/03/16		Friday 11/04/16		Saturday 11/05/16		Sunday 11/06/16	
	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
<b>Committee Members</b>														
Fitch, Jeff (804) 234-8840 (H) jeff@pgatourhq.com Schedule w/: Notes:							A		A		P		A	
Fleegle, MB mbfleegle@gmail.com (04/19/2016) Schedule w/: Notes:							A		A		A		A	P

# VOLUNTEER'S PROFILE

- General volunteers will complete the same registration process.
- Once a volunteer has registered with Teamworks, they will have access to their profile page to view their contact information, uniform information and schedule.
- A separate training document will be developed and available to distribute to all general volunteers.

The screenshot shows a web interface for TeamWorks. The top blue header bar contains the TeamWorks logo, the event name "2016 Dominion Charity Classic", and a user profile icon labeled "mbfleegs". Below the header, the main content area has a balance of "\$0.00" in the top right. The user's name "MB Fleegle" is prominently displayed. A navigation bar includes links for Home, Preferences, Uniform, Payments, and Schedule. The "My Contact Information" section lists: Home: (blank), Work: (804) 234-8840, Cell: (blank), and Email: mbfleegle@gmail.com. A link "Request changes or corrections" is at the bottom of this section. An "Actions" box on the right contains a "Send Email" button.

TeamWorks 2016 Dominion Charity Classic mbfleegs

Balance: \$0.00

## MB Fleegle

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

**My Contact Information**

Home:  
Work: (804) 234-8840  
Cell:  
Email: mbfleegle@gmail.com

[Request changes or corrections](#)

**Actions**

[Send Email](#)

# REMINDERS

- **Volunteer Newsletter:** Will be sent to all volunteers on a monthly basis and include general volunteer and tournament information.
- **Meeting with Tournament Staff:** The Charles Schwab Cup Championship tournament staff is available to meet with Division Chairman and Committee Chairman or with individual Committee Chairman for an in-depth conversations about the tournament and your division or committee's responsibilities.
- **Division Meetings:** As the tournament approaches it is suggested that Division Directors have regular meetings or calls with the Committee Chairman.
- **Communication:** It is suggested that Committee Chairman continue to communicate to volunteers through the Summer and Fall.
- **Volunteer Website:** The website will be updated on a regular basis with information about the volunteer program and the tournament. We encourage all volunteers to use it as a resource leading up to the tournament.  
([www.volunteers.charlesschwabcupchampionship.com](http://www.volunteers.charlesschwabcupchampionship.com))



# Next Steps & Tournament Timeline

Task	Group	Deadline
Contact volunteers on designated committee	Committee Chairman	July 1
Sign-up for Teamworks account	Division Chairman Committee Chairman Marshal Hole Captains	July 15
Provide tournament week committee schedules to Division Directors and Committee Chairman	Teamworks Kristi Lee Fowlks	Ongoing
Set-up meetings or calls with each Committee Chairman to discuss schedule, shifts times and responsibilities	Kristi Lee Fowlks	Ongoing
Run and review "Available to Work" and/or "Weekly Preferences" report for designated committee	Committee Chairman	August 30
Identify gaps in committee schedule based on "Available to Work" and/or "Weekly Preferences" report	Committee Chairman	August 30
Reach out to volunteers with confirm schedule, shifts willing to work, and answer any specific questions	Committee Chairman	September 1 – September 30

# Next Steps & Tournament Timeline

Task	Group	Deadline
Provide draft of committee schedule to Division Chairman and Tournament Staff for review	Committee Chairman	October 1
Finalize a draft committee schedule and ask volunteers to register for Teamworks to view their draft schedule	Committee Chairman	October 15
Receive feedback from volunteers on their schedule	Committee Chairman	October 15 – October 30
Training Sessions	Tournament Staff Volunteers by Committee or Division	October 1 – October 30 (specific dates and location TBD)
Uniform Distribution	All volunteers	October 22 & 29 November 5 (specific dates and location TBD)
Finalize committee schedule	Division Directors Committee Chairman	October 28
Provide final committee schedule* to Tournament Staff	Division Directors Committee Chairman	October 28

\*Schedule is subject to last minute changes. All changes made after October 28 should be communicated to Tournament Staff.

# QUESTIONS?

Contact Kristi Lee Fowlks, Tournament Services Manager

[KristiLeeFowlks@pgatourhq.com](mailto:KristiLeeFowlks@pgatourhq.com)

Office: 480.237.2100 x 14

Cell: 503.320.4317