# TeamWorks QuickStart Users Guide

**Login at http://teamworks.r2it.com** (Figure 1)
(If you have not yet created an account, please see the QuickStart First-Time guide.

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

Teamworks .:. Volunte

You are logged in as:
**Rich Schoenfeld**

- **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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As a chairperson, you are responsible for scheduling the volunteers on your committee. TeamWorks gives you that ability. Upon logging in, you will see the navigation bar to the left (Figure 2). The items on the left should give you all the functionality you need to schedule your volunteers. You can view volunteer preferences, and their contact information, as well as relevant information including years worked, previous experience, disabilities and other useful information.

You can schedule your volunteers to specific days and times, and email those schedules directly to your volunteers. Once completed, you can export your schedules to excel or pdf.

Reports include schedules, contact lists, check-in lists, and preference lists. New reports will be added on a continuous basis.

Before we begin, at any time you have the opportunity to change your password. *Unfortunately, at this time, you will not be able to change your assigned username.* Simply click on the **Change Password** option on the navigation bar.

Now, let's get started…

**Creating schedules for your committee volunteers:**

Scheduling within TeamWorks can be accomplished in one of two ways. You can assign your volunteers on an individual level (Figure 3 3) or you may assign them via the committee level (Figure ).
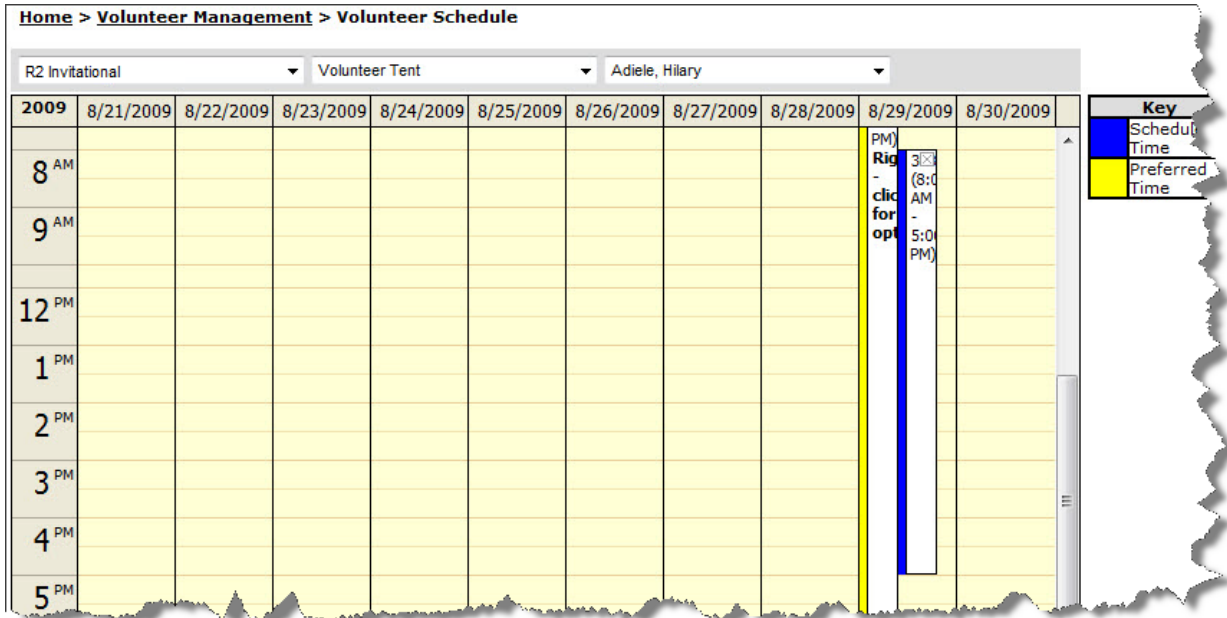
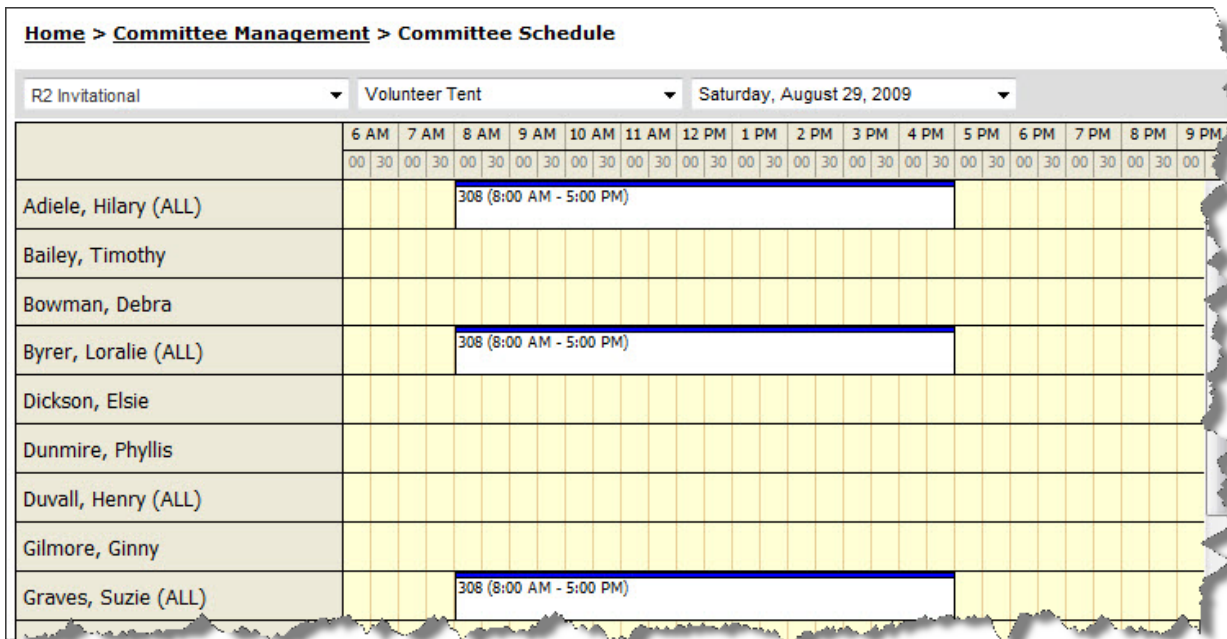| R2 Invitational | ▼ | Volunteer Tent | ▼ | Adiele, Hilary | ▼ |

**Figure 3**

| R2 Invitational | ▼ | Volunteer Tent | ▼ | Saturday, August 29, 2009 | ▼ |

| | 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 | 00 | 30 | 00 | 30 | 00 | 30 | 00 | 30 | 00 | 30 | 00 | 30 | 00 | 30 | 00 |
| Adiele, Hilary (ALL) | | | 308 (8:00 AM - 5:00 PM) | | | | | | | | | | | | | |
| Bailey, Timothy | | | | | | | | | | | | | | | | |
| Bowman, Debra | | | | | | | | | | | | | | | | |
| Byrer, Loralie (ALL) | | | 308 (8:00 AM - 5:00 PM) | | | | | | | | | | | | | |
| Dickson, Elsie | | | | | | | | | | | | | | | | |
| Dunmire, Phyllis | | | | | | | | | | | | | | | | |
| Duvall, Henry (ALL) | | | | | | | | | | | | | | | | |
| Gilmore, Ginny | | | | | | | | | | | | | | | | |
| Graves, Suzie (ALL) | | | 308 (8:00 AM - 5:00 PM) | | | | | | | | | | | | | |

**Figure 4**

Each view has its advantages.  With the volunteer schedule, you can schedule a volunteer for the entire week in a single view.  The committee schedule allows you to easily schedule all your volunteers for a single day. Whichever method you choose to schedule your volunteers, the data is stored in the same place.  You can enter information in either view at any time.

**Scheduling via the Volunteer Schedule View**

To view the Volunteer Schedule, you will need to click the Schedule button to the right of the desired volunteer (Figure ).  The volunteer will be listed as part of the Volunteer List.  Click on **Volunteer List** in the navigation bar, or by selecting Volunteers in the Committee List view.
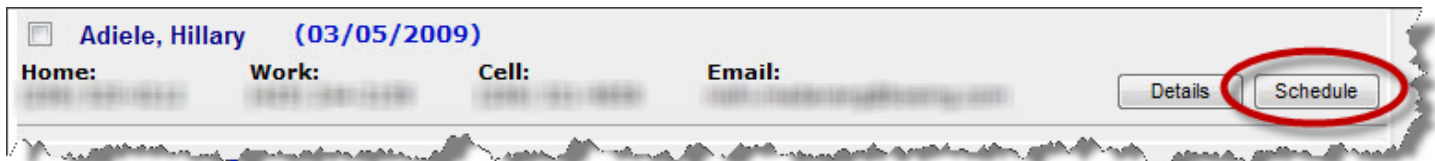
Figure 5

Once selected, you will have access to the weekly schedule of the desired volunteer (Figure ).
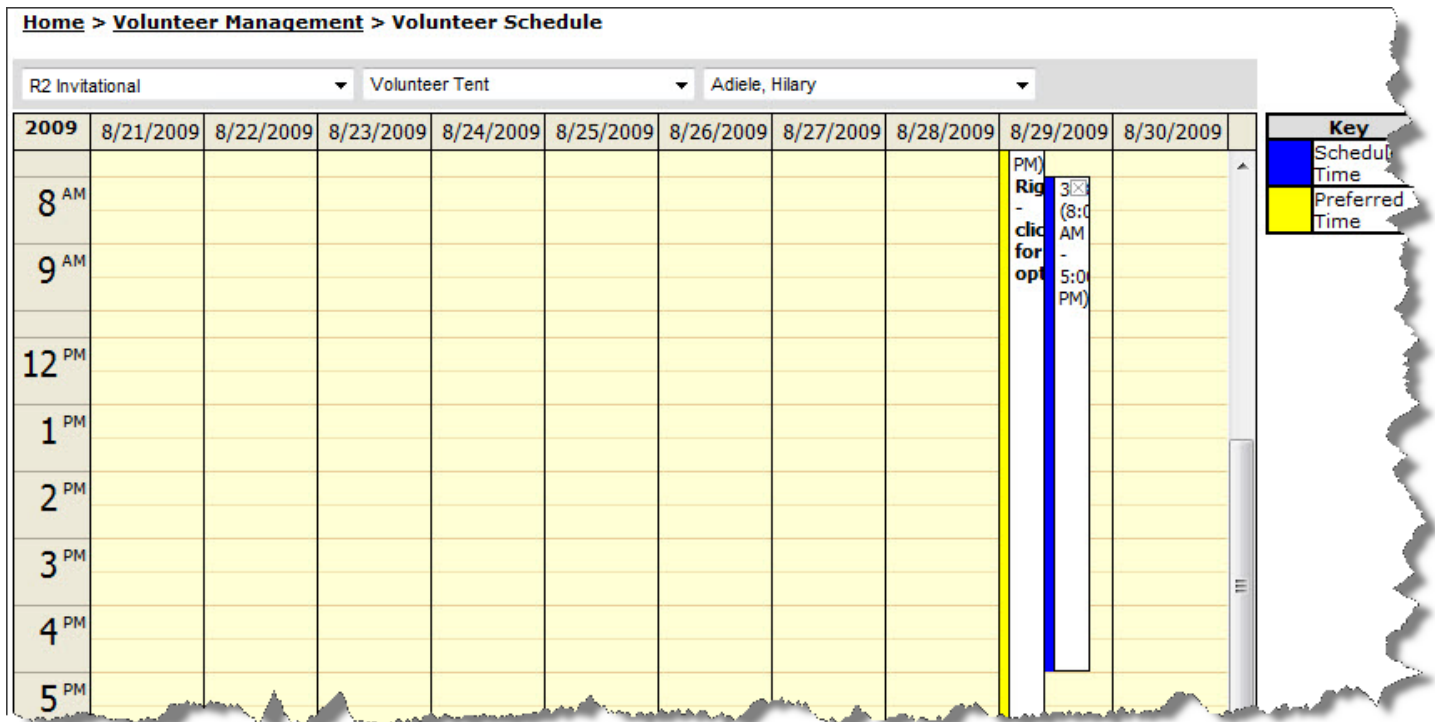


Figure 6

Make sure you understand the difference between Preferred Time and Scheduled Time.

**Preferred Time** – Time the volunteer has requested to work *(indicated in yellow)*
**Scheduled (Assigned) Time** – Time the volunteer has been assigned to work *(indicated in blue)*

As a chairperson, you cannot edit a volunteers preferred times.  You may only edit scheduled times, especially since you are in charge of scheduling.   Normally, you would schedule volunteers around their preferred times. To schedule a volunteer for a particular time, drag your mouse along the times you want to schedule.  Release the mouse to create the scheduled time.  To edit your selection, you can click and drag to reduce or enlarge the scheduled time.  You can delete the scheduled time by clicking the upper right-hand corner of the scheduled time.  You will notice an X in that area. TIP:  To create a scheduled time that matches the preferred time, right-click the preferred time, and click Schedule.  This will create a scheduled time at the preferred time.

**Scheduling via the Committee Schedule View**

To view the Committee Schedule, you will need to click the Schedule button to the right of the desired committee within the Committee List View (Figure ).
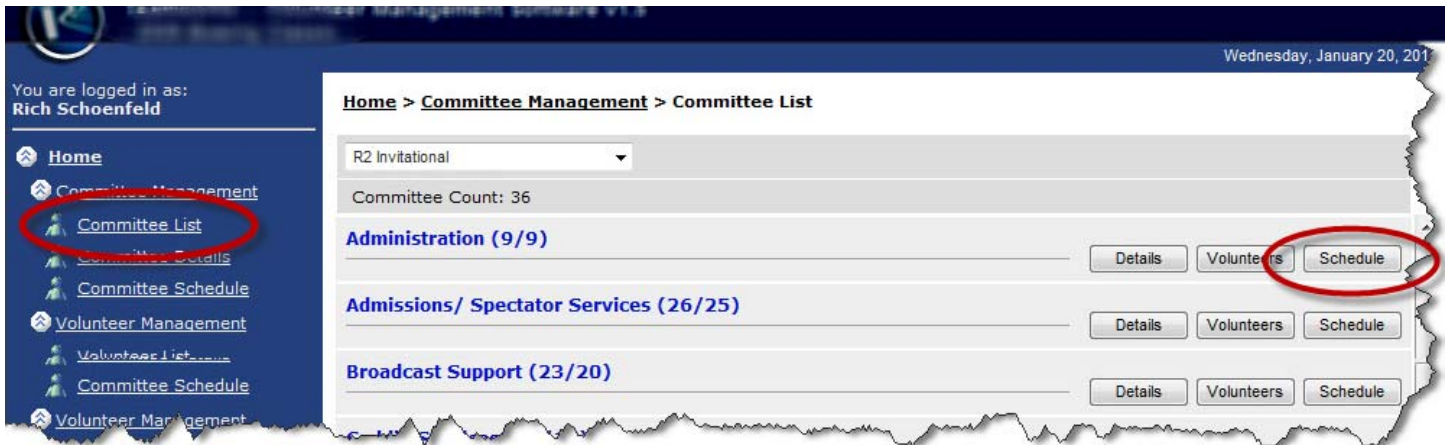
Once selected, you will have access to the daily schedule of the desired committee (Figure ).
To switch days, select the appropriate day in the drop-down.

Within this view, you will notice that a volunteers preferred time is listed in parenthesis to the right of their name. You will typically see AM, PM, Either or ALL (meaning ALL DAY). The blue high-lighted area indicates the scheduled time for that respective volunteer on that day. To create a scheduled time, click and drag your cursor over the prospected time range. Release the mouse to create the time. You can click the edges to modify the time frame. TIP: *We do not recommend clicking each individual 30 minute time-frame to create a shift.* To delete a scheduled time, right-click the scheduled time and select the Delete option.

## Reporting

Now that you have entered all your scheduling information, you can print, export, or email information as needed.

Click on **Committee Reports** under **Reporting Services** on the navigation bar to bring up the reports area (Figure ).
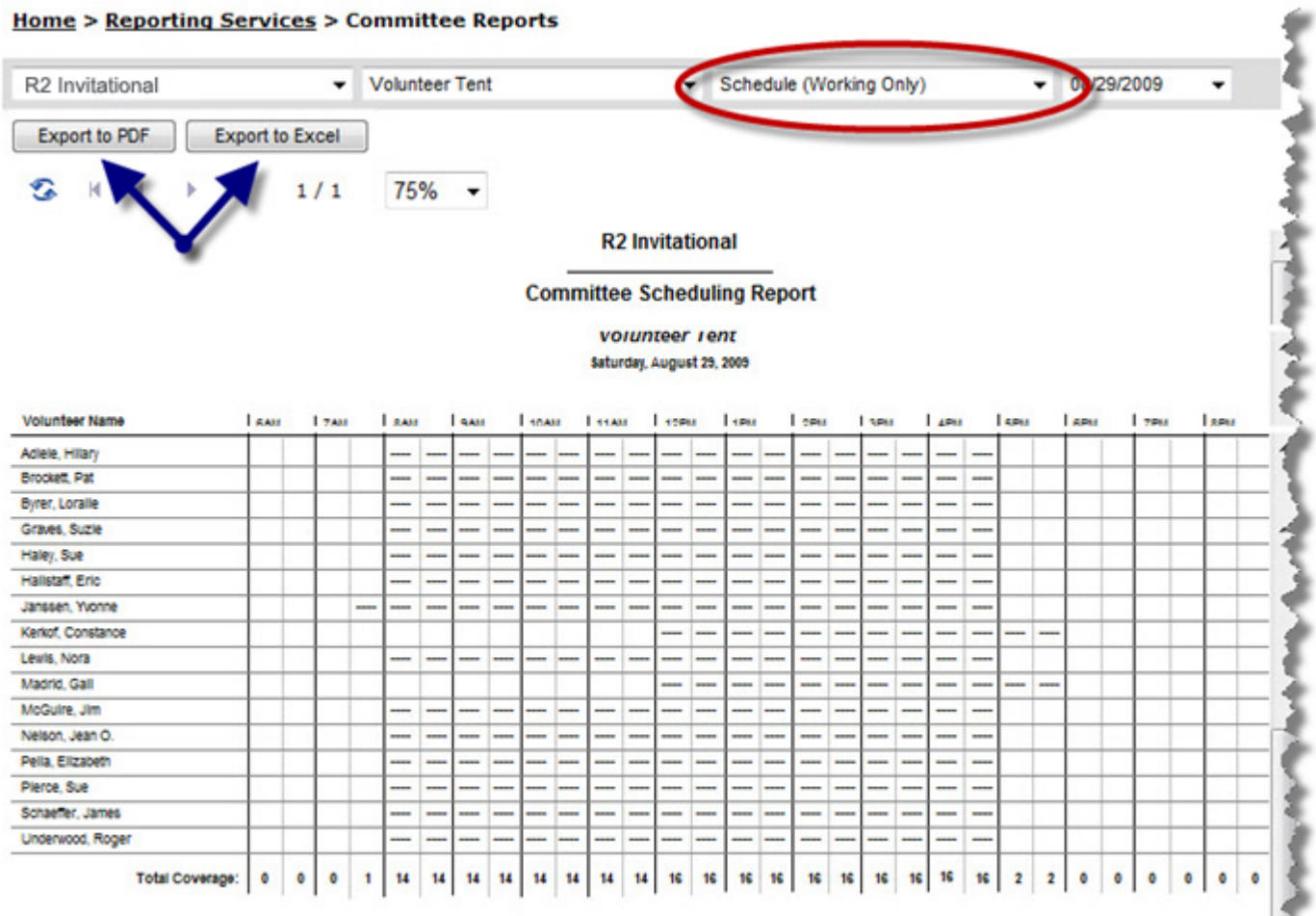


**Home > Reporting Services > Committee Reports**

| R2 Invitational ▼ | Volunteer Tent ▼ | -- Select Report -- ▼ |

Figure 9

Using the drop-down, select the report you would like to review.

In this example (Figure ), we have chosen the Schedule (Working Only) report for a particular day.  This report only shows the people that are working that day, including coverage totals at the bottom.  Notice the two export options available.  You can save this report and others, and then send them as needed.

Please experiment with the other reports as well to determine their usefulness for your purposes.



**Home > Reporting Services > Committee Reports**

| R2 Invitational ▼ | Volunteer Tent ▼ | Schedule (Working Only) ▼ | 08/29/2009 ▼ |

Export to PDF    Export to Excel

1 / 1    75% ▼

### R2 Invitational
### Committee Scheduling Report
*Volunteer Tent*
Saturday, August 29, 2009

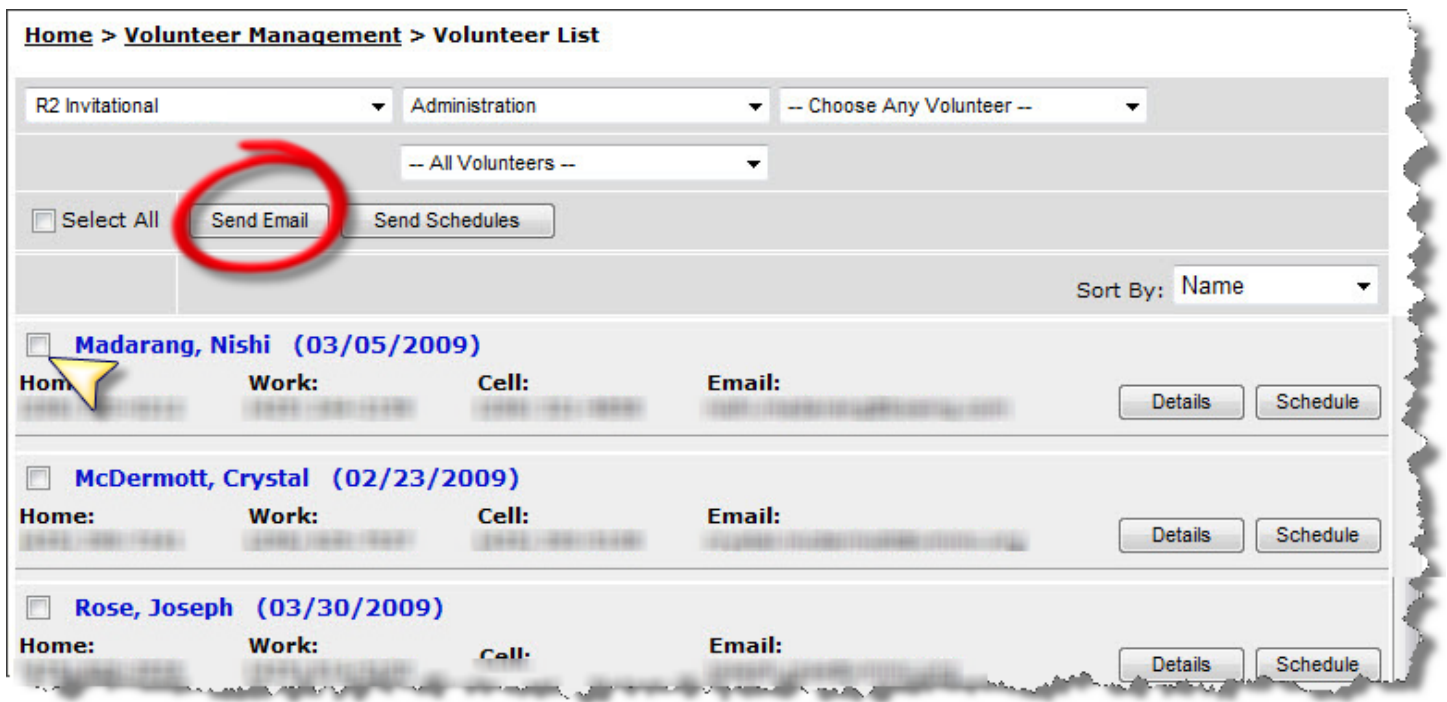| Volunteer Name | 6AM | 7AM | 8AM | 9AM | 10AM | 11AM | 12PM | 1PM | 2PM | 3PM | 4PM | 5PM | 6PM | 7PM | 8PM |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Adele, Hilary | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Brockett, Pat | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Byrer, Loralie | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Graves, Suzie | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Haley, Sue | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Hallstaff, Eric | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Janssen, Yvonne | | — | — | — | — | — | — | — | — | — | — | — | — | | |
| Kerkof, Constance | | | | | | | — | — | — | — | — | — | — | — | — |
| Lewis, Nora | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Madrid, Gail | | | | | | | — | — | — | — | — | — | — | — | — |
| McGuire, Jim | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Nelson, Jean O. | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Pella, Elizabeth | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Pierce, Sue | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Schaeffer, James | | | — | — | — | — | — | — | — | — | — | — | — | | |
| Underwood, Roger | | | — | — | — | — | — | — | — | — | — | — | — | | |
| **Total Coverage:** | 0 | 0 | 0 | 1 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 16 | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |

Figure 10

**Email Capability**

**Sending Standard Message**

As a chairperson, you have the ability to email **messages** on an individual basis or a committee basis.  Bring up the **Volunteer List** (Figure 3**).**  Select each volunteer you would like to send an email. You select a volunteer, click the checkbox to the left of the volunteer name.  If you would like to send an email to all your volunteers, click the **Select All** checkbox.  Click again, to de-select all volunteers.  After selecting your volunteers, click **Send Email.**  This action will bring up an email window in which you may enter a subject, a message, and an attachment.  You will hit Send to complete the process.

**Sending Schedule**

As a chairperson, you have the ability to email **volunteer schedules** on an individual basis or a committee basis. Bring up the **Volunteer List** (Figure 3**).**  Select each volunteer you would like to send a schedule. You select a volunteer, click the checkbox to the left of the volunteer name.  If you would like to send a schedule to all your volunteers, click the **Select All** checkbox.  Click again, to de-select all volunteers.  After selecting your volunteers, click **Send Schedules.**  Each volunteer will receive their schedule information.

**IMPORTANT:**  *Clicking **Send Schedules** will immediately send schedules without further prompts.*



Figure 3

The above tutorial should help you to accomplish your duties as a committee chairperson.

Over the next two pages, we describe the Committee List and the Volunteer List in slightly more detail.

## Committee List

By selecting Committee List, you will see a list of committees for which you have been granted access to (Figure 4).  These committees usually include any committees for which you are a chairperson, or committees that have been made available to you for some other reason.
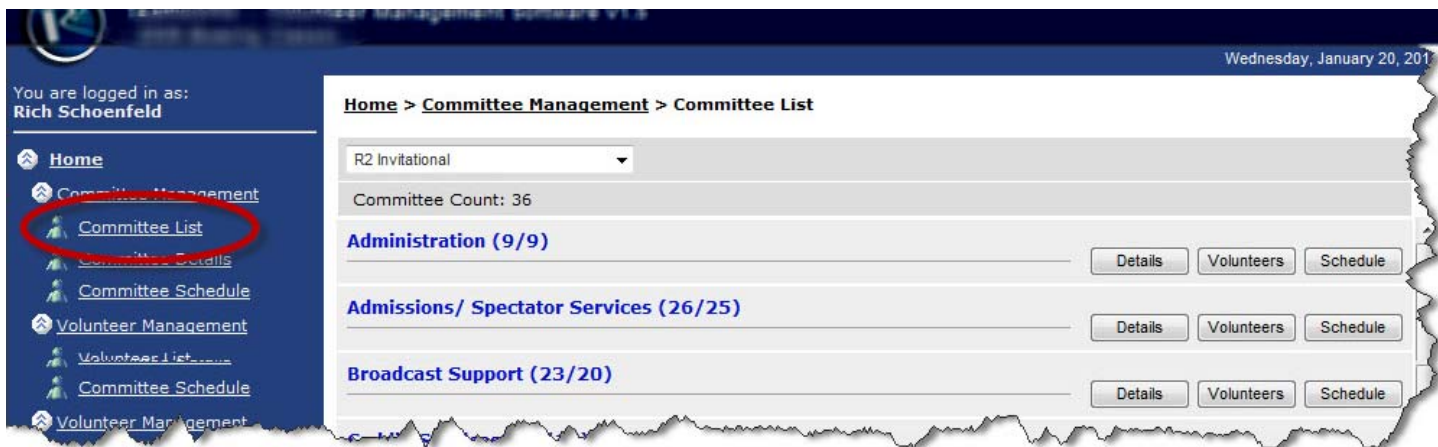


Figure 4

The numbers in parenthesis to the right of the committee name indicates how many volunteers are in the committee followed by the number of volunteers needed for that committee.

## Volunteer List

Pertinent contact information can be found in the volunteer list (Figure 5).  The date the volunteer was assigned to the committee is listed next to their names.  Phone numbers and email information can be found easily. Notice that the list can be sorted by Name (alphabetical) or by Assigned Date.  If you sort by Assigned Date, you will find the most recent volunteers at the top of the list.
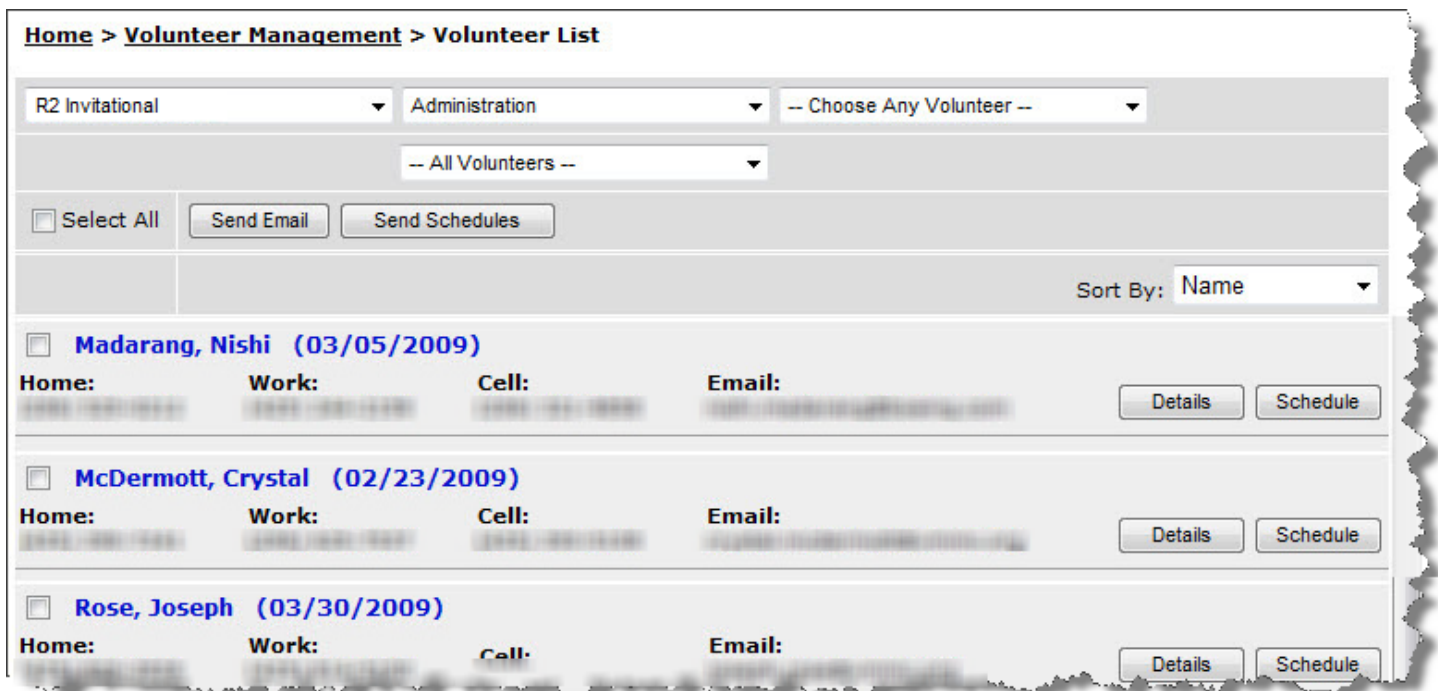


Figure 5

By clicking the Details button, you can find much more information pertaining to your volunteer (Figure 6).

| R2 Invitational ▼ | Administration ▼ | Madarang, Nishi ▼ |

Send Email

**Committee Preferences:**
1: Administration
2: Volunteer Tent

**Experience:**

**Notes:**
Please switch Committees

**Disabilities:**

**Schedule With:**

**Recruiter:**

**Starting Year:**
2009

**Years Worked:**
1

**Preferred Location:**

**License Number:**

**Preferred Number of Shifts:**
4

**Vehicle Form:**
False

**Has Photo:**
False

**Work Before the Tournament:**
True

**Work After the Tournament:**
False

**Volunteer Party:**
False

**Party Guests:**
0

**Volunteer Party Paid:**
False

Figure 6

**Conclusion**

We hope you find the TeamWorks application useful.  We welcome your comments and suggestions to improve your user experience with the program.

Forward any comments you have to rschoenfeld@r2it.com

Thank you.
R2 Innovative Technologies