

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
- 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 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:

Password:

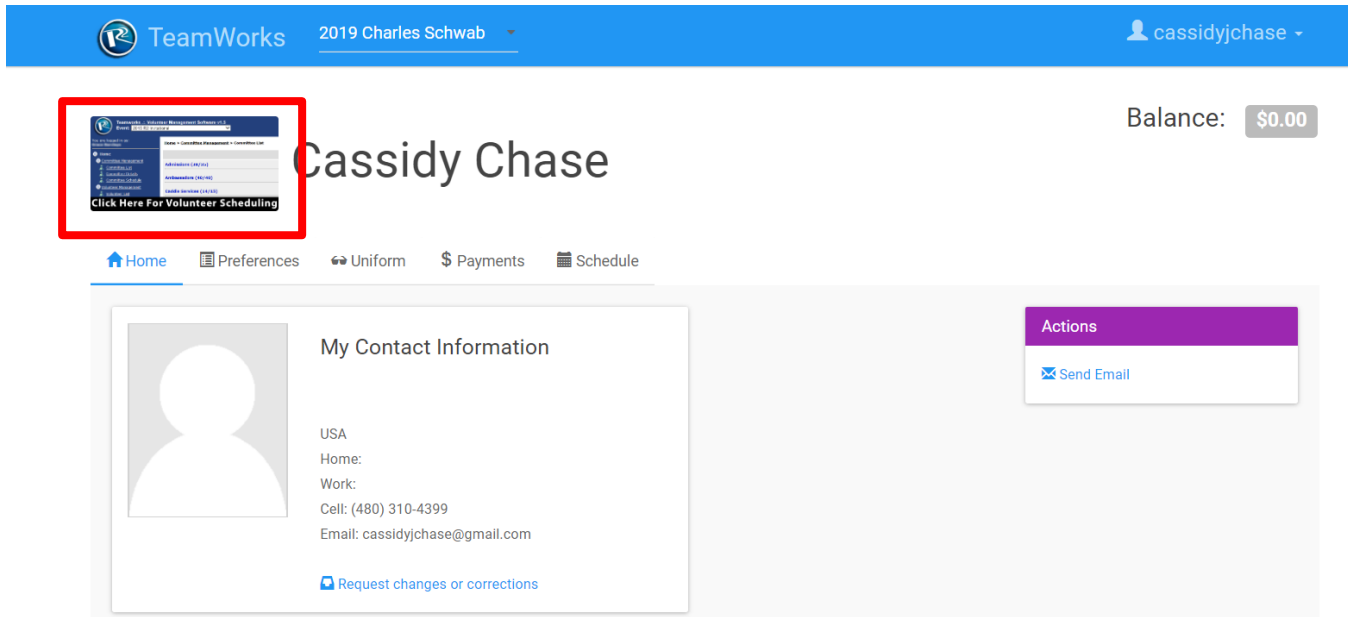
☐ Remember Me

[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**").

A screenshot of the TeamWorks web application interface. At the top is a blue navigation bar with the TeamWorks logo, the text "2019 Charles Schwab", and a user profile icon labeled "cassidyjchase". Below the navigation bar, on the left, is a sidebar menu with a red box highlighting a button that says "Click Here For Volunteer Scheduling". To the right of the sidebar, the user's name "Cassidy Chase" is displayed, along with a "Balance: \$0.00" status. Below the name is a horizontal menu with links: Home, Preferences, Uniform, Payments, and Schedule. The main content area features a "My Contact Information" section with a placeholder for a profile picture and contact details: USA, Home, Work, Cell: (480) 310-4399, and Email: cassidyjchase@gmail.com. A link "Request changes or corrections" is at the bottom of this section. To the right of the contact information is an "Actions" box with a "Send Email" button.



Teamworks ... Volunteer Management Software v1.6

Event: 2019 Charles Schwab ▾

You are logged in as:
Cassidy Chase

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

- [Send Email](#)
- [Email History](#)

Logout

Powered by:
R2 Innovative Technologies
© Copyright 2019,
All Rights Reserved
[Need Technical Support?](#)

Home

Welcome Cassidy!

Please choose a menu option from the left.

Latest Updates

Preference Report Changes

- Added "Include additional information" option that will include volunteer notes in the report.
- Added Excel export option.

New Report / Volunteer Schedule Enhancement

- New Report:
 - Schedule Details
- Volunteer Schedule:
 - Schedule notes will now be included in the volunteer schedule printout.

Volunteer List Changes

- Added Years of Service.
- Added ability to sort volunteers by Years of Service.

Scheduler Improvements

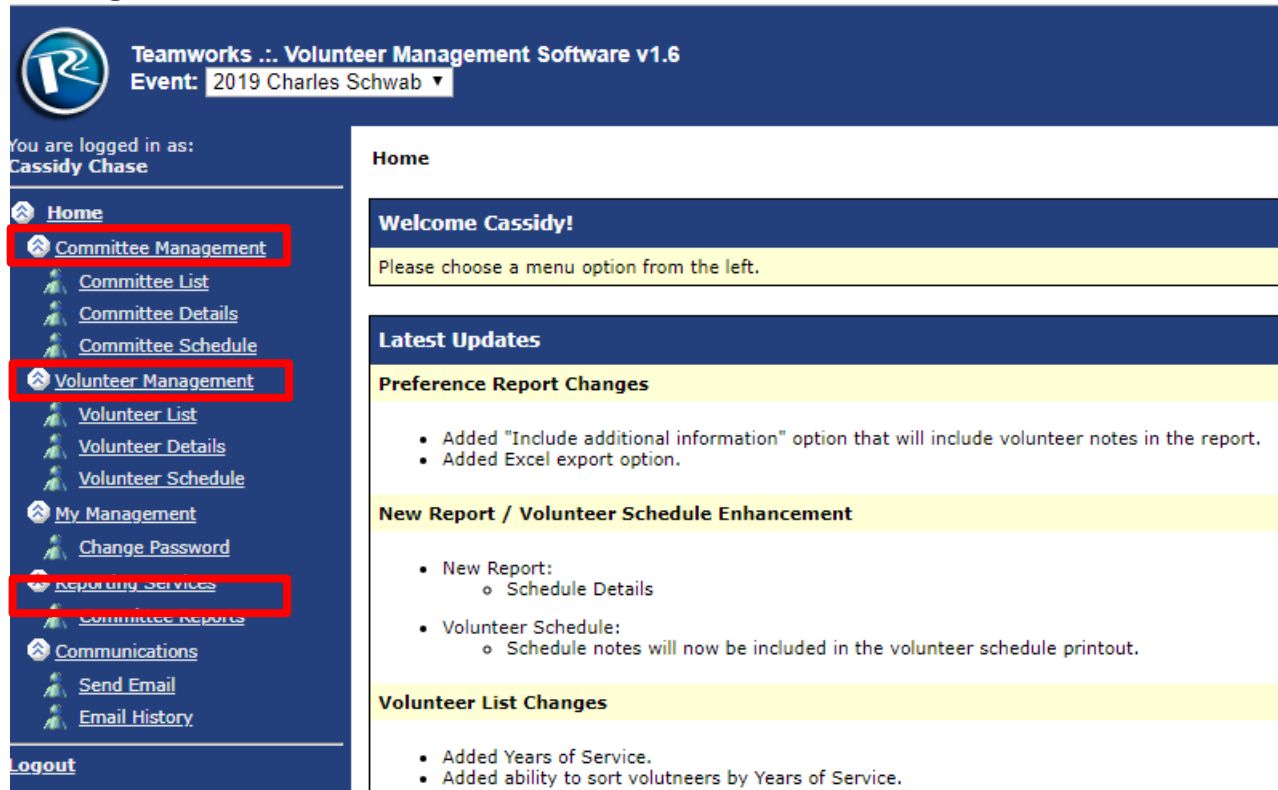
- Committee Schedule:
 - Interface improvements for touch-capable devices.
 - Added ability to view volunteer preferences.
 - Added ability to set shift notes/location.
 - Clicking on a volunteer's name will now bring you to the Volunteer Schedule page.
- Volunteer Schedule:
 - Interface improvements for touch-capable devices.

Email History

- You can now review emails you have sent on the Email History page.
Note: Email history will not go further back than December 19th, 2017.

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 v1.6
Event: 2019 Charles Schwab ▼

You are logged in as:
Cassidy Chase

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

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Send Email

Email History

Logout

Home

Welcome Cassidy!

Please choose a menu option from the left.

Latest Updates

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- Added "Include additional information" option that will include volunteer notes in the report.
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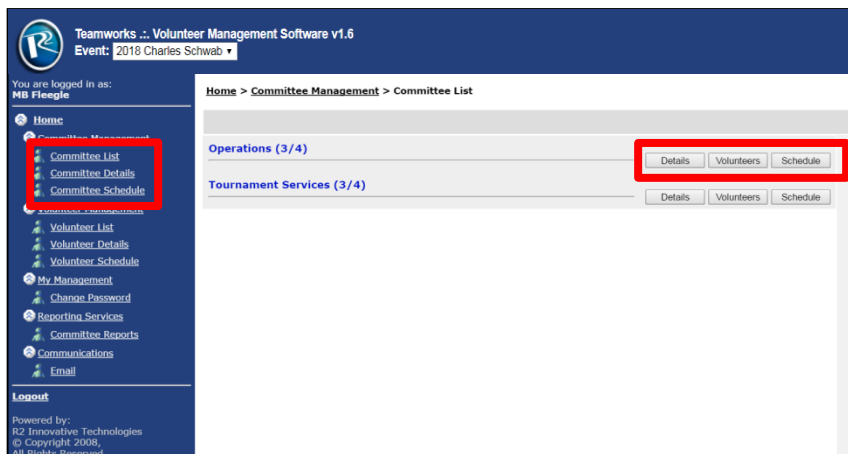
New Report / Volunteer Schedule Enhancement

- New Report:
 - Schedule Details
- Volunteer Schedule:
 - Schedule notes will now be included in the volunteer schedule printout.

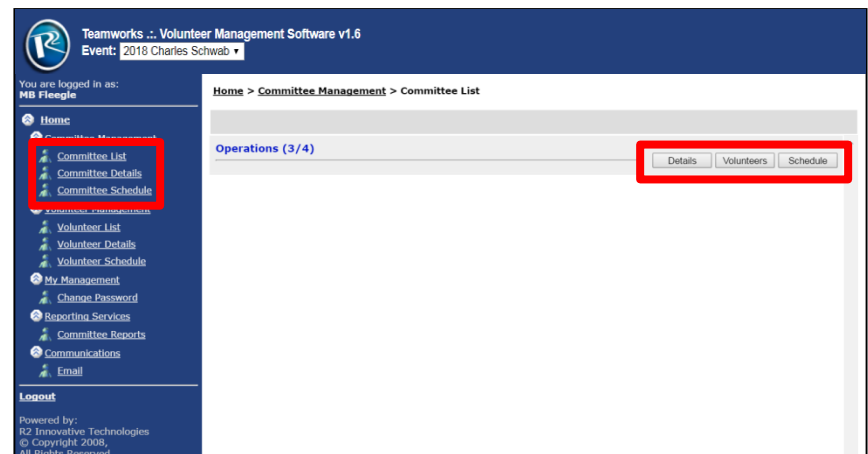
Volunteer List Changes

- Added Years of Service.
- Added ability to sort volunteers by Years of Service.

- 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



Teamworks :: Volunteer Management Software v1.6

Event: 2019 Charles Schwab ▼

You are logged in as:
Cassidy Chase

- [Home](#)
- [Committee Management](#)
 - [Committee List](#)
 - [Committee Details](#)
 - [Committee Schedule](#)
- [Volunteer Management](#)
 - [Volunteer List](#)

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

Tournament Services ▼

Tournament Services


Description:
Capacity: 2
Status: **True**
Chairmen: **Cassidy Chase;**

[Volunteers](#)

[Schedule](#)

- 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).*

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

Tournament Services ▼		-- Committee Volunteers -- ▼	
<input type="checkbox"/> Select All	Send Email	Send Schedules	Download Photos
			Volunteer Count: (0/2)
			Sort By: Name ▼
<input type="checkbox"/>	 Chase, Cassidy (C)	Location: Details Schedule	
	Assigned Date: 04/16/2019	YOS: 3	
Home:	Work:	Cell: (480) 310-4399	Email: cassidyjchase@gmail.com

Designates
Committee
Chairman

- 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 v1.6
Schwab ▾

Home > Committee Management > Committee Schedule

Tournament Services ▾ Saturday, October 19, 2019 ▾

	12 AM	1 AM	2 AM	3 AM	4 AM	5 AM	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
<input type="checkbox"/> Chase, Cassidy	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30

Set Location...

Before Scheduling

Volunteer Management Software v1.6
Schwab ▾

Home > Committee Management > Committee Schedule

Tournament Services ▾ Saturday, October 19, 2019 ▾ Enter \

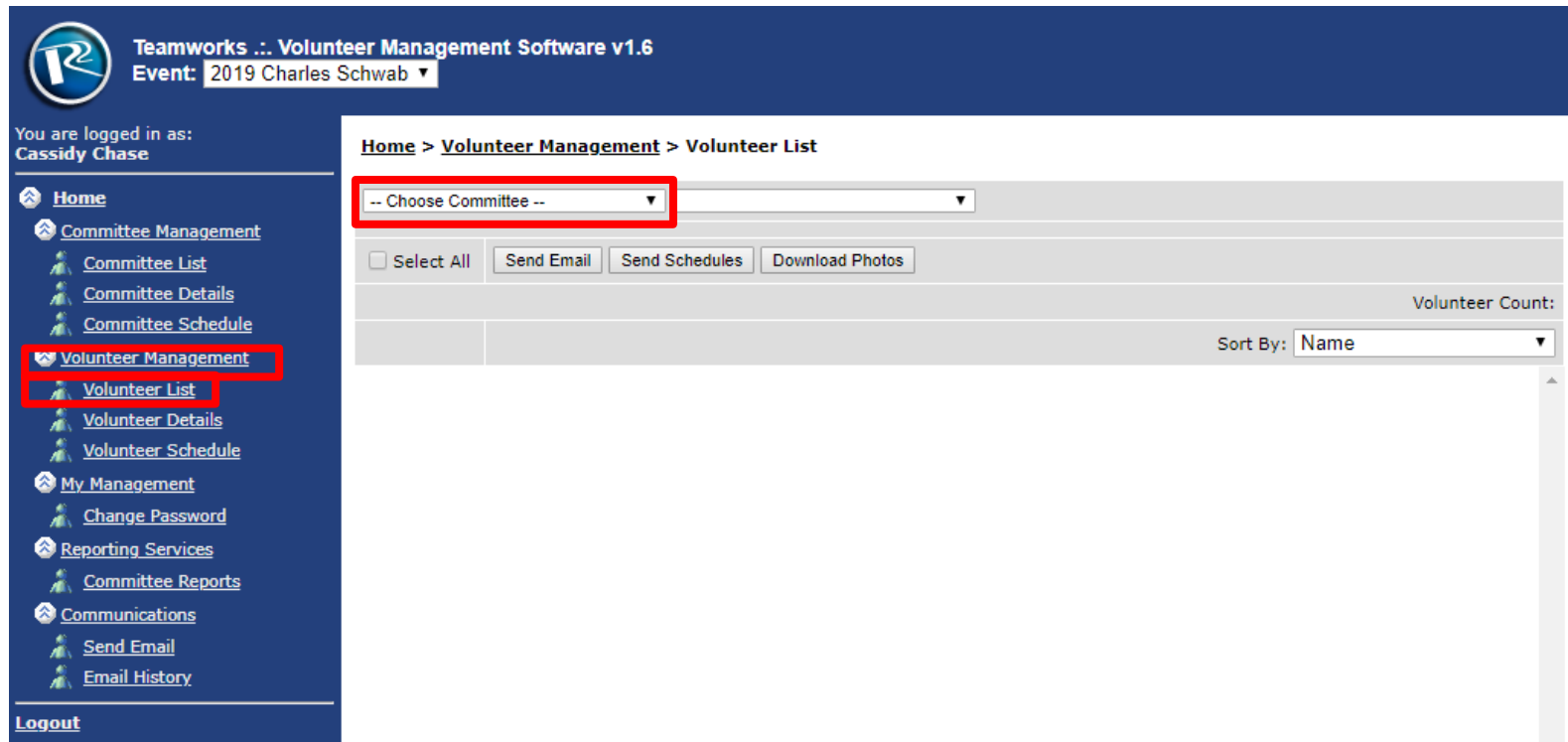
	12 AM	1 AM	2 AM	3 AM	4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM
<input type="checkbox"/> Chase, Cassidy	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30

7:00 AM - 3:30 PM

Set Location...

After Scheduling

- 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.



Teamworks ... Volunteer Management Software v1.6
Event: 2019 Charles Schwab ▼

You are logged in as:
Cassidy Chase

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
Send Email
Email History
Logout

Home > Volunteer Management > Volunteer List

-- Choose Committee -- ▼

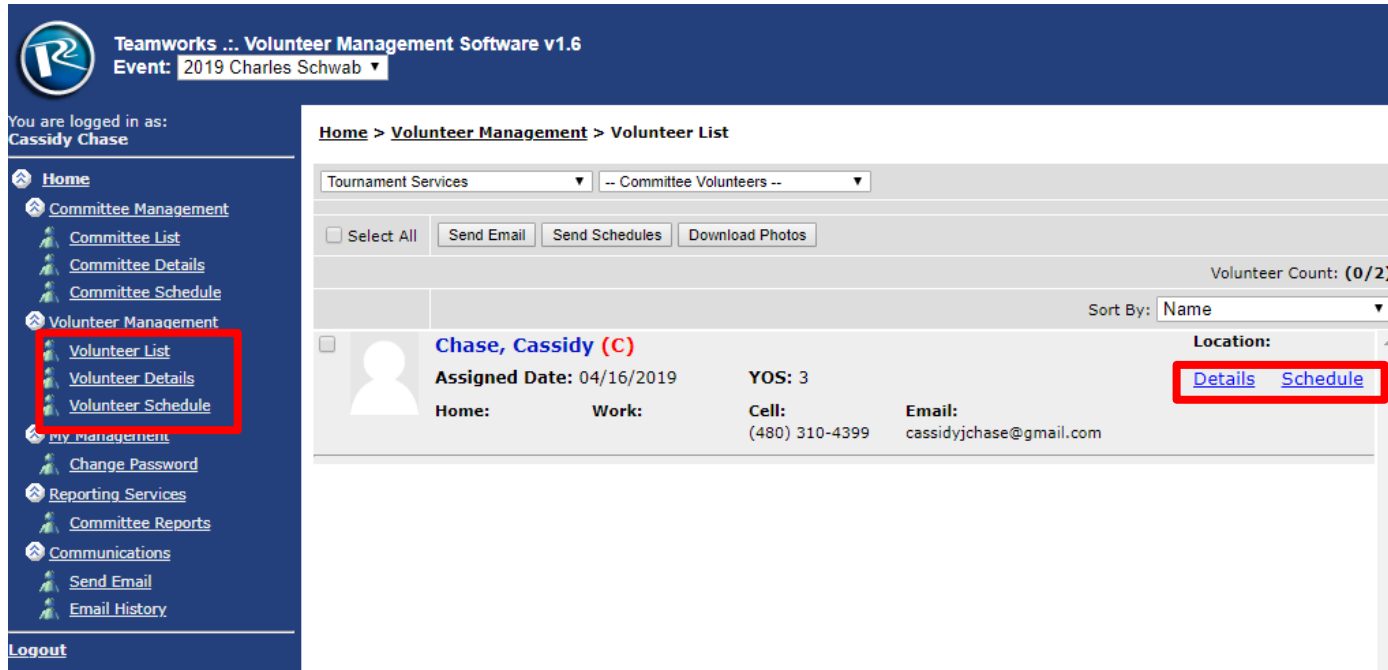
☐ Select All

Volunteer Count:

Sort By: Name ▼

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 v1.6
Event: 2019 Charles Schwab

You are logged in as:
Cassidy Chase


Home > Volunteer Management > Volunteer List

Tournament Services -- Committee Volunteers --

☐ Select All

Volunteer Count: (0/2)

Sort By: Name

☐  **Chase, Cassidy (C)** Location: [Details](#) [Schedule](#)

Assigned Date: 04/16/2019 YOS: 3

Home: Work: Cell: Email:

(480) 310-4399 cassidyjchase@gmail.com

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 **Send Email** **Send Schedules** Download Photos

Volunteer Count: (0/2)

Sort By: Name

<input type="checkbox"/>	 <p>Chase, Cassidy (C)</p> <p>Assigned Date: 04/16/2019 YOS: 3</p> <p>Home: Work: Cell: (480) 310-4399 Email: cassidyjchase@gmail.com</p> <p>Location: Details Schedule</p>
--------------------------	---

Note: Turn off pop-up blockers for www.teamworks.r2it.com.

SEND EMAIL

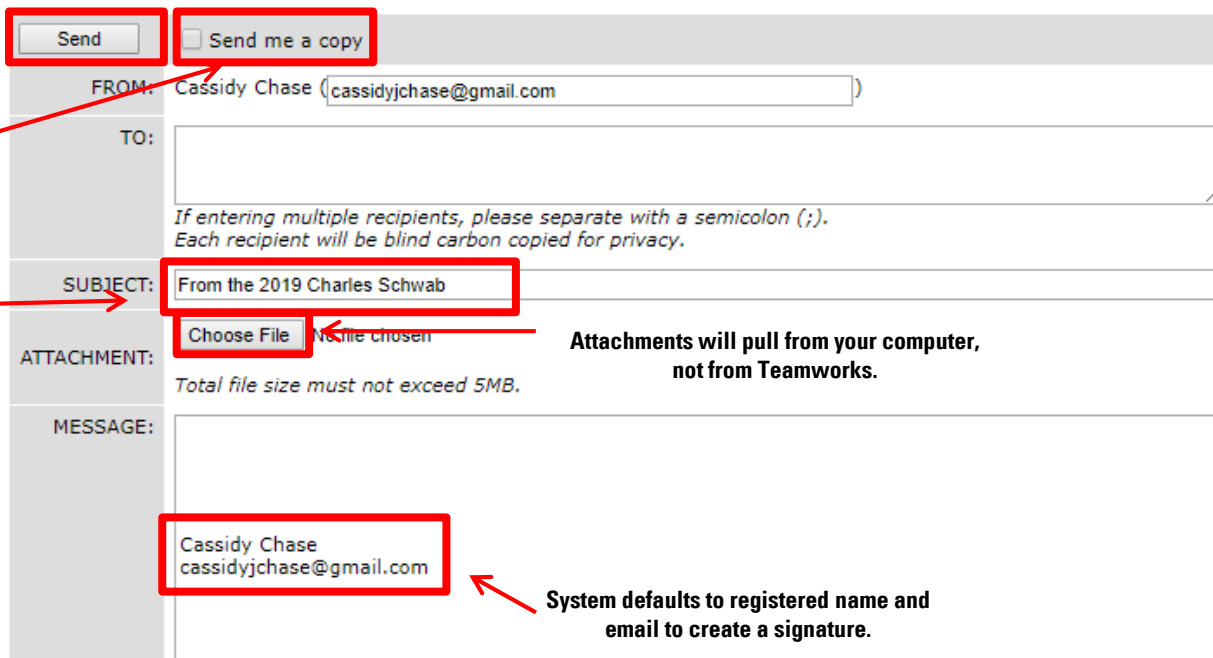
- Once a volunteer(s) have been selected and you click on **"Send Email"**, a screen will pop-up to edit the contents of the email.
- All fields are editable.
- After all fields have been updated, click **"Send"**.
- **Note:** When volunteers receive the email it will come from a "@r2it.com" email address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

We suggest sending a copy to yourself.

Carefully choose subject line – suggest including "2018 Charles Schwab".

Attachments will pull from your computer, not from Teamworks.

System defaults to registered name and email to create a signature.



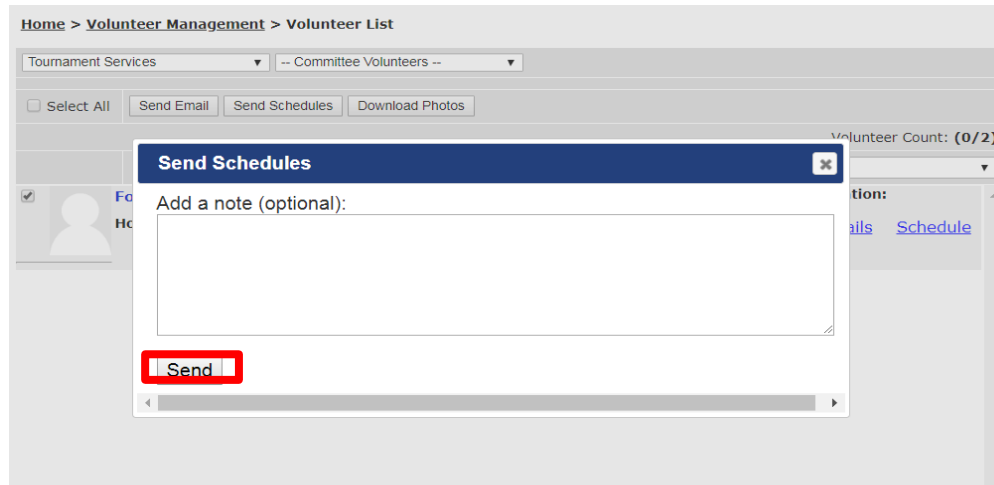
The form contains the following fields and elements:

- Buttons:** "Send" (highlighted), "Send me a copy" (checkbox, highlighted).
- FROM:** Cassidy Chase (cassidyjchase@gmail.com) (highlighted).
- TO:** Empty text field.
- Instructions:** "If entering multiple recipients, please separate with a semicolon (;). Each recipient will be blind carbon copied for privacy."
- SUBJECT:** "From the 2019 Charles Schwab" (highlighted).
- ATTACHMENT:** "Choose File" button (highlighted), "No file chosen" text, "Total file size must not exceed 5MB."
- MESSAGE:** Large text area containing the signature: "Cassidy Chase", "cassidyjchase@gmail.com" (highlighted).

Note: Turn off pop-up blockers for 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 "2019 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*).



The screenshot shows a web interface for 'Volunteer Management' with a 'Volunteer List' tab. A 'Send Schedules' pop-up window is displayed. The pop-up has a title bar 'Send Schedules' with a close button. Below the title bar is a text area labeled 'Add a note (optional):'. At the bottom of the pop-up is a 'Send' button, which is highlighted with a red rectangle. The background interface includes a 'Tournament Services' dropdown, a 'Committee Volunteers' dropdown, and buttons for 'Select All', 'Send Email', 'Send Schedules', and 'Download Photos'. A 'Volunteer Count: (0/2)' is also visible.

Note: Turn off pop-up blockers for 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 ▼

Committee Preferences:

Primary Address:
707 East Main Street
Richmond, VA 23219

Secondary Address:
/

Experience:

Notes:

Disabilities:

Schedule With:

Recruiter:

Starting Year:
2016

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 ▼ Chase, Cassidy ▼

10/19/2019 ▼

Print Schedule

	Sat 10/19	Sun 10/20	Mon 10/21	Tue 10/22	Wed 10/23	Thu 10/24	Fri 10/25	Sat 10/26	Sun 10/27
6 AM									
7 AM									
8 AM									
9 AM									
10 AM									
11 AM									
12 PM									
1 PM									
2 PM									

Key	
	Scheduled Time
	Preferred Time
	Scheduled Time On Another Committee
	Preferred Time On Another Committee

- Schedule will appear for **10/19/19 – 11/12/19**
- 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 Chase, Cassidy 11/03/2019 Print Schedule

	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 (12:00 PM - 6:00 PM) Right-click for options.			
1 PM											
2 PM											
3 PM											
4 PM											

- 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 Chase, Cassidy 11/03/2019 Print Schedule

	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

- 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 Chase, Cassidy 11/03/2019 Print Schedule

	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 AM		(6:00 AM		Preferred Time
8 AM						- 6:00 PM)	- 2:00 PM)		- 6:00 PM)		Scheduled Time On Another Committee
9 AM							Right-click for options.		Right-click for options.		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

- 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.

Wed 11/02 **Thu 11/03** **Fri 11/04** **Sat 11/05** **Sun 11/06** **Mon 11/07**

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.

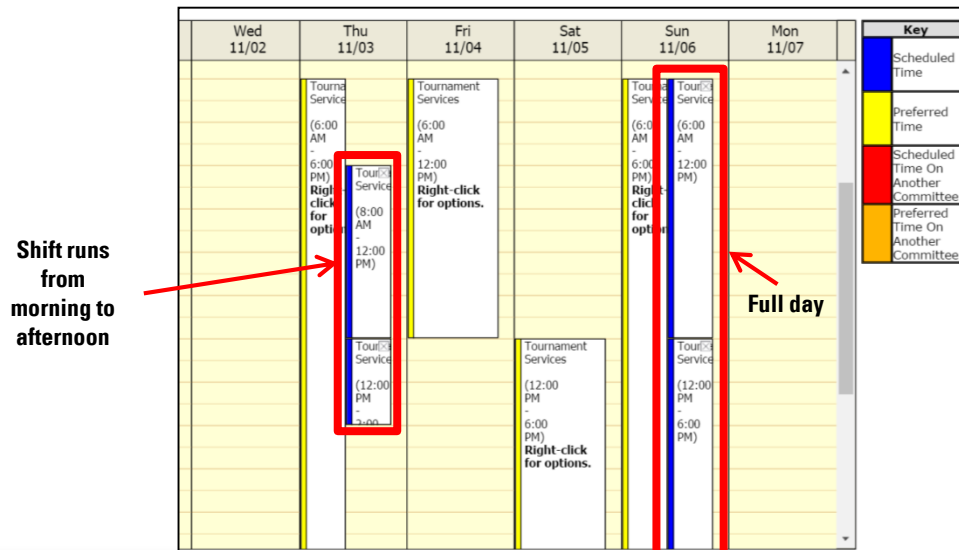
Delete scheduled time

Drag schedule up or down to change time

Key

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

- 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 can run 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.)



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

- 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 Chase, Cassidy 11/03/2019 Print Schedule

	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)	Tourna Service (6:00 AM)		Tourna Service (6:00 AM)
7 AM							
8 AM							
9 AM							
10 AM							
11 AM							

Daily Schedule 18 / 23

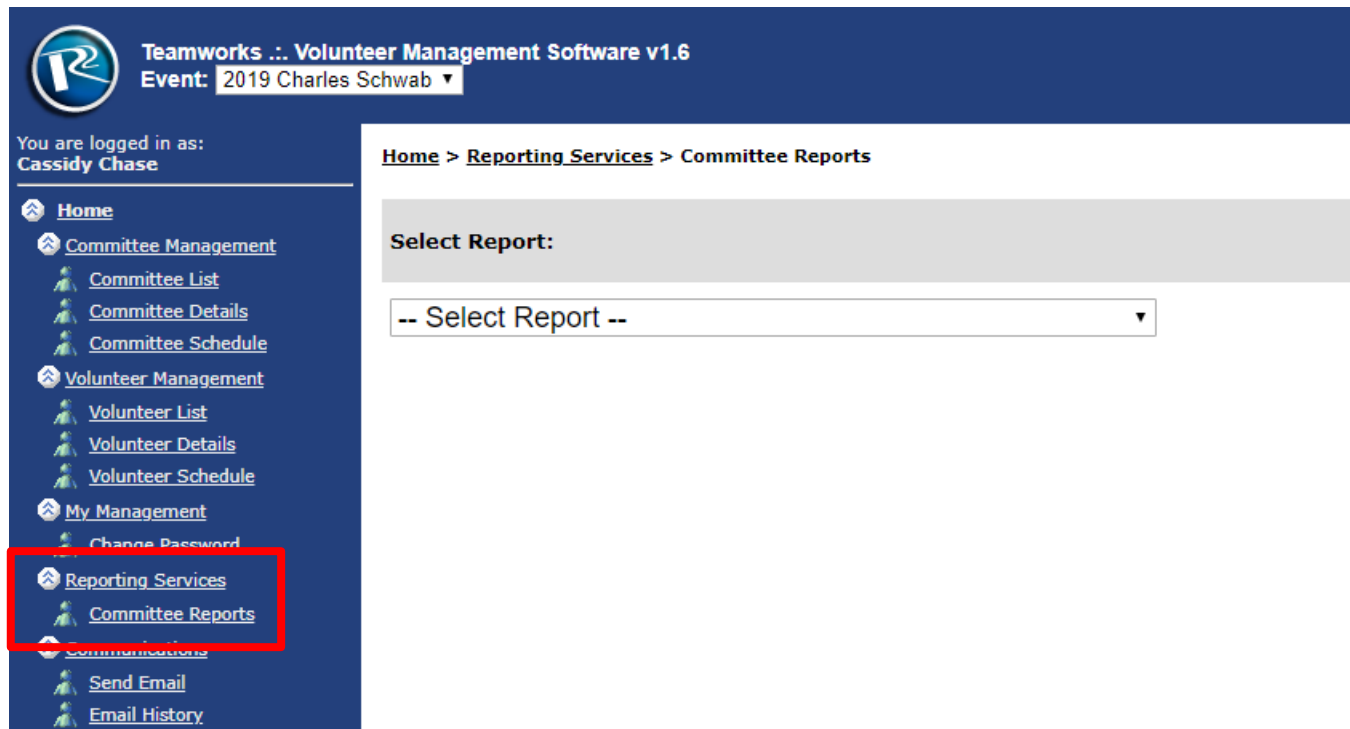
Caddies Services
Tuesday, 11/06/2018

2018 Charles Schwab
Daily Schedule

Volunteer	06:30 AM	07:30	08:30	09:30	10:30	11:30	12:30 PM	01:30	02:30	03:30	04:30	05:30
McKenzie, Thomas												
Basovsky, Rudolph												
Johnson, Robert												
McKenzie, Deborah												
Read, Richard												
Wing, Vivian												
Chairs:	-	-	-	-	-	-	-	-	-	-	-	-
Volunteers:	1	1	1	1	1	1	1	1	1	1	1	1
Total:	1	1	1	1	1	1	1	1	1	1	1	1

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.



Teamworks ... Volunteer Management Software v1.6
Event: 2019 Charles Schwab ▼

You are logged in as:
Cassidy Chase

Home

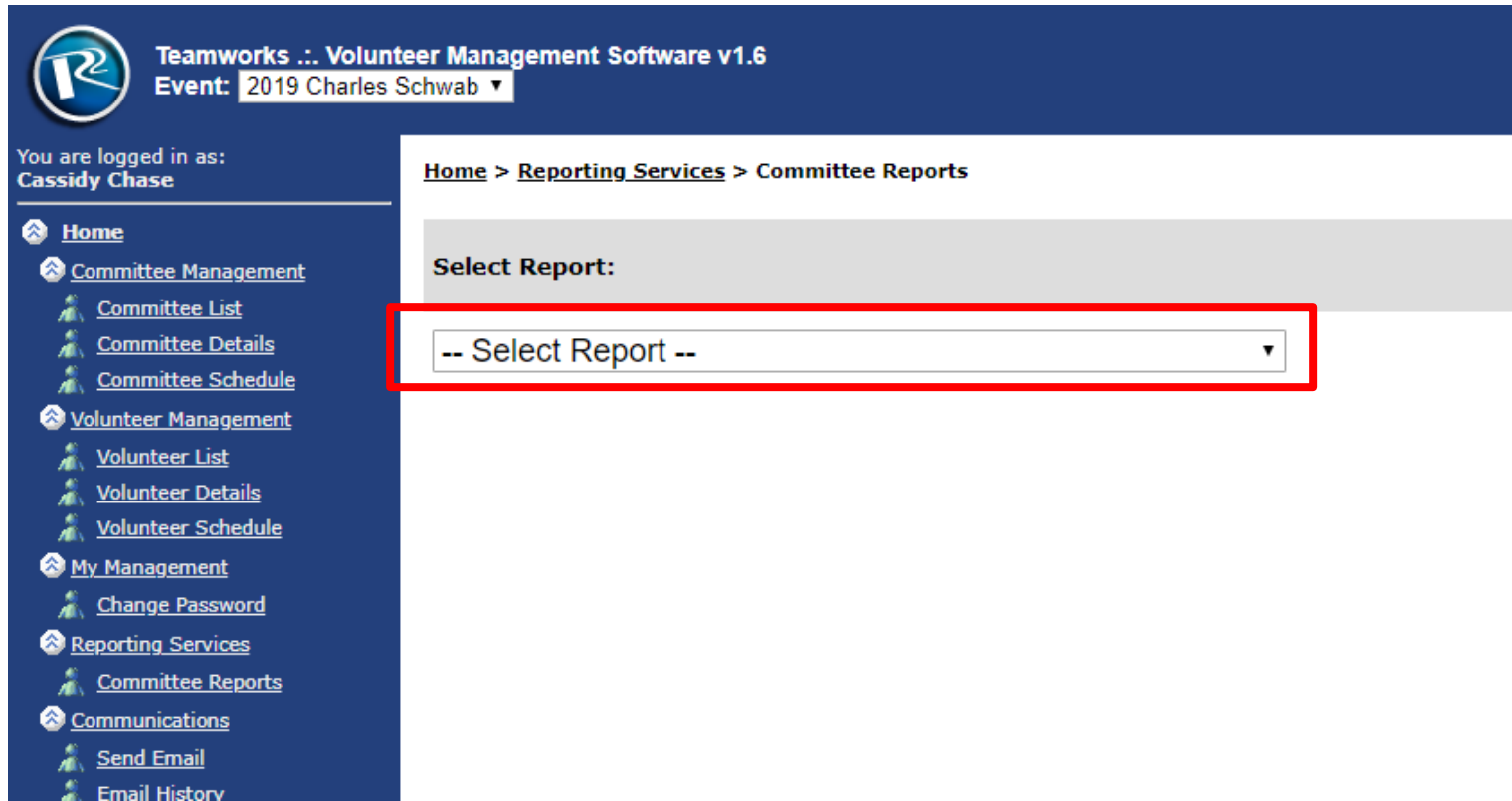
- Committee Management
 - Committee List
 - Committee Details
 - Committee Schedule
- Volunteer Management
 - Volunteer List
 - Volunteer Details
 - Volunteer Schedule
- My Management
 - Change Password
- Reporting Services**
 - Committee Reports**
- Communications
 - Send Email
 - Email History

Home > Reporting Services > Committee Reports

Select Report:

-- Select Report -- ▼

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



Teamworks ... Volunteer Management Software v1.6
Event: 2019 Charles Schwab ▼

You are logged in as:
Cassidy Chase

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


Select Report:

-- Select Report -- ▼

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. **Check-in List*:** Alphabetical check-in list of all volunteers for the designated committee.
4. **Check-in Report:** Scheduled hours vs actual hours.
5. **Contact List*:** Alphabetical contact list for the designated committee.
6. **Committee Preferences:** Preferred working locations.
7. **Contact List (Notes):** Alphabetical contact list for the designated committee with experiences and notes included.
8. **Daily Preferences:** Desired work days.


***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

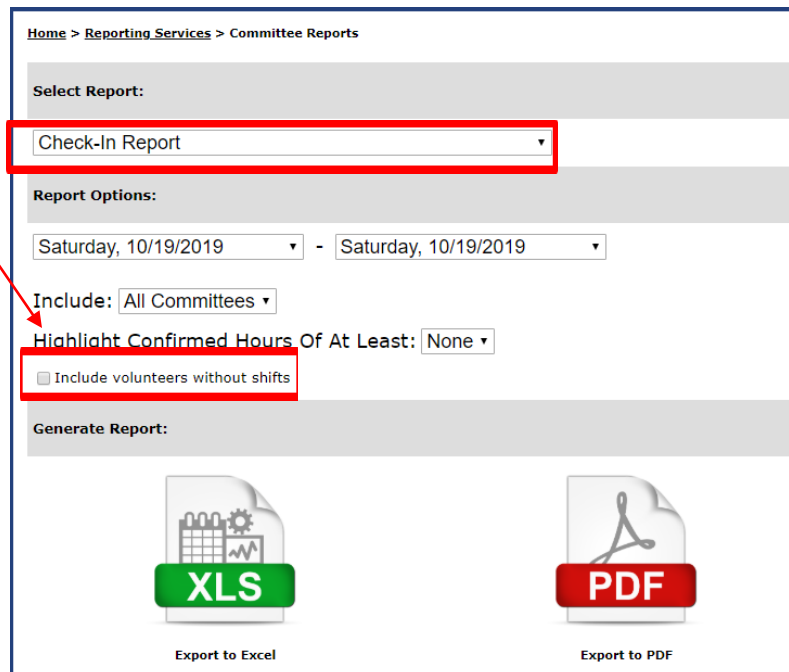
8. **Daily Schedule***: Schedule of all volunteers for the designated committee, by day.
9. **Schedule (Working Only)***: Schedule of volunteers for the designated committee working on a specific day. Those volunteers not scheduled on a specific day will not appear on this report.
10. **Daily Schedule Timeline**: Report of all volunteers for the designated committee and the time they are working in single day format.
11. **Preferences**: Displays preference, by volunteer, of am and pm shifts during tournament week.
12. **Schedule Totals**: Hour count per volunteer per day.
13. **Volunteer Scheduling Notes**: Alphabetical list of all volunteers including years experience, request for scheduling, with another volunteer, etc. 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

- Select the report you will view or print.
- Choose the appropriate date in the drop-down lists.
- 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.
- Check the box marked "Include volunteers without shifts" to view all available schedules.

A screenshot of a web application interface for generating reports. The breadcrumb trail at the top reads "Home > Reporting Services > Committee Reports". The "Select Report:" section contains a dropdown menu with "Check-In Report" selected, highlighted by a red rectangle. The "Report Options:" section includes two date dropdowns both set to "Saturday, 10/19/2019". Below these, the "Include:" dropdown is set to "All Committees". The "Highlight Confirmed Hours Of At Least:" dropdown is set to "None". A checkbox labeled "Include volunteers without shifts" is checked and highlighted by a red rectangle. A red arrow points from the fifth bullet point of the list above to this checkbox. At the bottom, the "Generate Report:" section features two buttons: "XLS" (labeled "Export to Excel") and "PDF" (labeled "Export to PDF").

Home > Reporting Services > Committee Reports

Select Report:

Check-In Report

Report Options:

Saturday, 10/19/2019 - Saturday, 10/19/2019

Include: All Committees

Highlight Confirmed Hours Of At Least: None

☒ Include volunteers without shifts

Generate Report:

XLS PDF

Export to Excel Export to PDF

DAILY PREFERENCES

- 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.

Daily Schedule 18 / 23

Caddies Services Saturday, 10/19/2019		2019 Charles Schwab Daily Preferences											
Volunteer	06 :30 AM	07 :30	08 :30	09 :30	10 :30	11 :30	12 :30 PM	01 :30	02 :30	03 :30	04 :30	05 :30	
(C) McKenzie, Thomas													
Basovsky, Rudolph													
Johnson, Robert													
McKenzie, Deborah													
Read, Richard													
Wing, Vivian													
Chairs:	-	-	-	-	-	-	-	-	-	-	-	-	-
Volunteers:	1	1	1	1	1	1	1	1	1	1	1	1	1
Total:	1	1	1	1	1	1	1	1	1	1	1	1	1

CHECK-IN LIST

- **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 Headquarters, but this can also be used to track volunteer arrival.

Check-In List

1 / 1

Caddies Services

Saturday, 10/19/2019

2019 Charles Schwab

Daily Preferences

Name	Phone	Hours Scheduled	Time	Signature
Basovsky, Rudolph	(847) 323-6259(C)	12		

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

2019 Charles Schwab Contact List

Name	YOS	Address	City	State	Zip	Phone	Email
Chase, Cassidy	3		Phoenix	AZ	85015	(480) 310-4399(C)	cassidyjchase@gmail.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 can be adjusted after volunteers have been scheduled to identify coverage and gaps that need to be filled.

Office Support												2019 Charles Schwab Schedule			
Monday, 11/04/2019 - Saturday, 11/09/2019															
	Monday 11/04/19		Tuesday 11/05/19		Wednesday 11/06/19		Thursday 11/07/19		Friday 11/08/19		Saturday 11/09/19				
	12 AM	NOON	12 AM	NOON	12 AM	NOON	12 AM	NOON	12 AM	NOON	12 AM	NOON			
(C) Fitzwater, Kathy															
Gianiorio, Brianna															
Lifgren, Taylor															
McClellan, Jordan															
Viera, Gabrielle															
Whitaker, William															
Chairs:	1	-	1	-	1	-	-	-	-	-	-	-	-	-	-
Volunteers:	5	-	5	-	2	-	-	-	-	-	-	-	-	-	-
Total:	6	-	6	-	3	-	-	-	-	-	-	-	-	-	-

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.

Office Support

Monday, 11/04/2019 - Sunday, 11/10/2019

2019 Charles Schwab
Schedule

	Monday 11/04/19		Tuesday 11/05/19		Wednesday 11/06/19		Thursday 11/07/19		Friday 11/08/19		Saturday 11/09/19		Sunday 11/10/19	
	12 AM	NOON	12 AM	NOON	12 AM	NOON	12 AM	NOON	12 AM	NOON	12 AM	NOON	12 AM	NOON
(C) Fitzwater, Kathy														
Gianiorio, Brianna														
Lifgren, Taylor														
McClellan, Jordan														
Viera, Gabrielle														
Whitaker, William														
Chairs:	1	-	1	-	1	-	-	-	-	-	-	-	-	-
Volunteers:	5	-	5	-	2	-	-	-	-	-	-	-	-	-
Total:	6	-	6	-	3	-	-	-	-	-	-	-	-	-

PREFERENCES

- Preferences were provided on volunteer applications. To update a volunteer's preferences, please contact Kristi Lee Fowlks.
- **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.

Office Support
Wednesday, 11/06/2019 - Saturday, 11/09/2019

2019 Charles Schwab
Preferences

	Wednesday 11/06/19		Thursday 11/07/19		Friday 11/08/19		Saturday 11/09/19	
	AM	PM	AM	PM	AM	PM	AM	PM
Gianiorio, Brianna YOS: 1								
Lifgren, Taylor YOS: 1								
McClellan, Jordan YOS: 1								
Viera, Gabrielle YOS: 1								
Whitaker, William YOS: 1								
Chairs:	-	-	-	-	-	-	-	-
Volunteers:	4	1	4	1	4	1	5	-
Total:	4	1	4	1	4	1	5	-

- 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.

Cassidy Chase

Balance: \$0.00

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



My Contact Information

6818 North 16th Drive
Phoenix, AZ 85015
USA
Home:
Work:
Cell: (480) 310-4399
Email: cassidyjchase@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. Meetings will take place every other Wednesday.
- **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)

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 31
Identify gaps in committee schedule based on "Available to Work" and/or "Weekly Preferences" report	Committee Chairman	August 31
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 14
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 19 & 26 November 2 (location TBD)
Finalize committee schedule	Division Directors Committee Chairman	October 27
Provide final committee schedule* to Tournament Staff	Division Directors Committee Chairman	October 27

**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

Office: 480.237.2100 x 14

Cell: 503.320.4317