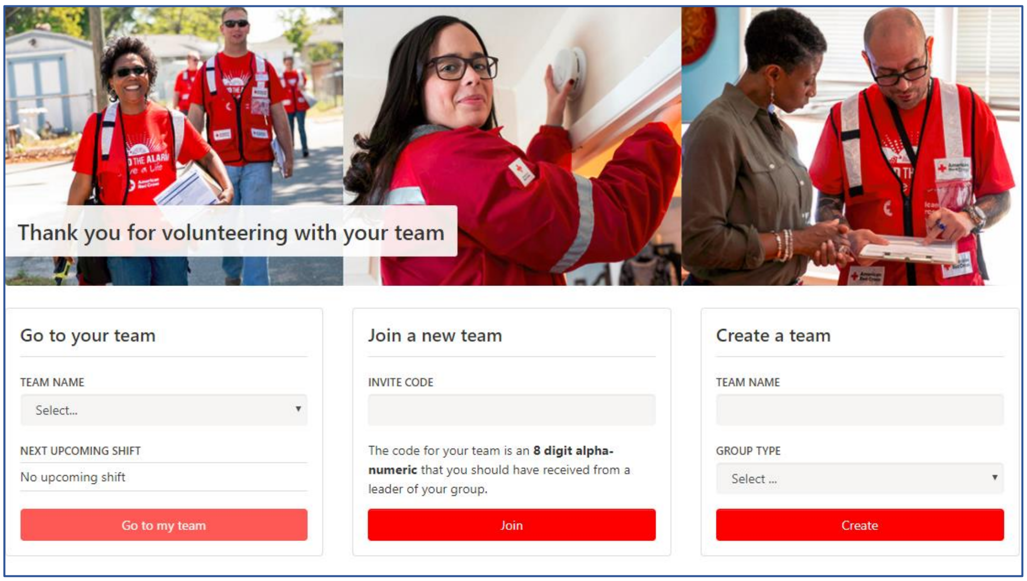
Volunteer Connection: Tip Sheet for Volunteer Administrators
Member Profiles: Team Leader

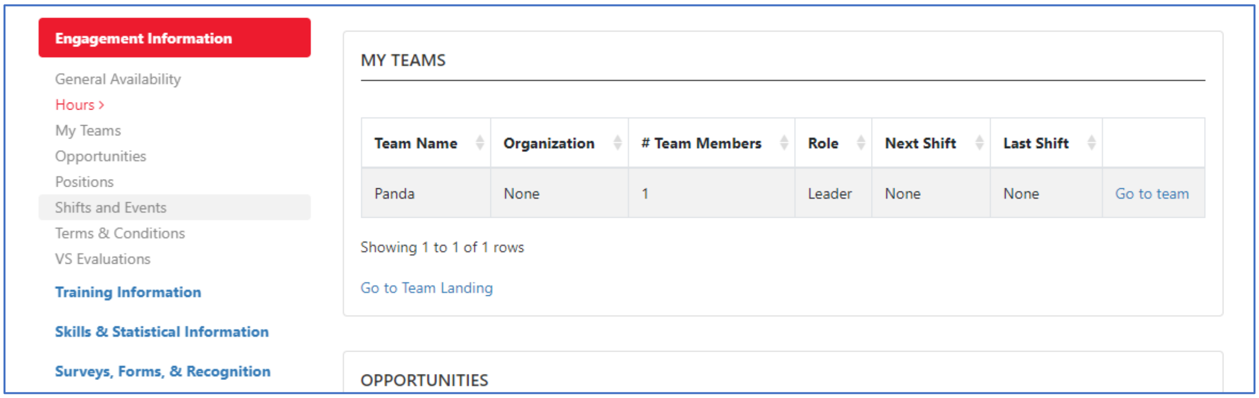
The Team Manager tool allows volunteers to be listed together as a team, for the purposes of participation together on a single-day style event or shift such as a smoke alarm installation day or a golf outing fundraiser. Teams can be created by an administrator with ‘Team Administrator’ to support of certain partnerships between volunteers. Teams can also be created by a volunteer as the Team Leader to create teams for family or friends.

The Teams function is within the Event Based Volunteer registration process and utilizes the Public Shift Tool for events.

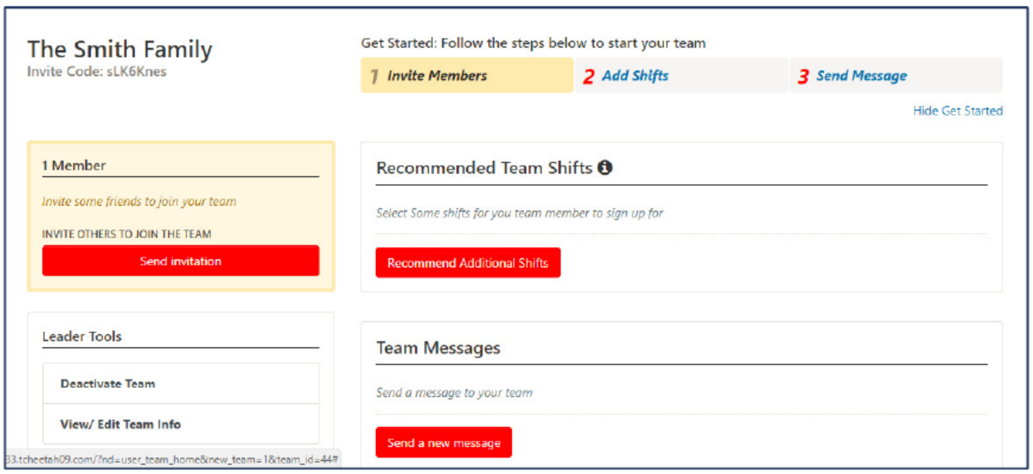


Creating a Team
To create a team, follow these steps:

1. From **My Profile** tab under the **Engagement Information** section, find the **My Teams** section. (or find **Join or Create a Team** on a modified Volunteer Connection Home Page)
2. Click **Go to Teams Landing** (or from the box click **Get Started**)



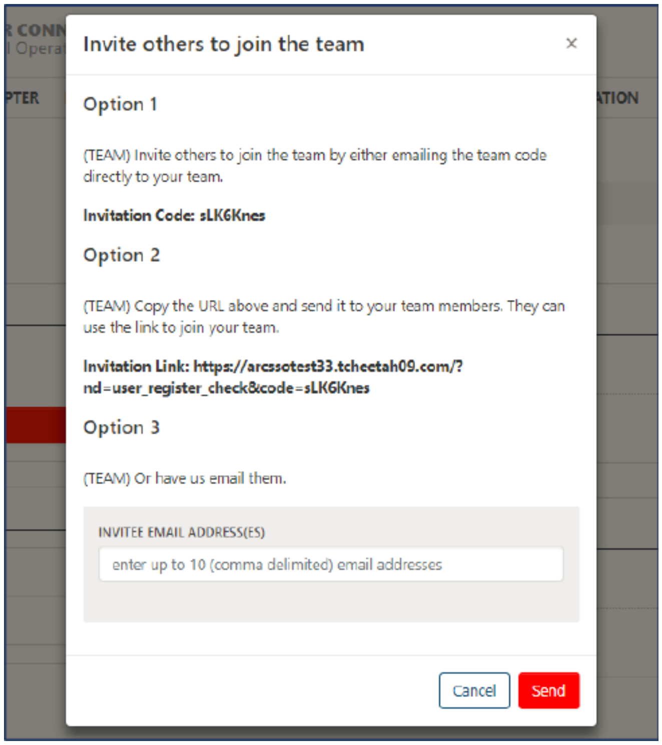
3. Under the **Create a Team** section, enter a **Team Name**.
4. Select a **Group Type** from the dropdown menu.
5. Click **Create**.
6. Follow through the three highlighted steps (**1. Invite Members, 2. Add Shifts, 3. Send Message**) also outlined below, to finish setting up the team.



Inviting Members

To invite members to a Team, follow these steps:

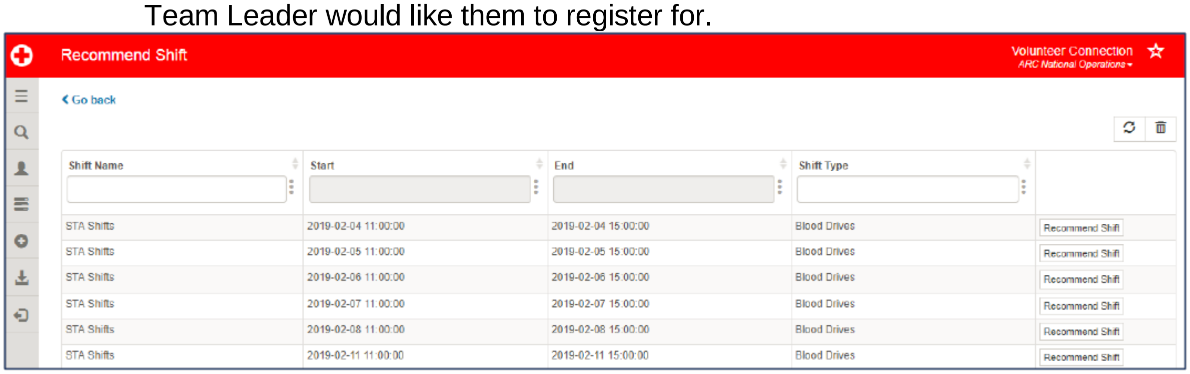
1. Click **Send Invitation** from the Team Leader page.
2. Choose one of 3 options: copy and share the **Invitation Code**, copy and share the **Invitation Link**, or enter the new members email addresses in the **Invitee Email Address(es)** box to have them emailed directly.



Add Shifts

To add shifts to a Team, follow these steps:

1. Click **Recommend Additional Shifts** from the Team Leader page to bring up a list of available shifts from the **Public Shift Tool**.
2. Select shifts with the **Recommend Shift** button to the right of every available shift.
   Note: Selecting shifts to recommend does not register each individual member of the Team but rather allows for each Team Member to see the selected list of shifts the Team Leader would like them to register for.

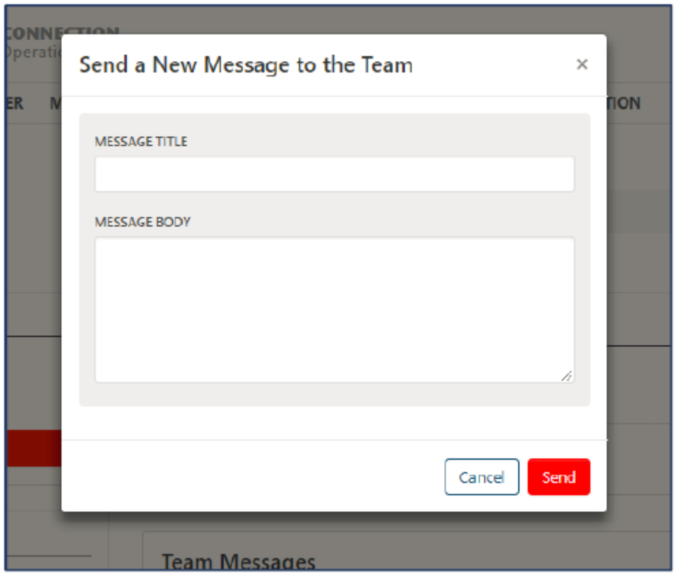


Sending Messages

To add shifts to a Team, follow these steps:

1. Click **Send a New Message** from the Team Leader page.
2. Enter a **Message Title**
3. Enter the **Message Body** with the message you wish to send to the Team members.

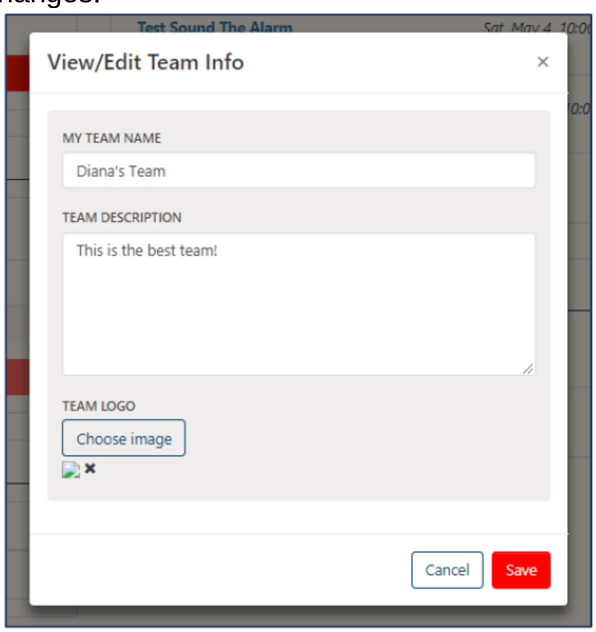
4. Click **Send.**



Editing Team Info

To edit a Team, follow these steps:

1. Click **View/Edit Team Info** under the **Leader Tools** section from the Team Leader page.
2. Enter a team names under **My Team Name**.
3. Enter a **Team Description**.
4. Click Choose Image to add a **Team Logo**.
5. Press **Save** to save changes.



Deactivating a Team

To deactivate a Team, follow these steps:

1. Click **Deactivate Team** under the Leader Tools section from the Team Leader Page.
2. Click **Confirm and Deactivate** from the popup window.

Additional Resources

Resource Library in Volunteer Connection (link): Select category/filter from left menu.

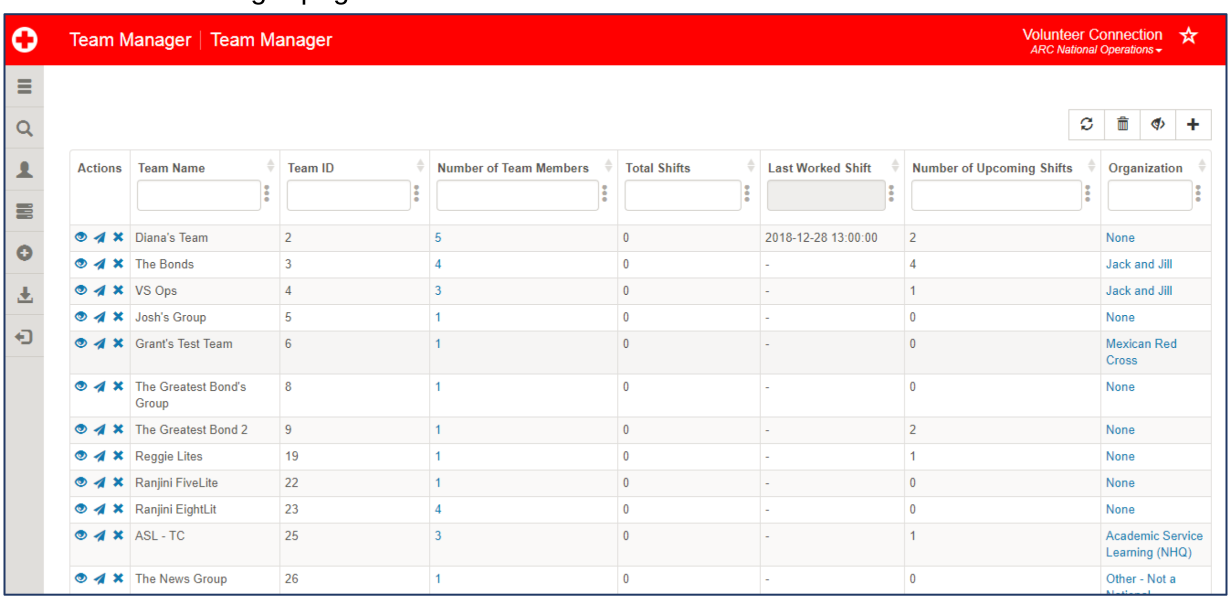
Volunteer Connection: Tip Sheet for Administrators
Team Manager Tool

The Team Manager tool allows volunteers to be listed together as a team, for the purposes of participation together on a single-day style event or shift such as a smoke alarm installation day or a golf outing fundraiser. Teams can either be created by an administrator with 'Team Administrator' access level or by a volunteer as the Team Leader. Those created by an administrator would be in support of certain partnerships while those created by an individual volunteer would be used more teams of family or friends. The level of functionality for Teams is within the Event Based Volunteer registration process and utilizes the Public Shift Tool for events.

Using the Team Manager Tool

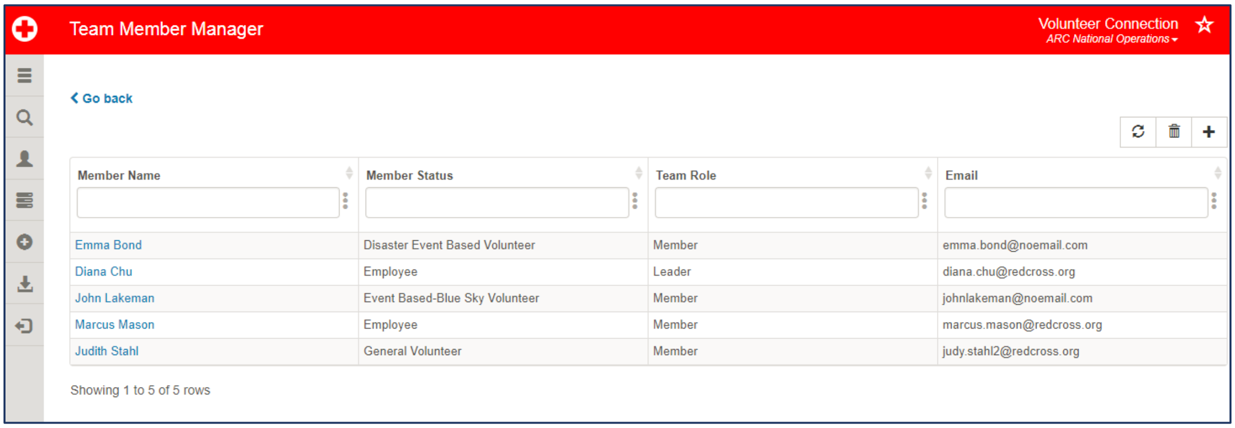
To access and utilize the Team Manager Tool, follow these steps:

1. From the **Unit Configuration** screen, click the **Team Manager** button.
2. Under the **Action** Column, you can click the eye icon to **View**, the arrow icon to **Share**, and x icon to **Archive**.
   a. **View**- will show team's page in a new tab
   b. **Share**- will pop-up the Invitation Code and Invitation Link for the team.
   c. **Archive**- will remove the team from the active list. Archived teams can still be viewed clicking the **Include Archived** button in the upper right of the Team Manager page.

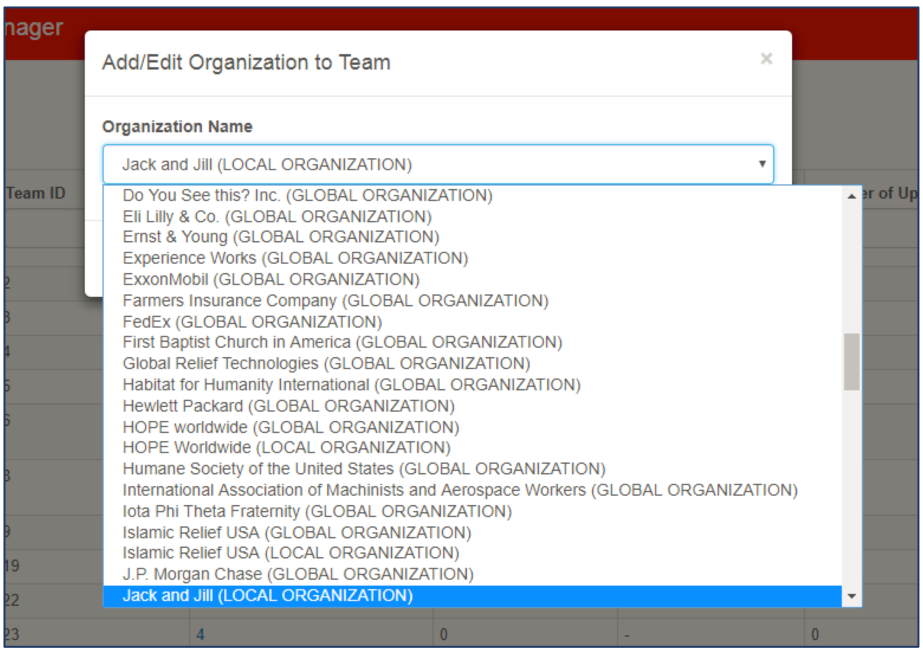


Actions	Team Name	Team ID	Number of Team Members	Total Shifts	Last Worked Shift	Number of Upcoming Shifts	Organization
	Diana's Team	2	5	0	2018-12-28 13:00:00	2	None
	The Bonds	3	4	0	-	4	Jack and Jill
	VS Ops	4	3	0	-	1	Jack and Jill
	Josh's Group	5	1	0	-	0	None
	Grant's Test Team	6	1	0	-	0	Mexican Red Cross
	The Greatest Bond's Group	8	1	0	-	0	None
	The Greatest Bond 2	9	1	0	-	2	None
	Reggie Lites	19	1	0	-	1	None
	Ranjini FiveLite	22	1	0	-	0	None
	Ranjini EightLit	23	4	0	-	0	None
	ASL - TC	25	3	0	-	1	Academic Service Learning (NHQ)
	The News Group	26	1	0	-	0	Other - Not a

3. Other columns simply display different teams' information including: **Team Name**, **Team ID**, **Total Shifts**, **Last Worked Shift**, **Number of Upcoming Shifts**.
4. Click **Number of Team Members** to display the list of profiles that are members of that team.



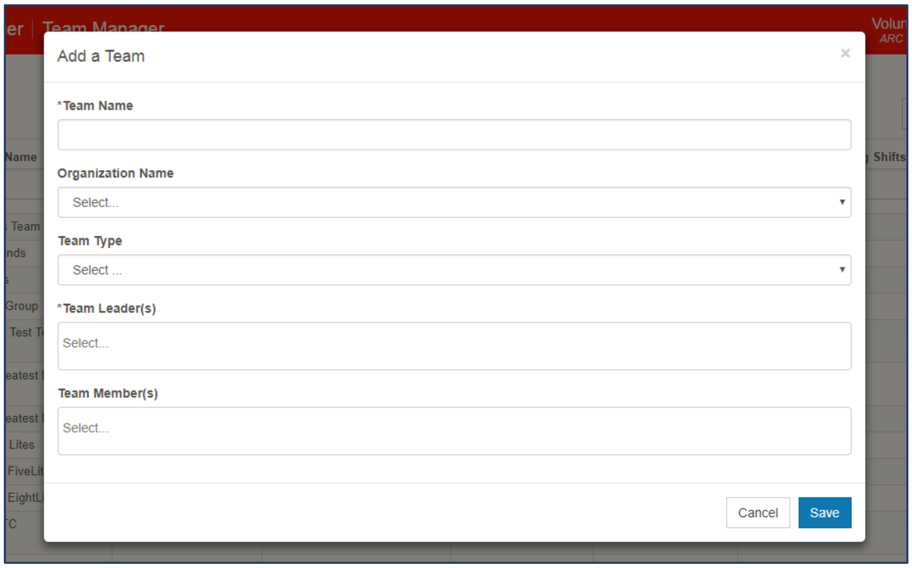
5. Click on the **Organization** link to display a pop-up with the dropdown of Organizations to select from, including both regional and national (local and global) organizations from the Region's Organization Manager.



Creating a New Team

To create a new team within the Team Manager Tool, follow these steps:

1. Click on the '**+**' button in the corner of the **Team Manager** Tool.
2. Fill out the information including: typing a **Team Name**, selecting if the team is associated with an existing **Organization**, selecting a **Team Type**, and identify who will be the **Team Leader** and optionally **Team Members**.
3. Click **Save**.



Reserve Shifts for a Specific Team

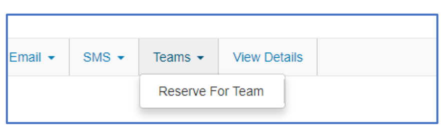
When a shift is reserved for a team, only members of that team will be able to complete registration. Even if other individuals are able to see the shift posted (on a website or if they accidently received an event URL) they will not be able to complete registration and will instead be notified by the system that they are attempting to register for a closed event.

To reserve shifts for a team, follow these steps:

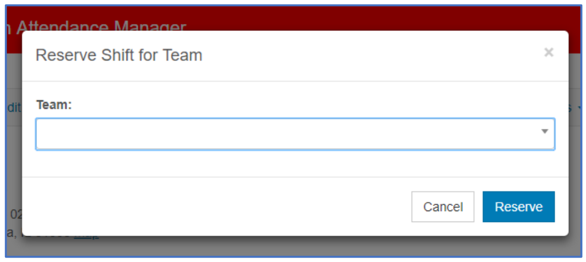
1. Navigate to the appropriate shift tool in **Shift Tool Manager**.
2. Click the **Manage** option in the shift tool.
3. Find the shift that want to reserve and click the people icon in the **Attendees** column.

Date	Time	Attendees	Minimum	Recurring	Edit	Copy	Delete	Status
Sat, Apr 18 2020	09:00 AM – 02:00 PM	1/300	0					Open
Sat, Apr 18 2020	09:00 AM – 02:00 PM	0/300	0					Open
Sat, Apr 25 2020	09:00 AM – 02:00 PM	0/300	0					Open
Sat, May 02 2020	09:00 AM – 02:00 PM	0/300	0					Open

4. Hover over the **Team** button on the top of the screen until a dropdown appears.
5. Click **Reserve For Team**.



6. Select the appropriate team from the pop-up window's dropdown menu.



7. Click the **Reserve** button.

Additional Resources

Resource Library in Volunteer Connection (link): Select category/filter from left menu.

Volunteer Connection: Tip Sheet for Team Members

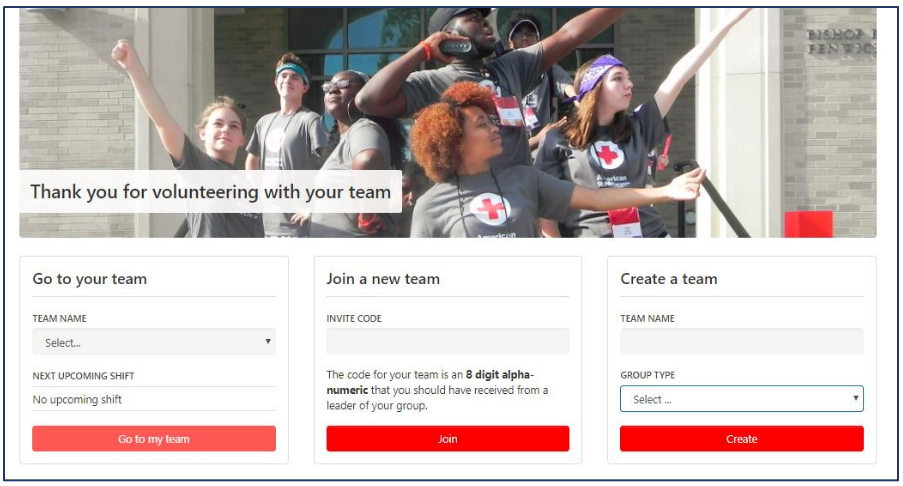
Member Profiles: Team Members

The Team Manager tool allows volunteers to be listed together as a team, for the purposes of participation together on a single-day style event or shift such as a smoke alarm installation day or a golf outing fundraiser. Teams can be created by an administrator with ‘Team Administrator’ or by a volunteer as the Team Leader. An individual can only join teams that they have been invited to. The invitation can be received either via an Invitation Link or an Invitation Code. While the Invitation Code can be used by either existing volunteer or new volunteer, the Invitation Link is the better option for connecting new volunteers to the team.

Joining a Team Via Code

To join a team with an invitation code, follow these steps:

1. From **My Profile**, under the **Engagement Information** Section, find **My Teams** and click **Go to Team Landing** to go to the **Team Landing Page**

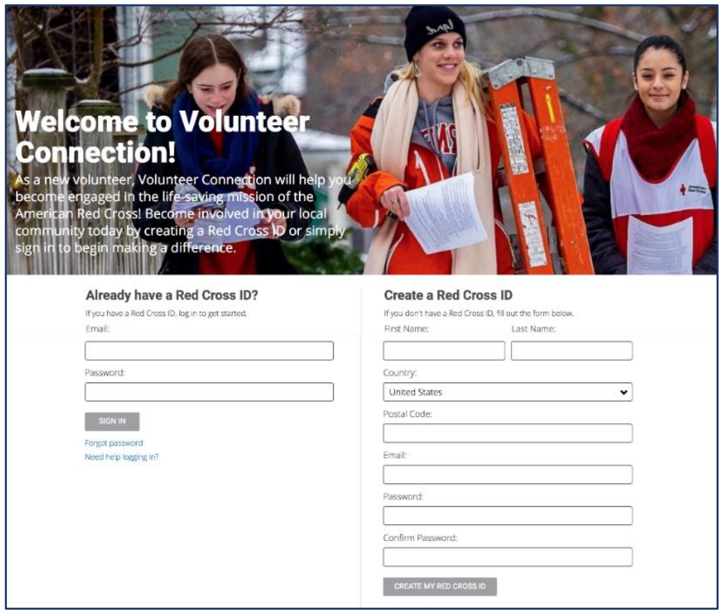


2. Enter the 8 digit alpha-numeric code into the **Join a New Team** box in the middle of the page to be taken to the Team’s page.

Joining a Team Via Invitation Link

To join a team with an invitation code, follow these steps:

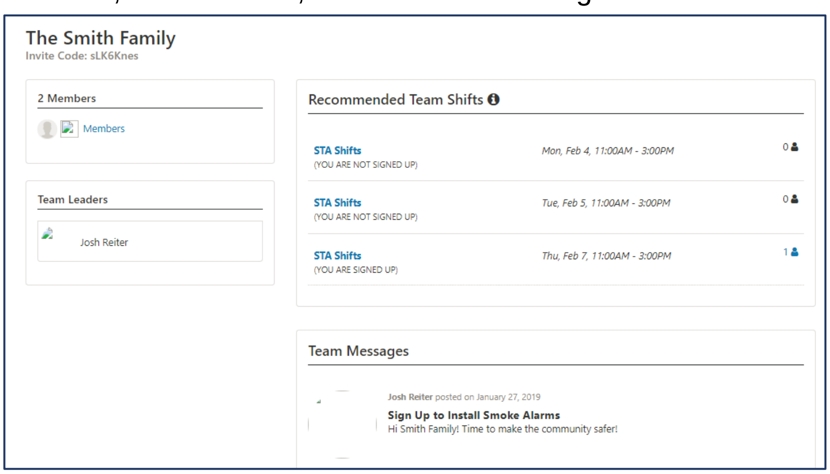
1. From the email with the invitation, click on the link.
2. Use the **Sign In** button if you already have a Volunteer Connection profile, or click **Get Started** to create a Red Cross ID and Volunteer Profile if you are a new volunteer.



3. After either, when you reach the Volunteer Connection home page you will see a notification that you have joined the team.
4. Click **Continue** to be taken to the Team's page.

Team Page

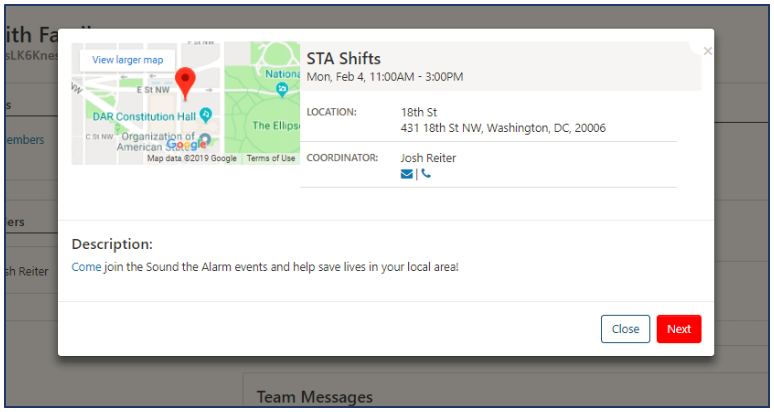
From the Team's page you can see message in the Team Messages section as well as a list of other team members, team leaders, and team shifts to register for.



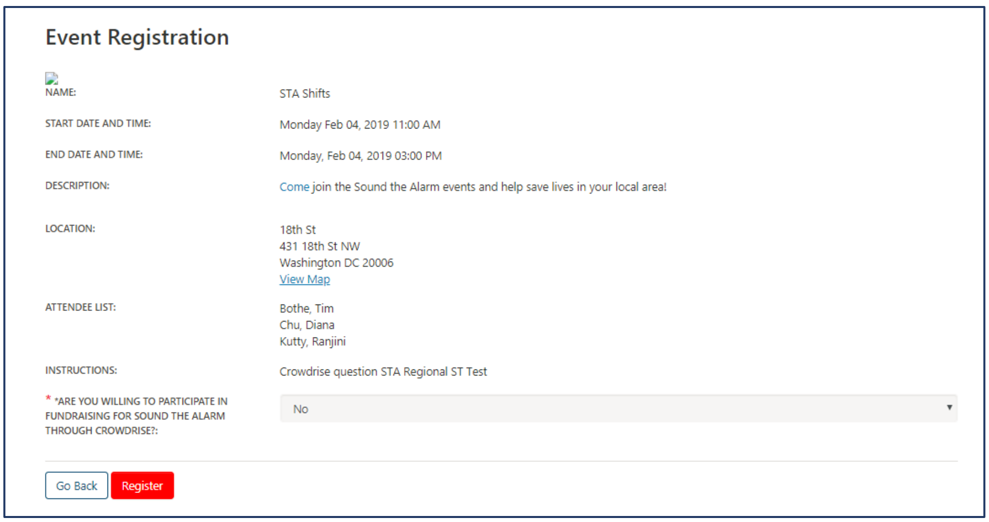
Register for Recommended Shifts

To register for shifts from a Team page, follow these steps:

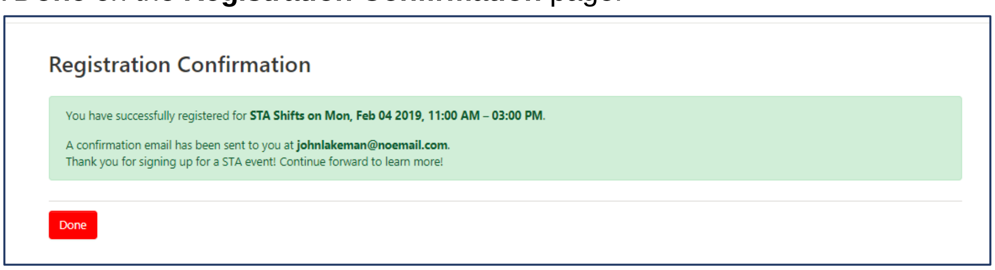
1. From the Team's Page, click a desired shift's name from the **Recommended Team Shifts** section.



2. The details of the shift will pop-up, click **Next**.
3. From the full **Event Registration Details** page, press **Register**.



4. Click **Done** on the **Registration Confirmation** page.



Additional Resources

Resource Library in Volunteer Connection (link): Select category/filter from left menu.