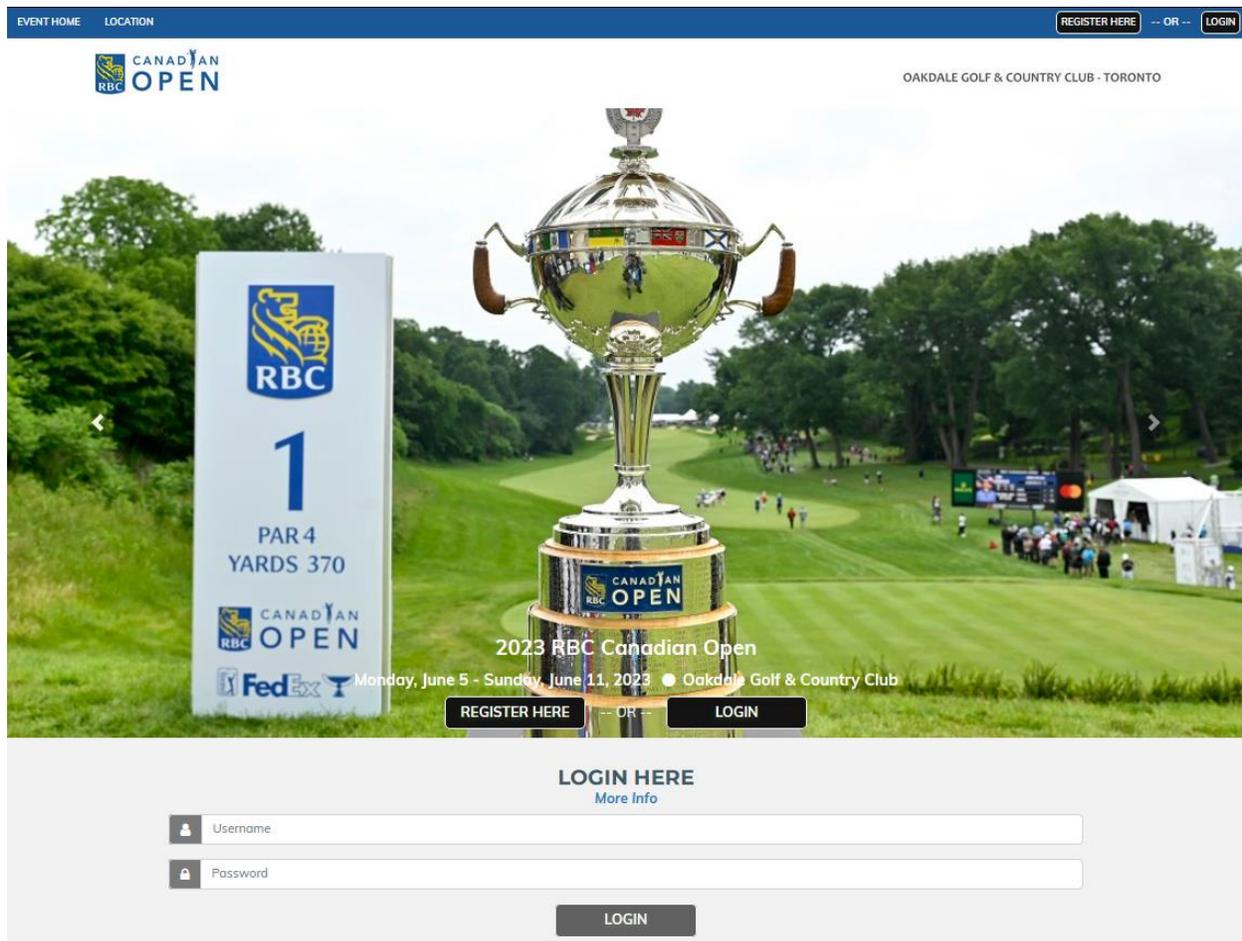


RBC Canadian Open

Trust Event - Volunteer Chair Tutorial

A) Accessing the Volunteer Chair Portal

1. Visit <https://trusteventsolutions.com/event/44/home> or you may access through the tournament website
2. This will open the event home page where you originally registered from. This time however you will login.
3. On the top right and/or on in the middle of the homepage you will see the **LOGIN button**
4. Enter your Username and Password and login.



The screenshot shows the event website for the 2023 RBC Canadian Open. At the top, there is a navigation bar with "EVENT HOME" and "LOCATION" on the left, and "REGISTER HERE", "-- OR --", and "LOGIN" on the right. Below the navigation bar, the event logo "RBC CANADIAN OPEN" is on the left, and the location "OAKDALE GOLF & COUNTRY CLUB - TORONTO" is on the right. The main content area features a large image of a golf course with a prominent silver trophy in the foreground. To the left of the trophy is a sign for the 1st hole, "PAR 4 YARDS 370". Below the image, the text reads "2023 RBC Canadian Open" and "Monday, June 5 - Sunday, June 11, 2023 • Oakdale Golf & Country Club". There are "REGISTER HERE", "-- OR --", and "LOGIN" buttons. Below this is a "LOGIN HERE" section with a "More Info" link. The login form consists of two input fields: "Username" and "Password", both with icons of a person and a lock respectively. A "LOGIN" button is positioned below the password field.

5. Upon a successful login you will arrive at the Volunteer Welcome Screen. This is the same for all volunteers. showing assigned committees and shifts.
6. In your list of Assigned Committees, you will see a button called **MANAGE**. This only appears for Chairs.
7. Once you click the MANAGE button you will see your Chair Dashboard indicated by 4 boxes. This is where you administer your committee.

Menu Items

[Email Functions/Bulletin Board](#)

[Shift Assignment](#)

[Reports](#)

[Statistics](#)

Announcers COMMITTEE

Email Functions / Bulletin Board

- [Email Entire Committee](#)
- [Email Selected Volunteers](#)
- [Email by Specific Shifts](#)
- [Email by Specific Dates](#)
- [Email to Not assigned to shifts](#)
- [Email History](#)
- [Bulletin Board](#)

Shift Assignment

- [Manage Shift Assignments](#)
 - [Shift Assignment Summary](#)
 - [Add Special Instructions to Shift](#)
- [Hide Shift Schedules from Public View](#)

Reports

- [View Shift Assignments](#)
- [Selected this committee as a preference](#)
- [Shift Preferences](#)
- [Shift Breakdown](#)
- [Notes on Shift Schedule](#)
- [Private Chair Notes](#)

Statistics

- [Volunteers Assigned to Committee 3/3](#)
- [Volunteers Assigned to Shifts: 1](#)
- [Volunteers Not Assigned to Shifts 2](#)

 [SEND TO PRINTER](#)

 [EXPORT TO EXCEL](#)

 [PRINT ALL DATA SHEETS](#)

 [PRINT ALL SCHEDULES](#)

8. This dashboard above is followed by a list of your committee members. Each volunteer has many unique functions listed beneath their name. Some examples are:
- Manage Shifts:** Manage Shift Assignments per Volunteer
 - View Data Sheet:** Full Data per Volunteer

Show unconfirmed volunteers: Yes No

NAME	PHONE		DATE ASSIGNED	SHIFTS ASSIGNED
Scott Becker <ul style="list-style-type: none"> • Manage Shifts • View Data Sheet • View Shift Schedule 1 • Notes on Shift Schedule • Private Chair Notes • Hours Worked 0 	5612134344		Feb 21, 2022	1
Scotty Becker <ul style="list-style-type: none"> • Manage Shifts • View Data Sheet • No shifts assigned • Notes on Shift Schedule • Private Chair Notes • Hours Worked 0 	8004468884		Nov 9, 2021	0
Henry Blick <ul style="list-style-type: none"> • Manage Shifts • View Data Sheet • No shifts assigned • Notes on Shift Schedule • Private Chair Notes • Hours Worked 0 	617-222-2222		Nov 9, 2021	0

B) Assigning Volunteers for Shifts

Two (2) Methods to Assigning Volunteers to Shifts

Assign the volunteer “By Shift”

Function: Assign and un-assign multiple volunteers to shifts **in bulk**.

Best Practice: Use this function when there are no shifts assigned yet and you are just starting to assign volunteers to shifts.

Assign the volunteer “By Volunteer”

Function: Assign or change shifts for an individual volunteer.

Best Practice: Use this function when an individual volunteer requires a change to their assigned shifts.

Extended Instructions:

Option #1: Assign Shifts “By Shift”

1. From your Dashboard, under the SHIFT ASSIGNMENT BOX, click on MANAGE SHIFT ASSIGNMENTS. (Note: if you do not see this option this means that you do not have these permissions)
2. At the Top of the screen, you will see a list of all shifts designated to your committee. They are ordered by day.
3. Click directly on a particular shift. It will highlight. The two boxes below will then populate with volunteers.
4. Those volunteers that appear above the dotted line are those volunteers who said they were available for that shift time.
5. Highlight the name (or names using your Shift or Ctrl keys) you want to add to the shift. Click the >> button.
6. If you want to assign multiple volunteers with one click, keep pressed your CTRL button and use your mouse to click on the volunteers you want to select. They should all highlight. Then click >> one time.
7. Or to assign everyone in the list of volunteers to a shift, you click on the first name and then click on the last name while holding the SHIFT key down and this will highlight the entire list. Then click the >> button once.
8. These selections automatically save so you don't need to click a SUBMIT button.
9. To send emails to those volunteers who have been added or removed from a shift simply click the EMAIL MODIFIED COMMITTEE MEMBERS link at the top. THIS WILL ONLY SEND TO THOSE YOU HAVE ADDED OR REMOVED.

- My Invoice
 - My Form Of Payment
 - Volunteer Guide
- Registration Summary
 - Change My User Name & Password
 - Logout

Shifts for Announcers

- [E-mail Modified Committee Members](#)
- [View Current Shift Assignments](#)
- [Return to Chair Dashboard](#)

Order by: Date (Alpha by shift name) Date (Ordered by shift time) SHIFT NAME

Please click on a shift below to get started.

	NAME	DAY	TIME	LOCATION
May 16 2022	Morning	Monday May 16 2022	07:00 AM - 09:30 AM	
May 17 2022	Afternoon	Tuesday May 17 2022	01:00 PM - 08:00 PM	
May 17 2022	Morning	Tuesday May 17 2022	06:30 AM - 12:00 PM	
May 18 2022	Afternoon	Wednesday May 18 2022	12:00 AM - 07:30 PM	
May 18 2022	Morning	Wednesday May 18 2022	08:00 AM - 02:00 PM	
May 19 2022	Morning	Thursday May 19 2022	07:00 AM - 01:00 PM	

SHIFT **Afternoon** Tuesday May 17 2022 01:00 PM - 08:00 PM

Order By: Last Name Reg Date

Unassigned Volunteers

Shaded names are assigned to a conflicting shift.

- Scott Becker
- Henry Blick

Assigned Volunteers 1 / No Max

- Scotty Becker

« Unassign

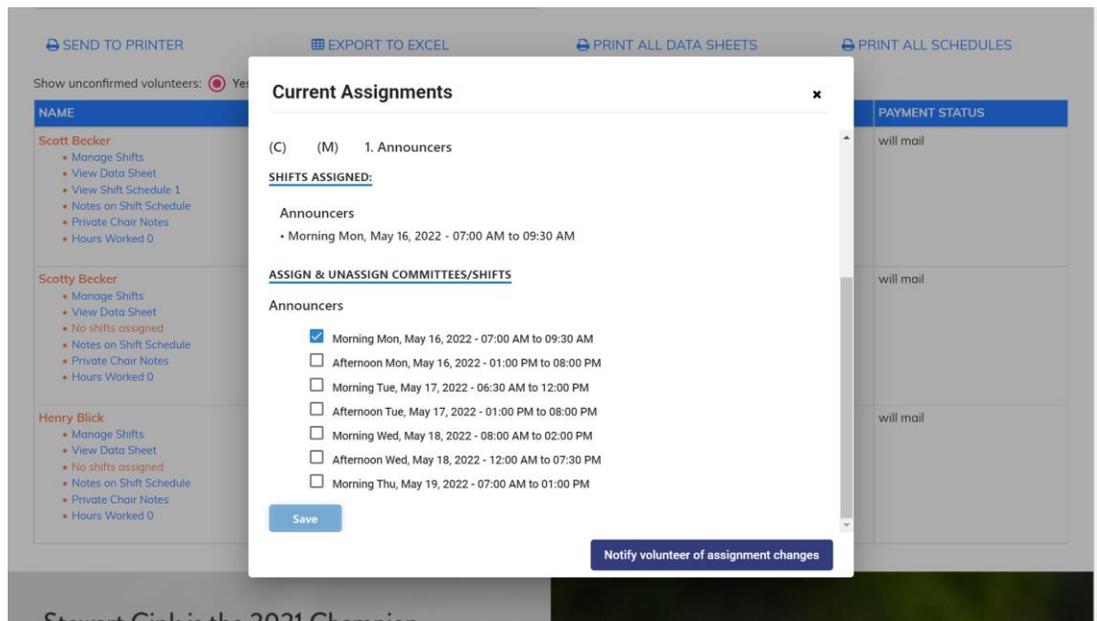
Assign »

Volunteer Detail

Name: Scott Becker
 Vol Type: 2021 Volunteer
 Organization: TES
 Email: scott@trustevent.com
 Telephone: 5612134344
 Payment Status: will mail
 Uniform Pick Up: NOT Picked Up

Option #2: Assign Shifts “by Volunteer”

1. Upon logging on as a Chair, and clicking the MANAGE button, you will arrive at your volunteer dashboard. Beneath this dashboard is a list of volunteers assigned to your committee.
2. Beneath each volunteer’s name in the volunteer list, you will see MANAGE SHIFTS. Upon clicking this you will see a pop up will appear containing the volunteer’s assignments, and a list of shifts available.
3. Select the Shifts you would like to assign/un-assign this volunteer to/from.
4. Click the SAVE button
5. You will be asked if you would an email to be sent to your volunteer with the update.



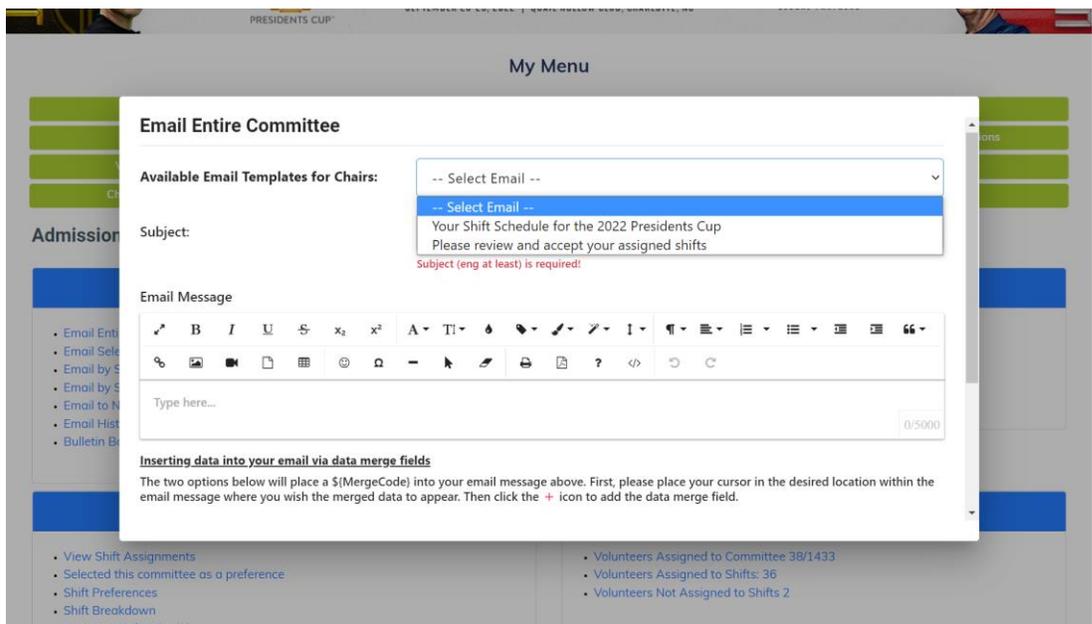
C) Sending Emails/Bulletin Board

Within the EMAIL FUNCTIONS box, you will see the following options

- Send emails to All Committee members
- Send emails to Select Email Members
- Send emails by Specific Shifts
- Send emails by Specific Dates
- Send emails to a single committee member

Regardless of which option you choose, you will see the following pop-up. At the top of the pop-up, you can choose from 2 email subjects listed below or simply type your own email and subject.

- [Send Shift Schedule](#)
- [Send Shift Schedule with the Approve Button](#)



D)

Reports

There are two distinct areas from which to extract your data. You can manage your committee via your Dashboard and/or via individual reporting functions.

1. Dashboard Reporting

- **View Shift Assignments:** Here you can view all your current shift assignments broken down by day and shift. You can also use a series of filters.
- **Selected this committee as a preference:** A list of your volunteers with their initial committee preferences from registration.
- **Shift Preferences:** See a grid format listing shift preferences.
- **Shift Breakdown (DOT Report):** See a grid format listing shift preferences.
- **Notes on Shift Schedule:** Report of any notes you have added to schedules.
- **Private Chair Notes:** Report format
- **Custom Reporting (new):** Chairs can now create and have their own custom reports.

2. Individual Volunteer Reporting

Beneath each volunteer's name there is a series of functions available to you:

- **Manage Shifts:** Assign and Unassign Shifts.
- **View Data Sheet:** View the complete registration information of a volunteer.
- **View Shift Schedule:** View and easily email a volunteer's shift schedule.
- **Notes on Shift Schedule:** Any text you add here will show up on this volunteer's shift schedule as a footer.
- **Private Chair Notes:** These are notes on a volunteer that only you can see.
- **Hours Worked:** Here is where you can track your volunteer's hours worked.

3. Bulletin Board

1. Under the EMAIL FUNCTIONS/BULLETIN BOARD section of your Dashboard, click on BULLETIN BOARD.
2. If you are a Chair of multiple committees, please first select the committee of choice from the drop-down menu
3. Click on ADD MESSAGE and follow the prompts to add the message

E) Tracking Hours Worked

1. Once you log in as a Chair you will see a list of your volunteers.
2. Beneath each volunteer's name is an **HOURS WORKED** link. Please click on it to arrive at the following screen

My Menu

Contact Info	Reg Questions	My Committee Assignment
My Invoice	My Form Of Payment	Volunteer Guide
Registration Summary	Change My User Name & Password	Logout

Hours worked by Scott Becker Announcers

- [Go To Next Volunteer](#)
- [Return to Chair Dashboard](#)

Add Record Manually

Shifts Assigned

Check box for shifts worked

Morning (Monday, May 16, 2022 at 7:00 am - 9:30 am)

Stewart Cink is the 2021 Champion

The 47-year old Cink finished at 19-under 265 at Harbour Town, four better than Emiliano Grillo and Harold Varner III. Cink hugged his son and caddie, Reagan, after his closing par on the 18th green. He, wife Lisa and their other son, Connor, all had their arms around each other to celebrate. "I don't even know if I have the words," Stewart Cink said.



3. Click the check box next to a shift and click SAVE to mark that shift as worked
4. You can also click on [add record](#) to add manual hours worked not associated with a shift