



VRMS Coordinator and Supervisor Overview

Topic Guide

Access VRMS, Navigation, Features, and Roles

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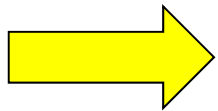
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Coordinator Guide Split into Topic Guides

- New, shorter VRMS Coordinator Topic Guides
- Watch them all, or choose one to focus on a topic
- Links are offered at the start and end of each Topic Guide



To continue with this guide, click **Next Slide**



To open a different guide, pick a topic and click **Submit**

1. VRMS Supervisor Role
2. VRMS Coordinator - Create and Manage Opportunities
3. VRMS Coordinator - Manage Applications and Extend Offers
4. VRMS Coordinator and Supervisor FAQs and Support

Content in this Guide

- Access VRMS
- Coordinator and Supervisor Views
- How Coordinators and Supervisors use VRMS
- Navigation and Features
- Search for Volunteers

Accessing VRMS

VRMS Welcome Page

The screenshot shows the VRMS Welcome Page with a blue header and navigation menu. The header includes the PMI logo and the text "Volunteer Relationship Management System". The navigation menu has links for "Home", "Volunteer", and "Profile". The main content area is divided into three columns:

- Find an Opportunity:** A section with a heading and a paragraph explaining how to search for opportunities. A callout box points to the "Find an Opportunity" link.
- Update Your Volunteer Profile:** A section with a heading and a paragraph explaining how to review and update your profile. A callout box points to the "View and Update Volunteer Profile" link.
- Your Applications in Progress:** A section with a heading and a list of current applications. A callout box points to the application details.

Callout boxes highlight the following actions:

- Click to switch to the Coordinator or Supervisor View** (pointing to the top navigation menu)
- Search Opportunities** (pointing to the "Find an Opportunity" link)
- Create and Maintain Service History** (pointing to the "View and Update Volunteer Profile" link)
- View the Status of Your Applications** (pointing to the application details)



Volunteer Relationship Management System

Welcome, [User Name] [VRMS Guides](#) [Coordinator View](#) [Supervisor View](#) [PMI.org](#) [VRMS Feedback](#) [Log Out](#)

[Home](#) [Volunteer](#) [Profile](#)

Click to switch to the Coordinator or Supervisor View

Find an Opportunity

When you select the Find an Opportunity link below, you can search for chapter, community and global volunteer opportunities which are open for application. Your search results will allow you to review the opportunity details to determine the requirements and skills required to apply for the opportunity.

[Find an Opportunity](#)

Search Opportunities

Update Your Volunteer Profile

When you select the View and Update Volunteer Profile link below, you can review your profile

Create and Maintain Service History

awards and relationships you received. Volunteer Coordinators view your Profile and Service History when they consider your application and eligibility for a new volunteer opportunity.

[View and Update Volunteer Profile](#)

Your Applications in Progress

Your Current Applications:

Name: Test the Rolling Opportunity
Status: Submitted
Submit Date: 2015-11-08

View the Status of Your Applications



Views: Volunteer, Coordinator, and Supervisor

Access the Coordinator Views

The Coordinator and Supervisor roles are associated with your PMI username and password. The background color is blue in the Volunteer view, and purple in the Coordinator and Supervisor views.

Volunteer View



Coordinator View



Access Coordinator and Supervisor Views

The screenshot shows the 'Volunteer View' page. The top navigation bar is blue and contains the text 'Volunteer View' in a yellow box, 'Welcome, [user]', 'VRMS Guides', 'Coordinator View' (highlighted with a red box), 'Supervisor View' (highlighted with a red box), 'PMI.org', 'VRMS Feedback', and 'Log Out'. Below the navigation bar is a dark blue bar with 'Home', 'Volunteer', and 'Profile' links. The main content area has a white background with three primary actions: 'Find an Opportunity', 'Update Your Volunteer Profile', and 'Your Applications in Progress'.

The screenshot shows the 'Coordinator View' page. The top navigation bar is purple and contains 'Coordinator View' in a yellow box, 'Welcome, [user]', 'VRMS Guides', 'Volunteer View' (highlighted with a red box), 'Supervisor View' (highlighted with a red box), 'PMI.org', 'VRMS Feedback', and 'Log Out'. Below the navigation bar is a dark blue bar with 'Manage Opportunities' and 'Manage Applications' links. The main content area has a white background with a horizontal menu of links: 'My Opportunities', 'Archived Opportunities', 'Templates', 'Create Opportunity', 'Edit Opportunity', 'View Opportunity', 'Preview Application', and 'Back to List'. The page title is 'List Opportunities', and the first line of text is 'These are the 8 most recently updated Opportunities', which is highlighted with a red box.

The screenshot shows the 'Supervisor View' page. The top navigation bar is purple and contains 'Supervisor View' in a yellow box, 'Welcome, [user]', 'VRMS Guides', 'Volunteer View' (highlighted with a red box), 'Supervisor View' (highlighted with a red box), 'PMI.org', 'VRMS Feedback', and 'Log Out'. Below the navigation bar is a dark blue bar with 'Manage Opportunities', 'Manage Applications', and 'Supervisor Functions' links. The main content area has a white background with a horizontal menu of links: 'Find Opportunities', 'My Opportunities', 'Archived Opportunities', 'Templates', 'Create Opportunity', 'Edit Opportunity', 'View Opportunity', 'Preview Application', and 'Back to List'. The page title is 'List Opportunities', and the first line of text is 'These are the 1 most recently updated Opportunities', which is highlighted with a red box.

Coordinator & Supervisor Features

How will Coordinators use VRMS?

- Create a new opportunity from a blank form or a template.
- Edit an opportunity at any time.
- Search for, and assign reviewers to evaluate applications.
- Open the opportunity to applications.
- Review the volunteer's application, VRMS profile, service history, and resume.
- Send emails to the volunteer from within VRMS.
- Extend an offer to a volunteer.

How will Coordinators use VRMS? (continued)

- Search for volunteers.
- Mark a Static Opportunity fulfilled or close it.
- Delete a Static Opportunity
- Activate or Deactivate a Rolling Opportunity

How will Supervisors use VRMS?

- Perform all the tasks that Coordinators can perform.
- Perform Administrator tasks for the Coordinators and opportunities in the assigned chapters.
 - Grant/remove Coordinator access to a Chapter
 - Grant/Remove Supervisor access to a Chapter
 - Reassign an opportunity to another Coordinator
 - View all opportunities and applications for the assigned chapters
 - Use Find Opportunities to Search opportunities

Coordinator View Navigation

Underlined active link, where you are now.

Inactive, becomes active if you edit an opportunity.

Manage Opportunities | Manage Applications

My Opportunities | Archived Opportunities | Templates | Create Opportunity | Edit Opportunity | View Opportunity | Preview Application | Back to List

List Opportunities

These are the 8 most recently updated Opportunities

ID	Name	Type	Status	Copy	Edit	Action	View	Archive
6246	Static Opportunity 105	Static	Fulfilled	Copy			View	Archive
6245	Static Opportunity 100	Static	Posted	Copy	Edit	Close	View	
6247	Rolling Opportunity Two	Rolling	Posted	Copy	Edit	Deactivate	View	
6248	Rolling Opportunity Three	Rolling	Draft	Copy	Edit	Deactivate	View	

Tan underline shows briefly when you hover the mouse. Click to access the link.

VRMS Coordinator Features

Create, edit, or view volunteer opportunities.

Review applications, extend opportunities to applicants.

Manage Opportunities

Manage Applications

Active Opportunities

Application Details

Archived Applications

Review Application

Service History

Find Volunteers

Back to List

Submitted applications for the opportunity:

(Static) Membership Drive Chair

Note: Only unarchived applications for the opportunity are shown, refer to the Archived Applications tab for any additional applications.

Export all applications ⓘ

Export accepted applications ⓘ

Opportunities and applications display in tables.

App. ID	User Profile	Resume	First Name	Last Name	Email Address	Application Status	Standards Interest Category	Status Date	Email: Extend Offer	Do Not End Offer	Email: Contact Applicant	SVC History Start - End Dates
35048	View		Tester	88	Tester888@PMI.org	Submitted	none	2015-12-01	Extend	Decline	Contact	
35047	View		Tester	99	Tester999@PMI.org	Submitted	none	2015-12-01	Extend	Decline	Contact	

First < 1 2 3 4 5 > Last

Mark this Opportunity as 'Fulfilled'

Search for Volunteers

Manage Opportunities

Manage Applications

Active Opportunities

Application Details

Archived Applications

Review Application

Service History

Find Volunteers

Back to List

Narrow your results with Areas of Interest

- Academic Outreach
- Certification
- Community Outreach

- Advisor
- Chapter Development
- Content Contributor

- Exam Developer
- Finance
- Language Transl...

- Mentor
- Pilot Participant
- Professional Development/Education
- School -Student Mentor/Judge

- Analyst
- Business Development
- Communications

- e-Learning
- Technology
- Training

- Online Community Mo...
- Policy/Governance/Et...
- Requirements Gather...

- Seminars and Events
- Sponsorship
- Volunteer Coordination

Volunteer Search Tips:

- Use the term or phrase search option to search for a term or a phrase that appears in a volunteer's profile or in an opportunity name, description, deliverables or duties, for example.
- Use ? to perform a single-character wildcard search.
- Use * to perform a multiple-character wildcard search. You can use * before or after a search term. You cannot use * term *.
- Use the Boolean operators: NOT, AND, OR, + or - to exclude or include search results. NOT, AND and OR must be uppercase.
- Use + to require that the term after the + exists in the volunteer's profile or in the opportunity name, description, deliverables or duties.
- Use - to exclude search results that contain the term after the - in the volunteer's profile or in the

Filter by years in project management, average budget, and if the volunteer is a researcher or trainer

Search by one or multiple Areas of Interest

Type a term like a name,

ID	First Name	Last Name	Email	Country
				Nigeria
Community Affiliations: (none)				
				United States
Community Affiliations: Southern New England Chapter				
				United States
Community Affiliations: (none)				
				Russian Federation
Community Affiliations: Silicon Valley, CA Chapter Moscow, Russia Chapter				

Language Tips for Searching

1. VRMS search matches language to language, it will not translate from English to other languages. For example, if you search in Spanish, your search will display opportunities written in Spanish.
2. VRMS page field names and help text are not translated.
3. Opportunity descriptions, details, and duties will display in the language in which they are written by the VRMS Coordinator.
4. You have two options for searching characters with accent marks:
 - Use the accent to see only accented characters in search results.
 - Remove the accent to see both accented and unaccented characters in search results.

Supervisor View Navigation

- Supervisor Functions displays on both tabs
- Search for a volunteer and assign role

Manage Opportunities **Manage Applications** **Supervisor Functions**

Assign Security Roles

Assign VRMS Security Roles and Affiliations

Search by one or more fields below
To ensure you select the right person, contact the volunteer and request their Userid or PMI ID.
Use this value to search for the volunteer, then select the role you wish to assign. Assign the Chapter in the next screen. Supervisors can only assign roles for the chapters in their given area.

Username:

PMI ID:

ID	First Name	Last Name	Email	GOC Coordinator	Chapter Coordinator	GOC Supervisor	Chapter Supervisor
4354686	Tester	99	Tester999@PMI.org	<input type="checkbox"/>	View/Edit	<input type="checkbox"/>	View/Edit

Thank you!

To open another Topic Guide, pick a topic and click **Submit**

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