



VRMS Coordinator User Guide

How to manage volunteer opportunities and applications

PMI Technical Communication Team

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User Guide Topics

1. How will coordinators use VRMS?
2. Coordinator Features
3. Manage Opportunities
4. Manage Applications
5. Volunteer Search
6. Legal Agreements for PMI GOC-based opportunities
7. Support Contacts

GOAL:

This user guide will help you use VRMS to create volunteer opportunities, open applications to volunteers, review applications, and extend opportunities to volunteers.

Which specific VRMS coordinator features would you like to learn more about? Pick a feature and click Submit to continue.

- a. Start from the beginning and show me all the features.
- b. Coordinator Navigation and Feature Summary
- c. How to Manage Opportunities
- d. How to Manage Applications
- e. How to Contact Support
- f. I'm a volunteer, please show my VRMS volunteer features.

How will Coordinators use VRMS?

1. Create a new opportunity from a blank form or a template.
2. Search for and assign reviewers to evaluate applications.
3. Open the opportunity to applications.
4. Review volunteer profile, service history, application.
5. Extend opportunities to volunteers.
6. Search for volunteers within assigned region, chapter, or community.

How to Access VRMS

PMI
Project Management Institute

Home About Join Contact Help My Profile **Login / Register**

SEARCH

myPMI Certifications **Membership** Learning Events Business & Government PMBOK® Guide & Standards Store

Home > Membership > Find Volunteer Opportunities

Find Volunteer Opportunities

Link to VRMS

Get involved. Make a difference. Be a volunteer.

Volunteering with us is easier than ever!

Volunteer Relationship Management System (VRMS)

How to Access VRMS (con't)

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myPMI Certifications **Membership** Learning Events Business & Government PMBOK® Guide & Standards Store

MEMBERSHIP POPULAR BENEFITS GET INVOLVED
Membership Benefits PMI Local Chapters **Volunteer**

How to Volunteer

Our Volunteer Relationship Management System (VRMS) makes it easy to search for volunteer opportunities throughout the world.

To get started, log in or register and visit the VRMS to find volunteer opportunities that interest you.

Volunteer Relationship Management System (VRMS)

[VRMS Guide »](#) [VRMS Coordinator Guide »](#)

Link to VRMS

Link to Volunteer User Guide

Link to Coordinator User Guide

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VRMS Welcome Page

The screenshot shows the VRMS Welcome Page. At the top left is the PMI logo with the text "Volunteer Relationship Management System". To the right of the logo is a navigation bar with links: "Welcome, [redacted]", "VRMS Guides", "Coordinator View", "PMI.org", "VRMS Feedback", and "Log Out". Below this is a dark blue navigation bar with "Home", "Volunteer", and "Profile" links. The main content area is divided into three columns:

- Find an Opportunity:** Contains a paragraph explaining how to search for opportunities and a link "Find an Opportunity". A yellow callout box labeled "Search Opportunities" points to this link.
- Update Your Volunteer Profile:** Contains a paragraph explaining how to update profile information and a link "View and Update Volunteer Profile". A yellow callout box labeled "Create and Maintain Service History" points to this link.
- Your Applications in Progress:** Contains a section "Your Current Applications:" with two entries:
 - Name: OpportunityName [redacted]
Status: Do Not Extend Offer
Submit Date: 2013-03-15
 - Name: TestOpportunityName [redacted]
Status: Submitted
Submit Date: 2013-03-15A yellow callout box labeled "View the Status of Your Applications" points to this section.

Section 1: Coordinator Features

Access VRMS Coordinator View

The coordinator role is associated with your PMI registered username and password. Screen color indicates coordinator features.

The image displays two screenshots of the PMI Volunteer Relationship Management System (VRMS) interface. The top screenshot shows the 'Coordinator View' with a blue header and navigation menu. The 'Coordinator View' link is highlighted with a red box. The bottom screenshot shows the 'Volunteer View' with a purple header and navigation menu. The 'Volunteer View' link is also highlighted with a red box. A yellow callout box with a pointer indicates that clicking on the highlighted link toggles between roles. The navigation menu in the bottom screenshot includes 'Manage Opportunities' and 'Manage Applications'.

Click to toggle between roles.

Navigation Tips

Underlined active link, where you are now.

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

Inactive, becomes active if you edit an opportunity.

Manage Opportunities | Manage Applications

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

List Opportunities

These are the 4 most recently updated Opportunities

ID	Name	Status	Copy	Edit	Delete	View
3601	Test 2	Posted	Copy	<u>Edit</u>	Delete	View
3537	Test 1	Posted	Copy	Edit	Delete	View
3602	Meeting Facilitator	Posted	Copy	Edit	Delete	View
3603	Bookstore Assistant	Posted	Copy	Edit	Delete	View

First < **1** 2 3 4 5 > Last

Create Blank Opportunity

Volunteer Coordinator Features

Create, edit, or view volunteer opportunities.

Review applications, extend opportunities to applicants.

Manage Opportunities

Manage Applications

Active Opportunities

Application Details

Review Application

Service History

Find Volunteers

Back To List

Submitted applications for the opportunity:

Chapter Member Advisory Group (CMAG)

Export all applications ⓘ

Export accepted applications ⓘ

Opportunities and applications display in tables.

App. ID	First Name	Last Name	Email Address	Application Status	Standards Interest Category	Status Date	Extend	View	Resume	App.
12890			@pmi.org	Offer Not Extended	none	2013-09-26	Extend	View		View
12881			@pmi.o	Offer Not Extended	none	2013-09-26	Extend	View		View

Search for Volunteers

Active Opportunities | Application Details | Review Application | Service History | **Find Volunteers** | Back To List

Narrow your results with Areas of Interest

- Academic Outreach
- Certification
- Editor
- Facilitator - Live Learning
- Information Technology
- Marketing
- Online Community Moderator
- Policy/Governance/Ethics
- Project Management
- Quality Management
- Research
- Technical Writing
- Training
- Writing
- Advisor
- Chapter Development
- Community Outreach
- Evaluator
- Facilitator - Online Content
- Indexing
- Reviewer
- Social Media
- Standards
- Analyst
- Communicative
- Content Contributor
- Exam Development
- Finance
- Language Training
- Mentor
- Pilot Participant
- Professional Development
- School -Student
- Speaker
- Tester

Search by one or multiple Areas of Interest

Type a term like a name, skill set, or description to search

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 opportunity name, description, deliverables or duties.

NOTE: Chapter coordinators can only search for volunteers within their designated chapters or communities.

Search tips

Narrow your results with search terms

ID	First Name	Last Name	Email	Country	Current Opportunity Count
----	------------	-----------	-------	---------	---------------------------

Search for

Community Affiliations: Learning Education and Development (LEAD) Community of Practice, Organizational Project Management Community of Practice, Project Risk Management Community of Practice, Leadership in PM Community of Practice, Project Management Quality Community of Practice, Program Management Office Community of Practice, Ethics in Project Management Community of Practice, Agile Community of Practice, Earned Value Management Community of Practice, Ottawa Valley Chapter

Language Tips for Volunteer and Opportunity Search

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 volunteer 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.

Section 2: Manage Opportunities

How to Manage Opportunities

Manage Opportunities | Manage Applications

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

List Opportunities

These are the 4 most recent opportunities.

ID	Title	Status	View
3601	Test 1	Posted	View
3537	Test 1	Posted	Copy Edit Delete View
3602	Meeting Facilitator	Posted	Copy Edit Delete View
3603	Bookstore Assistant	Posted	Copy Edit Delete View

< 1 2 3 4 5 > Last

Create Blank Opportunity

Create new opportunity using a template.

View, edit, copy links.

Copy Edit Delete View

Create new opportunity.



Only the coordinator who created an opportunity, or a VRMS administrator at PMI GOC, can edit that opportunity.

Opportunity Templates

Templates based on Role Delineation Surveys. VRMS Administrators at [redacted] creates for Chapters, Communities.

List of opportunity templates.

Create a new opportunity from a template, edit details.

View templates to see if they meet your needs.

The screenshot shows a web interface for managing opportunity templates. At the top, there are navigation tabs: 'Manage Communities', 'Manage Applications', 'My Opportunities', 'Templates', 'Create Opportunity', and 'Edit O...'. Below the tabs is a section titled 'List Templates' with the subtitle 'These are the 50 most recently updated Templates'. A table lists the templates with columns for ID, Name, Status, Create Opportunity from Template, Copy, Edit, Delete, and View. The table contains four rows of data. A red box highlights the table area. Three yellow callout boxes provide instructions: one points to the 'List Templates' header, another points to the 'Create Opportunity from Template' column, and a third points to the 'View' column.

ID	Name	Status	Create Opportunity from Template	Copy	Edit	Delete	View
28	VP of Prof Dvlpmt/ Edu/Prof Dvlpmnt Dir/Ed. Dir - Call for Nominations	Posted	Create				View
26	VP Membership/VP of Member Services/Membership Director (TEMPLATE)	Posted	Create				View
27	VP Marketing/Marketing Director (TEMPLATE)	Posted	Create				View
1845	Volunteer_ PMI Leadership Institute Meeting_ 26 October 2013 New Orleans	Posted	Create				View

Create an Opportunity

Multiple-step process:

1. Create summary
2. Define pre-requisites
3. Add time commitment details
4. Add essay question details
5. Posting dates and details
6. Assign reviewer (optional)
7. Indicate Areas of Interest (optional)

Step 1Step 2Step 3Step 4Step 5Step 6Step 7

Opportunity Information

Volunteer Opportunity or Role Name ⓘ
 *

Coordinator name or Volunteer Engagement Liaison (VEL) ⓘ
Required to create

Coordinator Email
xxx01Email_#####@pmi.org

Chapter name
 *

Department ⓘ

Type of interaction ⓘ
 *

Description or summary (committee purpose) ⓘ

Deliverables ⓘ *

Duties ⓘ *

PMI region or locale ⓘ
 *

PMI subregion ⓘ

Country ⓘ

State/Province ⓘ

Limit applications to local volunteers only? ⓘ
 Yes
 No

* Required field for Posting Opportunity

Save and Continue

Click on Help icons throughout VRMS for tips and additional information

Opportunity Preview

You may preview an opportunity or template before copying or editing to see how the application will display to a volunteer.

Manage Opportunities | Manage Applications


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

List Opportunities

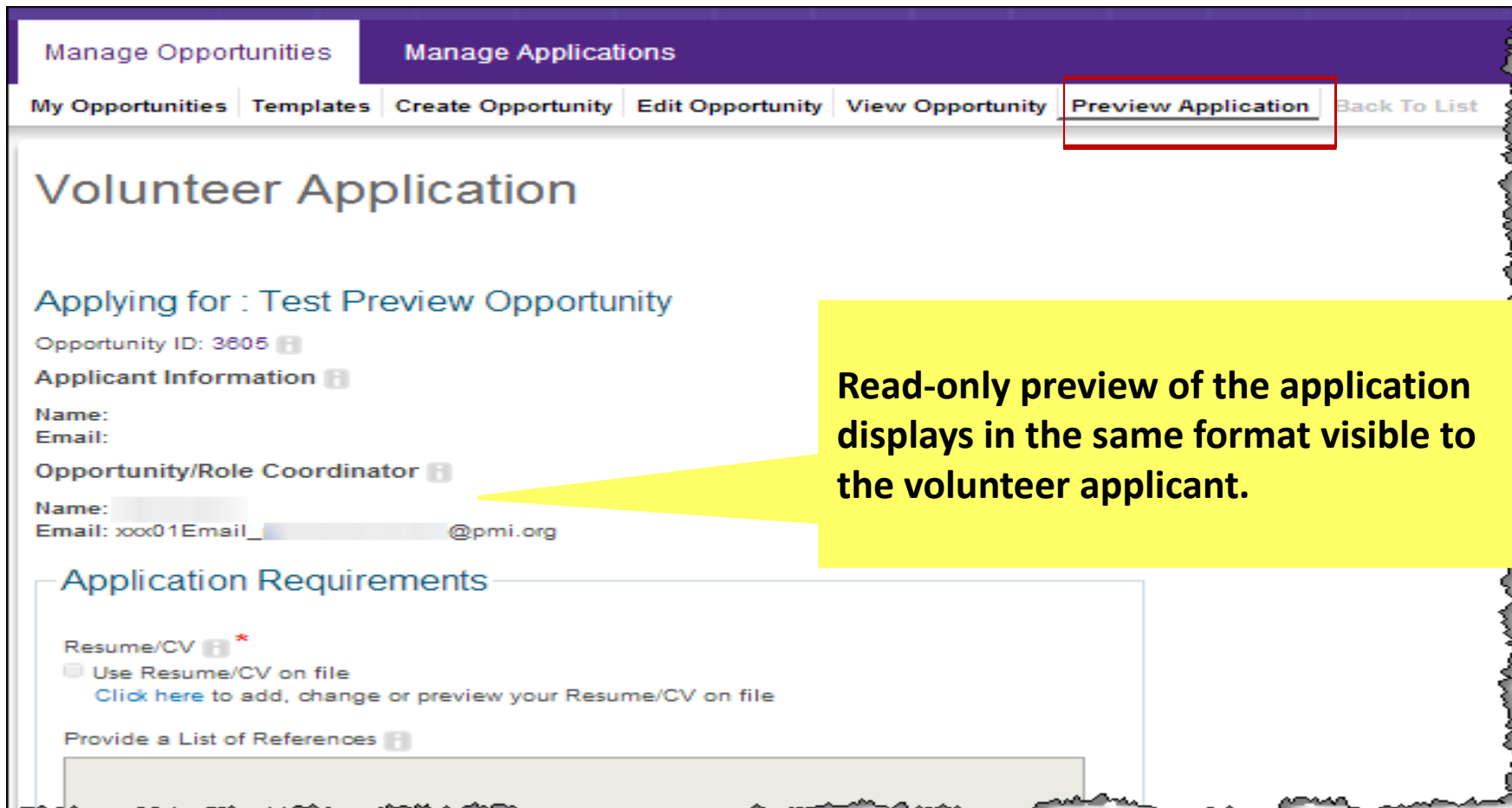
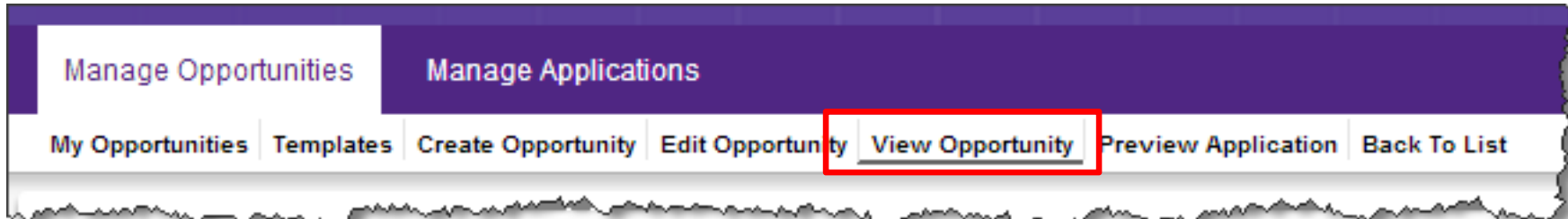
These are the 27 most recently updated Opportunities

ID	Name	Status	Copy	Edit	Delete	View
758	Volunteers -upcoming survey		Copy			View
3805	Test Preview Opportunity	Posted	Copy	Edit	Delete	View
3804	Test Oppt Preview	Draft	Copy	Edit	Delete	View

First, select the View option for the opportunity you want to preview.



Opportunity Preview



Step 1: Create Summary

- Name the opportunity
- State the ownership
- Describe the opportunity, the type of interaction, and deliverables and duties
- State the region or locale where the opportunity is based
- Choose if you want local volunteers only

The screenshot shows a multi-step web form for creating an opportunity summary. The form is titled "Opportunity Information" and includes the following fields and sections:

- Volunteer Opportunity or Role Name:** Local Applicant Required
- Coordinator name or Volunteer:** [Redacted]
- Coordinator Email:** xxx01Email_@pmi.org
- Chapter name:** Please select a chapter *
- Department:** Other
- Type of interaction:** In-Person *
- Description or summary (committee purpose):** Type a description of the opportunity. *
- Deliverables:** Type deliverables for the opportunity. *
- Duties:** Type the duties for the opportunity. *
- PMI region or locale:** Northern America *
- PMI subregion:** Northern America *
- Country:** United States
- State/Province:** Pennsylvania
- Limit applications to local volunteers only?:** Yes, No

Annotations and callouts:

- A yellow callout points to the Coordinator Email field: "Note the email address where you will receive applications."
- A yellow callout points to the Chapter name and Department fields: "If the opportunity is chapter-based, 'chapter' automatically populates the Department field."
- A yellow callout points to the Description or summary field: "Help provides tips for writing clear opportunity descriptions."
- A red box highlights the "Limit applications to local volunteers only?" radio button options.
- A red box highlights the "Save and Continue" button at the bottom right.
- A red asterisk icon indicates a required field for Posting Opportunity.

Opportunity Writing Tips

Estimated time commitment

Approximate time commitment is 5-10 hours for each review. The number of materials to review will vary. Volunteers will review minimum of one item of material per month.

Differentiate your opportunity in the first sentence of the description – shows in search results.

Description or summary (committee purpose)

Reviewers are needed to evaluate third-party published exam preparation books and materials for resale on our Web site, as well as to determine if the books or materials contain any PMI intellectual property (PMI IP) and determine whether a license for use of PMI IP is needed. The books will be for preparation for the PMI exam.

consider
ment to

Volunteers must be able to read, speak and write English fluently in order to evaluate and rate the prep materials, as well as to determine if the books or materials contain any PMI intellectual property ("PMI IP")

Deliverables

Provide objective feedback on the quality, value and relevancy of books and other materials submitted to PMI by third-party publishers or authors for resale consideration.

Use consistent, commonly known terms in all sections.

submitted to PMI by

Also identify and provide a list of any PMI trademarks and/or copyrighted materials used in the books or materials being reviewed.

The PMI Confidentiality and Records Compliance Agreement and the PMI Conflict of Interest Questionnaire will be emailed to you if you meet the initial requirements.

Duties

• Books/materials will be mailed to the volunteer. The volunteer will keep the exam preparation books and materials.

keep the exam preparation books and materials

• Volunteers will be e-mailed guidelines, PMI Conflict of Interest Questionnaire to be completed. Provide feedback to PMI with each exam preparation books/materials. Space will be provided for comments.

naire to be completed. Provide feedback to PMI with each exam preparation books/materials. Space will be provided for comments.

• Volunteers will e-mail the completed PMI Conflict of Interest Questionnaire back to the PMI Global Operations Center (GOC) Bookstore Administrator.

back to the PMI Global Operations Center (GOC) Bookstore Administrator.

• All information provided by PMI to the volunteer is confidential and the feedback provided by the volunteer to PMI is confidential. The information provided by the volunteer will be taken under advisement by PMI.

Language Tips for Writing Opportunities

1. When writing a chapter opportunity, use the language most commonly used by your chapter members.
2. GOC-based opportunities use English, so use English to search for GOC-based roles.
3. VRMS search matches language to language, it won't translate.
4. In the Special Instructions section of the application, ask volunteers to consider adding a resume in English or completing the service history in English and answering application questions in their native language.

Step 2: Define Pre-requisites

- Describe needed experience, education or skills sets (1000 characters)
- Specify the number of years as member or credential holder (number only)
- Select a credential, and years as a credential holder, if required.

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Step 7

Pre-requisites

PMI volunteer experience ⓘ
Type any volunteer experience requirements in 1,000 characters or less.

PMI education or training ⓘ
Describe any specific, PMI-sponsored education or training required for this position. This description is also 1,000 characters or less.

Desired skill sets ⓘ *

Describe any skills sets required for the position.

Number of years as a member ⓘ
1

Credential type ⓘ
PMP

Number of years as a credential holder ⓘ
1

* Required field for Posting Opportunity

Back Save and Continue

Use numbers only, no text. Round to the nearest number.

Step 3: Add Details

- Define the time commitment.
- Describe PDUs and other forms of recognition.
- Specify resume, interview, travel requirements.
- If a Standards opportunity, add Interest Category.
- State any additional steps or actions required during the application process.

Step 1 Step 2 **Step 3** Step 4 Step 5 Step 6 Step 7

Volunteer Opportunity D

Volunteer job category ⓘ
Exam Development *

Estimated time commitment ⓘ
two and a half days *

PDUs to be awarded ⓘ
14

Other recognition ⓘ
Describe any other type of recognition.

Show the Standards Development interest category field on the application ? ⓘ Interview required? ⓘ
 Yes No
 Yes No
 No

Resume required? ⓘ Travel required? ⓘ
 Yes No
 Yes No
 No

Amount of travel required ⓘ
less than 150 miles

Other steps or action required? ⓘ

Required field for Posting Opportunity

“Chapter” will populate the Volunteer job category if this is a chapter-based opportunity.

Describe the time commitment in terms of the length of the opportunity.

If copying a template, review these options before posting.

Standards Opportunity Interest Categories

Interest Category	Official Definition
Consultant	A member who represents his/her own interest and who is knowledgeable in project management disciplines and earns income by providing project management products/processes/services.
Organization Producer	A member who is employed by or is a representative of an organization that develops and/or produces project management products/processes/services.
Organization User	A member who is employed by or is a representative of an organization that utilizes project management products/processes/services to conduct its business activities.
Academic/Training	A member who is employed by or is a representative of an organization that engages in developing new knowledge at a research level and/or delivering project management education and/or training to individuals.
Government	A member who is employed by or is a representative of national, regional, local or international governmental bodies that uses project management products/processes/services.
General Interests	An individual or a representative of an organization who does not fit in any of the above categories.

Step 4: Add Details

- Specify copyright, additional role limitations, and term limit.
- Add search keywords.
- Define special instructions and add up to three essay questions.

Use the questions to provide candidates with a chance to offer more information. Essay questions will be a required field in the volunteer application process.

Step 1 Step 2 Step 3 **Step 4** Step 5 Step 6 Step 7

Volunteer Opportunity Details continued

Is the PMI Copyright form required?
 Yes
 No

Volunteer may hold other roles

Term limit for role ⓘ
2 days

Search keyword ⓘ
Example Opportunity Ter

Enter question(s) that should display on the application for this volunteer opportunity
Special instructions about questions to display on application ⓘ
Use the special instructions to type an introduction to your essay questions.

Question 1
Who is the chair of PMI's Board of Directors?

Question 2
Are you an educator or trainer?

Question 3
How do you win a PMI Linn Stuckenbruck award?

* Required field for Posting Opportunity

Back Save and Continue

Use one keyword to help volunteers find your opportunity when they search.

Step 5: Application Dates and Details

- Select the application open and close dates.
- Select the opportunity start and end dates.
- Select the number of volunteers needed.

When copying an opportunity, or using a template, verify dates before posting.

Step 1 Step 2 Step 3 Step 4 **Step 5** Step 6 Step 7

Posting Details

Application open date (mm/dd/yyyy)
(Opportunities are open to applications on this date)

Application close date (mm/dd/yyyy)
(Opportunities are closed to applications on this date) *

Start date of opportunity (mm/dd/yyyy) *

End date of opportunity (mm/dd/yyyy) *

Number of persons needed: *

Opportunity create date:

Opportunity update date:

* Required field for Posting Opportunity

Use interactive calendar to select dates. Application close date must be before opportunity start date.

If no end date, use the end of the year as the end date.

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Guidelines for Reviewers

Reviewers can be:

- Coordinators
- Reviewers on other opportunities
- Anyone with a PMI.org username and password

Reviewers cannot:

- Apply for the opportunity for which they are evaluating applications

Step 6: Select Reviewers (optional)

- Search for a reviewer by name, username, PMI ID, or email address.
- Select from search results list.
- Selected reviewers display at the top of the page.
- Add and remove reviewers as needed.

Step 1 Step 2 Step 3 Step 4 Step 5 **Step 6** Step 7

Add a Reviewer (optional)

You have the option to select one or more individual(s) to review applications for your volunteer opportunity.

Selected Reviewers

Select	First Name	Last Name	Username	PMI ID	Email
	JOHN	SMITH	JOHN.SMITH	12345	JOHN.SMITH@EXAMPLE.COM

Search for a Reviewer

First name: Last name:

Email:


Reviewer search results

Select	First Name	Last Name	Username	PMI ID	Email
	JOHN	SMITH	JOHN.SMITH	12345	JOHN.SMITH@EXAMPLE.COM
	JANE	DOE	JANE.DOE	67890	JANE.DOE@EXAMPLE.COM
	BOB	BROWN	BOB.BROWN	11111	BOB.BROWN@EXAMPLE.COM
	ALICE	WILSON	ALICE.WILSON	22222	ALICE.WILSON@EXAMPLE.COM
	CHARLIE	GREEN	CHARLIE.GREEN	33333	CHARLIE.GREEN@EXAMPLE.COM
	DAVE	BLACK	DAVE.BLACK	44444	DAVE.BLACK@EXAMPLE.COM

Step 7: Areas of Interest

- Select one or more areas of interest.
- Helps match volunteers to opportunities with same areas of interest.

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 **Step 7**

Add an Area of Interest (optional) 

<input type="checkbox"/> Academic Outreach	<input type="checkbox"/> Advisor
<input type="checkbox"/> Analyst	<input type="checkbox"/> Certification
<input type="checkbox"/> Chapter Development	<input type="checkbox"/> Communications
<input type="checkbox"/> Editor	<input type="checkbox"/> Content Contributor
<input type="checkbox"/> Exam Developer	<input type="checkbox"/> Evaluator
<input type="checkbox"/> Facilitator - Online Content	<input type="checkbox"/> Facilitator - Live Learning
<input type="checkbox"/> Information Technology	<input type="checkbox"/> Finance
<input type="checkbox"/> Language Translator	<input type="checkbox"/> Knowledge Mapping and Indexing
<input type="checkbox"/> Membership	<input type="checkbox"/> Marketing
<input type="checkbox"/> Online Community Moderator	<input type="checkbox"/> Mentor
<input type="checkbox"/> Pilot Participant	<input type="checkbox"/> Operations
<input type="checkbox"/> Presenter - Webinars	<input type="checkbox"/> Policy/Governance/Ethics
<input type="checkbox"/> Requirements Gatherer	<input type="checkbox"/> Professional Development/Education
<input type="checkbox"/> School -Student Mentor/Judge	<input type="checkbox"/> Reviewer
<input type="checkbox"/> Speaker	<input type="checkbox"/> Seminars and Events
<input type="checkbox"/> Standards	<input type="checkbox"/> Sponsorship
<input type="checkbox"/> Volunteer Coordination	<input type="checkbox"/> Tester

Section 3: Manage Applications

How to Manage Applications

Summary of open positions and applications received.

End Date, number of openings and number of applications.

ID	Opportunity Name	Posting End Date	Openings	Applications
756	Volunteers - upcoming survey	2013-02-08	20	15
1647	Chapter Member Advisory Group (CMAG)	2013-08-02	4	45

Click opportunity name to view individual applications.

View Application Details

All applications for a specific opportunity on one page.

Click to view an applicant's service history, resume or the complete application.

Manage Applications

Active Opportunities **Application Details** Review Application Service History

Submitted applications for the opportunity:
Volunteers - upcoming survey

Export all applications ⓘ Export accepted applications ⓘ

App. ID	First Name	Last Name	Email Address	Application Status	Standards Interest Category	Status Date	Extend Offer	Do Not Extend Offer	User Profile	SVC History End Date	Resume	App.
7623			xxx0@pmi.org	Submitted	none	2013-02-28	Extend	<input type="checkbox"/>	View			View
7632			xxx0@pmi.org	Submitted	none	2013-02-28	Extend	<input type="checkbox"/>	View			View

If a Standards opportunity, the volunteer's Standards Development Special Interest will also display.

Mark this Opportunity as 'Fulfilled'

Application Export Options

The screenshot shows a web application interface with a purple header bar containing 'Manage Opportunities' and 'Manage Applications'. Below the header is a navigation menu with 'Active Opportunities', 'Application Details', 'Review Application', 'Service History', 'Find Volunteers', and 'Back To List'. The main content area displays 'Submitted applications for the opportunity: Volunteers - upcoming survey'. Two buttons are visible: 'Export all applications' and 'Export accepted applications', both highlighted with a red box. A dark grey callout box labeled 'Step 1:' points to the 'Export all applications' button. A second dark grey callout box labeled 'Step 2:' points to the 'Open' button in a dialog box that asks 'Do you want to open or save Opportunity3022-Applications.csv from vrms.pmi.org?'. A third dark grey callout box labeled 'Step 3:' points to the 'Application ID' column header in a Microsoft Excel spreadsheet overlay. The spreadsheet has columns for Application ID, Application First Name, Application Last Name, Application ID, Application Date, Opportunity, and Has resume. The data rows show three applications with IDs 169 and 168, both dated 4/4/2015, with 'Has resume' values of 'No' and 'Yes' respectively.

Submitted applications for the opportunity:
Volunteers - upcoming survey

Export all applications Export accepted applications

Step 1:

Step 2:

Step 3:

Application ID	Application First Name	Application Last Name	Application ID	Application Date	Opportunity	Has resume
169				4/4/2015	No	
168				4/4/2015	Yes	

Review Application

Manage Opportunities | Manage Applications

Active Opportunities | Application Details | **Review Application** | Service History | Find Volunteers | Back To List

Volunteer Application

Applying for : Chapter MAG

Opportunity ID: 837

Applicant Information
Name: Susan Bowen
Email: susan.bowen@pmi.org

Job name
Chapter MAG

References
Alison Bowen

Coordinator name or Volunteer Engagement Liaison (VEL)
Name: Susan Bowen
E-mail: susan.bowen@pmi.org

Reason to apply for this opportunity?
It will be fun

Non PMI Experience
I was a volunteer at my church

Start Date:
1/31/2012 12:00:00 AM

End Date:
12/31/2012 12:00:00 AM

Search keyword
Leadership

Special instructions about essay
Special Instructions

Essay Questions
Even more special instructions

this is essay 1

The Most Special

this is essay 2

Please answer one of the above three questions

this is essay 3
Describe how the Colts leaving Baltimore crushed the dreams of a ten-year-old boy.
Everytime I see a Mayflower moving van, I have an uncontrollable tick.

Comments:
Here are my comments about this application. I think I want to interview this person.

Update Comments

The applicant's responses display on one page.

Coordinator may read, but not edit the application.

Add comments to highlight your review, compare applications.

Comments display only to the coordinator on the Application Details page.

Reviewer Access to Applications

Manage Opportunities

Manage Applications

Active Opportunities

Application Details

Review Application

Service History

Find Volunteers

Back To List

Submitted applications for the opportunity:

Volunteers - upcoming survey

Export all applications ⓘ

Export accepted applications ⓘ

App. ID	First Name	Last Name	Email Address	Application Status	Standards Interest Category	Status Date	Extend Offer	Do Not Extend Offer	User Profile	SVC History End Date	Resume	App.
7623			xxx0 @pmi.org	Submitted	none	2013-02-28	Extend	<input type="checkbox"/>	View			View
7632			xxx0 @pmi.org	Submitted	none	2013-02-25	Extend	<input type="checkbox"/>	View			View

Reviewers Can Comment on Applications

Volunteer Application
Applying for : **Region Mentor - copy template**
Opportunity ID: 88

Applicant Information
Name: Susan Brown
Email: susan.brown@gpmc.org

Job name
Region Mentor - copy template

References
Nancy Berger

Coordinator name or Volunteer Engagement Liaison (VEL)
Name: [redacted]
E-mail: [redacted]

Reason to apply for this opportunity?
I like volunteering

Non PMI Experience
International Hospitality Network

Start Date:
5/1/2013 12:00:00 AM

End Date:
11/15/2013 12:00:00 AM

Search keyword
Region Mentor

Special instructions about essay
Question 1,2 should be your response to the scenarios listed below.

Essay Questions
Director Y's team members are planning to hold a meeting under the auspices of the chapter to discuss the details of specific contracts, of which their respective firms are bidding. Director Y was not invited to the meeting and has no interest in

Comments: [icon]

Reviewer Name - 30 April 2013 - [redacted] [redacted] launched on 28 February 2010. The [redacted] that develop over time as new requirements are identified by our stakeholder groups and new systems and programs are created from the existing needs of the business. Since launch, the interest and acceptance in the [redacted] from our global volunteer communities has been mainly positive. Initial feedback has indicated that the system is easy to use and that the number of interested members applying for

Update Comments

Please enter your name or initials with your comments. While there is no character limit for your comments, the text box does not offer formatting. Therefore, it is recommended you separate your name or initials with dashes so it stands out from your comments.

Section 4: How to Extend an Opportunity to a Volunteer

Extending Opportunities to Volunteers

Important steps which must be followed:

1. Select the volunteer to which you will offer an opportunity. Click the Extend button.
2. The volunteer will receive an email message from the VRMS asking them to accept or decline the opportunity offer.
3. The volunteer's response will trigger a change in his or her application status in VRMS.
4. DO NOT mark an opportunity as fulfilled until you have all acceptances from volunteers offered opportunities.



Do not click “Mark this Opportunity as Fulfilled” until you have received responses from all volunteers who have received offers. This button closes the opportunity and volunteers will not be able to accept.

Extend a Volunteer Opportunity

Manage Opportunities | Manage Applications

Active Opportunities | Application Details | Review Application | Service History | Find Vo

Submitted applications for the opportunity:
Volunteers-upcoming survey

Export all applications | Export

Step 1:

App. ID	First Name	Last Name	Email Address	App. Status	App. Date	Extend Offer	Extend	User	Resume	App.
7623			xxx0@pmi.org	Submitted	2013-02-28	Extend	<input type="checkbox"/>	View		View
7632			xxx0@pmi.org	Submitted	2013-02-25	Extend	<input type="checkbox"/>	View		View

Step 2:

Optional: Indicate applicants who will not receive an offer.

Click to extend an offer.

Step 2:

Email to volunteer with position offer, status change displays to volunteer

Name: Volunteers - upcoming survey
Status: Extend Offer
Submit Date: 2011-10-25

Resend the Offer Email (Optional)

Manage Opportunities | **Manage Applications**

[Active Opportunities](#) | [Application Details](#) | [Review Application](#) | [Service History](#) | [Find Volunteers](#) | [Back To List](#)

Submitted applications for the opportunity:
PMI "Virtual Congress" Pilot Participant

[Export all applications](#) | [Export accepted applications](#)

App. ID	First Name	Last Name	Email	Current Application Status	Standards Interest Category	Status Date	Extend Offer	Do Not Extend Offer	User Profile	SVC History End Date	Resume	App.
15011	Paul	Trapp	[redacted]@pmi.org	Offer Declined	none	2013-12-31	<input type="button" value="Extend"/>	<input type="checkbox"/>	View			View
14475	Roberta	Warrington	[redacted]@pmi.org	Offer Extended	none	2013-11-11	<input type="button" value="Extend"/> <input type="button" value="Resend"/>	<input type="checkbox"/>	View			View

Fulfill or Close Volunteer Opportunities

Manage Opportunities | Manage Applications

Active Opportunities | Application Details | Review Application | Service History | Find Volunteers | Back To List

Submitted applications for the opportunity:
Volunteers-upcoming survey

Export all applications ⓘ | Export accepted applications ⓘ

App. ID	First Name	Last Name	Email Address	Application Status	Standards Interest Category	Status Date	Extend Offer	Do Not Extend Offer	User P
7623			xxx0 @pmi.org	Submitted	none	2013-02-28	Extend	<input type="checkbox"/>	View
7632			xxx0 @pmi.org	Submitted	none	2013-02-25	Extend	<input type="checkbox"/>	View

Step 3:

Indicate applicants who will not receive an offer (optional).

Step 4:

Mark this Opportunity as 'Fulfilled'

Mark opportunity as fulfilled once all offers are accepted – sends thank you email to those not selected.

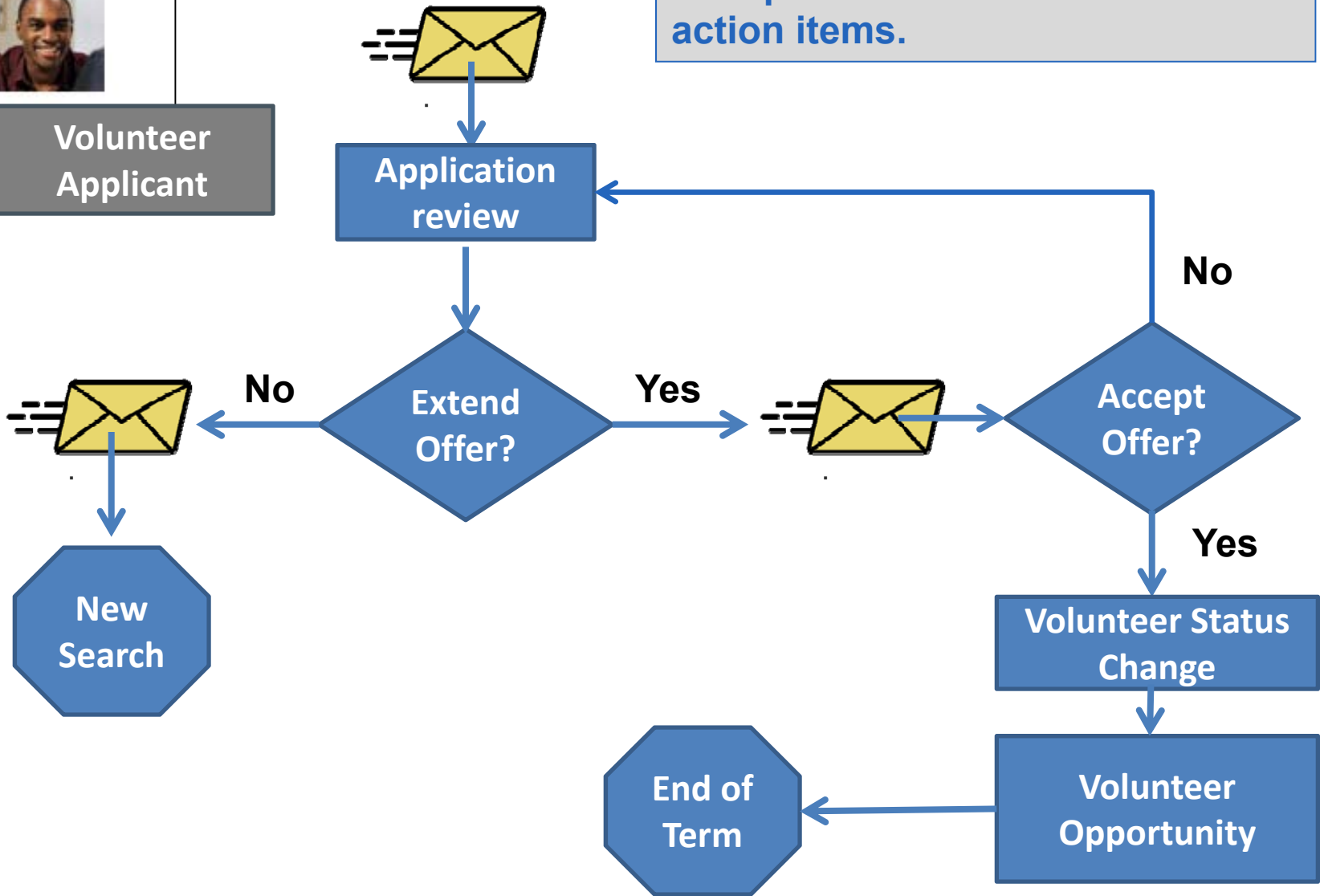


Email Communications



Volunteer Applicant

NOTE: Volunteer must read the Acceptance Letter – it includes action items.



About Legal Agreements for GOC Opportunities

Volunteer opportunities offered through PMI's Global Operations Center (GOC) will require a volunteer to review, complete, and return up to three PMI legal agreements, including:

1. Confidentiality Agreement,
2. Conflict of Interest Agreement, and
3. Copyright Agreement (if required by the opportunity).

The latest copy of each agreement is found on www.pmi.org:

<http://www.pmi.org/en/About-Us/Governance.aspx>



Chapter opportunities do not require these three PMI Agreements. Chapter coordinators will notify volunteers of any required chapter-specific agreements.

How to Receive Signed Agreement

After downloading a copy of the agreement, the volunteer who accepted the opportunity must use one of the following three options to submit completed agreements to you:

- Print, sign, scan and email to the coordinator **OR**
- Print, sign, and send to the coordinator by postal mail **OR**
- Fill out the agreement online, save a copy, print, sign and either email or send by postal mail.



PMI GOC these coordinators (or VELs) must forward completed agreements to the PMI Legal team along with a list of volunteer names and opportunity for which each volunteer is applying.

Volunteer Coordinator Questions

- How can I learn tips for creating opportunities or using templates?
- What should I look for when reviewing applications?
- How do I extend an opportunity to a volunteer?
 - ✓ Read the context-sensitive help tips available on the opportunity creation and application review page.
 - ✓ View the VRMS Guide available from the link in the upper right of each page.

Volunteer Coordinator Questions

- Who do I contact if my volunteer doesn't receive an offer email?
 - ✓ Ask the volunteer to check his or her spam filter, verify they are checking the email in their profile.
 - ✓ Contact volunteer@pmi.org to request that a VRMS admin investigate the problem.
- What happens if a volunteer quits a position?
 - ✓ Contact voluteer@pmi.org to request that a VRMS Admin re-open the opportunity so a new volunteer can be assigned.

Volunteer Coordinator Questions

- Will the VRMS import my permissions from the Component System (CS)?
 - ✓ The Component System will not convey your permissions to VRMS. If you have access to the Component System, you must request coordinator permissions in VRMS.
- Can I add chapter or community specific agreements to the application?
 - ✓ Continue to process other agreements according to your current processes.

Section 5: Support Contacts

Learn more about the VRMS

Context-sensitive help and training video links:

The screenshot shows the top navigation bar of the VRMS website. On the left is the PMI logo with the text "Volunteer Relationship Management System". To the right, there is a user greeting "Welcome, [blacked out]" followed by a red-bordered box containing the text "VRMS Guides". Other navigation links include "Coordinator View", "PMI.org", "VRMS Feedback", and "Log Out". Below the navigation bar is a dark blue menu with the following items: "Home", "Volunteer", and "Profile". A grey callout box with the text "User guide video links" is positioned over the "VRMS Guides" link.

The screenshot shows a form titled "Opportunity Information". A red-bordered box highlights the text "Volunteer Opportunity or Role Name" next to an empty input field. Below this field is the text "Coordinator name or Volunteer Engagement Liaison (VEL)" followed by "Susan Bowen". A red asterisk is located to the right of the input field. A grey callout box with the text "Context-sensitive help" is positioned above the form. To the right of the form is a yellow callout box with a red border containing the text: "Type the name of the opportunity or the role. You can use up to 100 characters. The terms opportunity and role are synonymous. For Chapter and Community opportunities, include the Chapter or Community name." A blurred image of a person is visible in the background of the form area.

Volunteer Programs and Services Team:

1. Use this email for VRMS questions from volunteers, requests for training, questions about using VRMS:

volunteer@pmi.org

2. Use this link for feedback or system feature suggestions:

VRMS Guides Coordinator View PMI.org [VRMS Feedback](#) Log Out

Tell us your VRMS suggestions!

Good luck with your volunteer coordinator activities!

