

# **Volunteer Relationship Management System (VRMS)**

# **Frequently Asked Questions (FAQ)**

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# **VRMS Volunteer Questions**

#### What is the VRMS?

 The VRMS is a searchable, centralized and integrated volunteer web application and database that is available to current and prospective volunteers. The VRMS integrates with PMI's membership database and improves the process and user experience for volunteers to interact with PMI.

# Why did PMI launch the VRMS?

 The VRMS is an important example of PMI's continued investment in improving the support we provide to our volunteers. This system supports PMI and PMI communities in its ongoing efforts to further establish a standardized and consistent approach to volunteer relationship management.

#### How can I access the VRMS as volunteer?

 You can access VRMS from the **Get Involved** tab of <u>www.PMI.org</u>. Use your registered username and password to login to VRMS.

### How can I access the VRMS as a community leader?

 You can access VRMS from the **Get Involved** tab of <u>www.PMI.org</u>. Use your registered username and password to login to VRMS.

## How can my community begin using the VRMS?

- If you are interested in using the VRMS as a tool to support your community, please contact us at <u>volunteer@pmi.org</u>.
  - Please include your community name, volunteer contact name and email in your request.
  - PMI staff will schedule a time to discuss next steps. Next steps include training and granting of permissions for system access.

#### Where can I learn more about the VRMS?

 Support materials including context-sensitive online help built into the VRMS and how-to video guides provide instructions to VRMS users. Additionally, PMI provides ongoing training webinars that are housed in PMI Learn, PMI's Learning Management System (LMS). Live demonstrations of VRMS will be available at our global and regional meetings.

# Does VRMS support languages other than English?

 Yes, volunteers can complete applications using other languages, and coordinators can create opportunities using other languages. There is no translation available in VRMS – text will display in the language in which it is entered. Please remember that using special characters before a search term may cause the search to fail.

# **Service History Questions**

# Why don't I see all the events that I have attended or awards that I have received in my service history in the VRMS?

 PMI has limited records of volunteer services history. Only records from the Component System are imported at this time. You can use this opportunity to create your service history.

# How do I update records in the Component System (CS)?

• Please contact your Chapter President to request updates to Component System records. Your Chapter President must make the change in the Component System.

# How do I update Global Operations Center (GOC) or Community of Practice Community (CoP) records?

Please contact <u>volunteer@pmi.org</u> to request updates or edits to GOC or CoP records.

### **How do I update Membership or Certification records?**

 Please contact Customer Care to request updates or edits to any membership or certification records. Membership and certification information cannot be edited in VRMS.

# How does PMI validate service history?

 You must attest to the accuracy of your service history when submitting an application. Applications may require an interview. You must read, complete and return any agreements required in the application.

#### What should I do if I can't find the right category for a service history item?

• You can use the "Other" category to describe service history items not listed.

# **Resume Questions**

#### What file types are accepted?

 VRMS accepts the following file types: .doc, .docx, .rtf, .txt and .pdf. The file size limit is 500 KB or less.

#### What should I do if my resume file is too big or not the correct file type?

• Edit your resume to highlight the content most appropriate for the opportunities you're considering.

#### What information should my resume include?

• The content of your resume is up to you. You can use your resume to highlight non-PMI volunteer experience not listed in your service history.

# **Search Questions and Tips**

# Why can't I find an opportunity for my chapter or community?

 Some chapters or communities might not use the VRMS. Please check your chapter or community website.

#### How can I narrow search results?

 Use chapter, community, duty, deliverable or area of interest terms as key words; use wildcards to refine.

### What do the interaction types mean?

• In-person means face-to-face interaction; virtual means online interaction.

# Are there any tips for searching in VRMS?

- Here are some tips for searching in VRMS. Search tips also display on the search page and in the VRMS guide. These tips apply to both volunteers seeking opportunities and volunteer coordinators seeking volunteers:
- 1. Use the term or phrase search option to search for a term or a phrase in an opportunity name, description, deliverables or duties.
- 2. Use ? to perform a single-character wildcard search.
- 3. Use \* to perform a multiple-character wildcard search. You can use \* before or after a search term. You cannot use \* term \*.
- 4. Use the Boolean operators: NOT, AND, OR, + or to exclude or include search results. NOT, AND and OR must be uppercase.
- 5. Use + to require that the term after the + exists in the opportunity name, description, deliverables or duties.
- 6. Use to exclude opportunities that contain the term after the in the opportunity name, description, deliverables or duties.
- 7. Limit the use of special characters as part of a search. For example, do not use \ before a search term. Also the characters < and > may cause search issues.

# **Volunteer Opportunity Application Questions**

### Can I save my application to come back and edit longer?

 Yes, save your application as a draft to return for edits. You can access your draft from the Welcome page. Once you submit an application, no edits are permitted.

# How long is the application open, and how must time can I take to complete an application?

• You must submit your application before the close date listed on the application description. Once all openings for an opportunity are filled, the application closes.

# Whom do I contact with questions about the application?

• Contact the coordinator listed on the opportunity.

# Can I apply for more than one opportunity at the same time?

• Yes. However, if you're extended an offer, certain opportunities may require that you not accept overlapping or conflicting opportunities.

# Must I be a member or credential holder to apply?

 Not always. The opportunity details will state membership, certification, and experience requirements.

# **Chapter or Community Leader Questions**

# I am a chapter or community leader. Whom do I contact if I want to use VRMS for my chapter or community?

 Contact <u>volunteer@pmi.org</u> to make the needed arrangements to begin using VRMS for your chapter or community.

#### Whom should I contact with comments or feedback about the VRMS?

 Use the VRMS Feedback link in the upper right hand corner of all VRMS pages. A VRMS email message opens for you to enter your comments and feedback.

# I will be managing volunteer opportunities for my chapter or community. How do I get access and training to be a volunteer coordinator?

• You can contact the Volunteer Programs and Services team (<u>volunteer@pmi.org</u>) and they can provide training and answer questions

# **Volunteer Coordinator Questions**

# How can I learn tips for creating opportunities or using templates in the VRMS?

• Read the help tips available on the opportunity creation and application review page. You can also attend a VRMS training session - contact <u>volunteer@pmi.org</u> for more information. Another resource is the VRMS Guide, which is available from the link in the upper right of each page.

# What should I review before I post an opportunity?

- The coordinator should:
  - Review the Description field contents, especially the first sentence as this sentence displays in the Find Opportunity search results visible to prospective volunteers.
  - Check that all start and end dates are accurate. Use the new calendar widget to add or change dates.
  - Preview the application to ensure the Special Instructions for Essays field is appropriate and the correct number of essay questions displays.
  - Ensure the copyright form is selected to display on the application if the opportunity requires this form to be signed by volunteers.

# Can a chapter or community have more than one coordinator?

 Yes, however each coordinator will only be able to manage the opportunities that he or she has created. When a chapter or community has more than one coordinator, those coordinators must communicate to ensure opportunity management efforts are not duplicated.

### When can a coordinator find a prospective volunteer using the targeted search?

- A volunteer is considered active in the VRMS after he or she completes the following actions:
  - Adds a row to the service history, events, awards, or scholarships area on the Profile and Service History page.
  - Uploads a resume to VRMS.
  - Applies for an opportunity.

#### How can a coordinator get a list of applicants for his or her opportunities?

 Use the Manage Applications function to see a list of the applicants who have submitted applications for your opportunities. Additionally, a coordinator can export the list of all applicants, or only applications who have accepted, to an Excel<sup>®</sup> spreadsheet.

# **Volunteer Administrator Questions**

### Whom do I contact if my volunteer does not receive an offer email?

 Ask the volunteer to check his or her spam filter, and verify they are checking the email in their myPMI profile. You can also contact <u>volunteer@pmi.org</u> to request that a VRMS admin investigate.

## What happens if a volunteer quits a position?

 Contact <u>voluteer@pmi.org</u> to request that a VRMS Admin re-open the opportunity so a new volunteer may apply.

# 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.

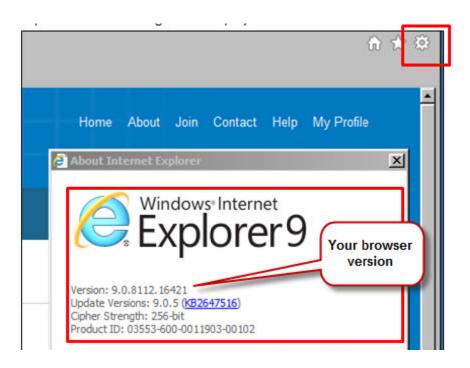
# **Internet Explorer 9 Compatibility Questions**

If you are using Internet Explorer 9 (IE 9) as your web browser, there should be no visible issues when using VRMS. However, if you select the Compatibility View in IE 9, you may see the following minor display issues:

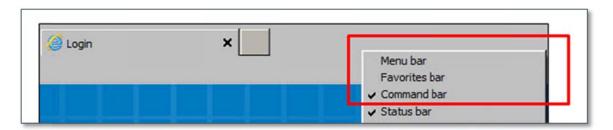
- 1. In the Service History, when adding a row from a category with a long list of choices, the user may see blue lines displaying across the list.
- 2. In the Create Opportunity function for coordinators, the coordinator may see Save and Next buttons not in alignment.
- 3. In the Create Opportunity function for coordinators, the user may not be able to select the calendar widget to enter application or opportunity start and end dates.
- 4. Search button moves to one side when the user selects the country search criteria.

# If you have a display issue in VRMS, please check the following browser settings in IE 9:

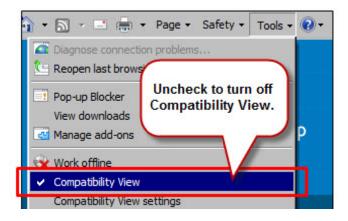
1. Check the version of Internet Explorer that you are using. To do this, select the gear icon at the upper right-hand corner of the header. Select About Internet Explorer.



2. Bring up the Command Bar, which hosts the Tools menu. Click on the gray area in the header. Select the Command bar option.



3. Do you have the compatibility view selected? Select the **Tools menu** on the left-hand side of the header. Check if the **Compatibility View** is selected.



4. If selected, un-select the Compatibility View and let the screen refresh to resolve the display issue.