This manual is a step-by-step guide to help you utilize the Volunteer Management System (VMS). If you have any questions, contact volunteer@roboticseducation.org.
# Table of Contents

First Time User.................................................................................................................................................. 3  
Establishing Event in VMS .................................................................................................................................. 3  
Volunteer Management System......................................................................................................................... 4  
   Details............................................................................................................................................................... 5  
   Roles............................................................................................................................................................... 6  
   Divisions/Area.................................................................................................................................................. 7  
   Shifts.............................................................................................................................................................. 8  
   Division Assignment......................................................................................................................................... 9  
   Volunteers........................................................................................................................................................ 10  
   Content........................................................................................................................................................... 11  
   Reports........................................................................................................................................................... 12  
   Go to Check-In .............................................................................................................................................. 12
First Time User

Create a user ID in VMS by going to https://volunteers.robotevents.com and select Login and choose Login with RobotEvents.com

If you previously volunteered and have a user ID in the VMS, you must link to your RobotEvents account. To link the accounts, log into the VMS and select the “My Account” and “Link account to RobotEvents”

Establishing Event in VMS

Once accounts are linked and your event is approved in RobotEvents, you will be able to create your event in the VMS.

RobotEvents

- Go to Download and Links and select “Create in Volunteer Management System”
1. Choose Event Administrator from drop-down menu and click “Add Event to VMS”. If there are more than one administrator, you will be able to add the additional administrators in the VMS once they have a registered account.

![Add Event to VMS](image)

2. If selected administrator has a valid account in the VMS, then this message will appear at the top of the page.

   ![Event was added to VMS successfully](image)

**Volunteer Management System**

Once your event is linked to the VMS, you will now see an Admin tab added to the home page.
On the Admin Home Page select **Events** on the left side of your screen:

On the Events page, you will see only your event(s). Select Edit on the event you wish to edit.

Let’s look at each tab on the right:

**Details**

Selecting Edit takes you to the **Details** of your event. On the Event Details page there is the event name, logo, start date, end date, and description. You can update all fields except description (that will come later in the content tab). If your event will have set-up volunteer roles the day before, you can adjust the start date.
Roles

The VMS has standard roles automatically established and available for every event. Each standard role includes detailed information about the role and downloadable resources (if applicable).

Note: This page is accessed by clicking house icon in upper left of admin screen. Click “Admin” to return to Admin Home Page.

On the Roles tab, you will see a list of global roles that are available for your event. These roles will be automatically available when you add your shifts (in a following section). However, you are not required to use these roles.
OPTIONAL: As an Administrator of your event, you can also add additional roles specific to your event by going to the Roles tab in your event and selecting Add Role. Complete the section with the name of the role, a description, available to minors, and volunteer check-in access. Select Save.

NOTE: The Delete danger area will delete the role ONLY if no volunteers are assigned to it.

Divisions/Area

Like the Roles tab, you will see a list of divisions that are available for your event. These divisions will also be available when you add your shifts (in the next section). You may edit the titles of the divisions and use only those needed for your event.

OPTIONAL: As an Administrator of your event, you can also add additional divisions specific to your event. Select + Add Division, type the name you want and Select Save. Repeat for all divisions.
Shifts

There are two options to build shifts: Add Shift or Upload Shifts (templates coming soon).

Add Shifts: Select +Add Shift and complete the page. Select Save.
Example: In the above example, Division is **Team Check In** and Role is **Check In Assistant. Three** are needed and the shift time is from **8:00 am – 5:00 pm.** This is a **published** role.

![Division Assignment Screen]

After creating a role, there are three actions you can take: Edit, Volunteers (select volunteers showing available for this particular role), and Copy (copy all the information a shift and edit accordingly).

### Division Assignment

Once you assign all of your shifts, then you start assigning volunteers as they register. There are multiple ways to assign shifts. First is through the "Division Assignment" Tab.

![Assigned Volunteers Screen]

The above example shows all roles in the “Assigned Volunteers” column. Listed here is the names of volunteers that are already assigned or the words “Assignment Needed.” To assign from here select “Assignment Needed” and a drop-down menu appears of all available volunteers for that role.
Volunteers

The second way to assign a volunteer is through the Volunteers Tab:

Your screen shows ALL volunteers that registered for your event. Choose any volunteer by selecting “Edit” next to their name. For each volunteer, there are three different tabs: Schedule, Registration, and Manage Shifts (default tab.)

On the Manage Shifts tab, all available shifts for this volunteer is listed. Also listed is the quantity needed at the event and the number unfilled. Select “Assign” to the right of the role you wish to assign this volunteer.

For more detail, the Registration Tab will list what this volunteer selected when registering.

In the above example, Taunja Test selected all roles and is available from 10:00 a.m. – 8:00 p.m., which happens to be the full length of the day. By default, the system sets the availability time (matching the event time).
Once a selection is made for a volunteer, his/her schedule updates under the Schedule Tab.

The above example shows Taunja Test assigned as an Inspector from 10:00 am-11:59 am and then as an Emcee from 12:00 pm-6:00 pm.

### Removing a Volunteer

To remove a volunteer from an event, select “Volunteers” from the column on the right and then select “Edit” next to the volunteer’s name. Select the toggle button in the upper righthand corner of the “Manage Shifts” tab. Select “Remove Registration”

This removes the volunteer from this event, but NOT from the database.

**Note:** All shifts must be unassigned before the volunteer is removed.

### Content

**Description of event**

**Registration mail body** (sent to user when they register for an event.)

**Assigned mail body** (sent to user once they are assigned a shift. VMS will automatically include details about what date/time/role they are assigned.)
Reminder mail body (sent to the volunteer several days before the event and again several hours before their shift starts. VMS will automatically include details about what their date/time/role.

Reports

Go to Check-In

Search for volunteer and check in!

Contact

If you have any questions, please email volunteer@roboticseducation.org.