Milo update – March 2015

Milo User Licences

The new version of Milo will be provided to TSIs by SCVO with an allocation of free user licenses. This will mean that all TSIs will continue to have free access to the Milo system. However, as Salesforce licences must be purchased by SCVO annually, the number of user licences available will be limited.

We therefore need to know how many Milo user licenses you anticipate needing for your TSI. We have been able to start projections on licence allocation by looking at usage statistics by area over the past year, but it is important to get feedback from TSIs on anticipated demand.

To do that, we will be contacting your local Milo lead today to ask them to complete a very brief SurveyMonkey form to provide us with your estimated requirements. We cannot guarantee that every TSI will be able to receive all the licences they request, but in the event that some TSIs require more than the standard allocation, they will have the option to purchase additional licenses. (For reference, the current cost of a standard Salesforce licence at non-profit rate is £36 pa plus VAT.)

Completed surveys should be submitted no later than **Friday 10 April**.

Milo new system FAQ

We have begun to collate the most frequently asked questions about the new system online. The FAQ provides up to date information on the background to the move, the Salesforce platform, what will be different about the new system, how web feeds will be maintained etc.

You can view the Milo FAQ by clicking on this link.

The FAQ is intended to be a living document. If you have questions that aren't answered by the FAQ, or would like more detail in some areas, just email gavin.bell@scvo.org.uk

Interaction Management

As discussed at the user group and mentioned in the previous update, the approach to recording interactions on Milo will be changing.

In general, most of the existing Milo structures (organisations, contacts, volunteers, opportunities) and the way in which they interrelate will be replicated in the new system. **Interaction management** is the main exception to this. Because of the way Salesforce works, it will not be possible to replicate the existing structure of episodes and interactions, where an episode acts as a shell for one or more interactions. The new system will use interactions only, similar to the 'case file' approach already used by several TSIs including South Lanarkshire.

This means that every interaction with an organisation can be categorised and reported on, and should make for a more consistent system across the network.

It does mean that in most cases, interactions will have to start afresh on the new system. We will be making sure historic interactions are copied from the old system, and will be made available to each TSI for reference. We are currently investigating if it will be possible to incorporate this 'historical view' of past interactions into the new system, but at a minimum you will be able to view interactions from previous years in a separate document.

Next steps

- An extension with Sopra and Pulsant has been arranged so that the existing Milo system will be supported until **June 30th**
- We are still planning on migration to the new system in **May** – following agreement by all partners, we should be identifying a firm date within the next week
- Migration work will involve one week of downtime – this will only have to happen once, and all TSIs will be migrated at the same time
- Advance testers from the User Group have been working on the test build, and we'll be widening the pool of testers soon – if you would like to be involved, please let us know
- We recently circulated the latest version of the Milo enhancements list with the User Group, outlining the key changes and immediate improvements we hope to see following go-live day. You can view the list online here

The next meeting of the MUG will be held on Thursday 2nd April. Synovations, the new Milo technology partner, will be attending to answer questions about the build. If you would like to have any particular points discussed at the meeting, please forward them to angus.lindsay@vaslan.org.uk

If you'd like to discuss anything about the new Milo in greater detail, please get in touch with. As always, you can drop an email to milosupport@scvo.org.uk for any Milo issues with the current system.

All the best
Gavin