milo

2015 Training Module 02

Organisations

Version: May 15

Contents

Introduction

Milo holds information about all different types of organisations e.g.:

- Voluntary Organisations
- Statutory Organisations
- Private Companies
- Partnership/Networks
- Educational establishments

These are managed using the **Organisations** object in Milo.

For an Organisation, Milo provides a wide range of fields in which data can be recorded. It also allows a number of **locations** to be linked to the Organisation, where an organisation has a number of offices, shops etc. It also allows **contacts** to be linked to an organisation, holding details of the role and the location at which they work.

Organisation records are the heart of the system. Most other parts of the system interact with organisations in some way, including contacts, volunteer opportunities, interactions and memberships.

Managing Organisations in Milo
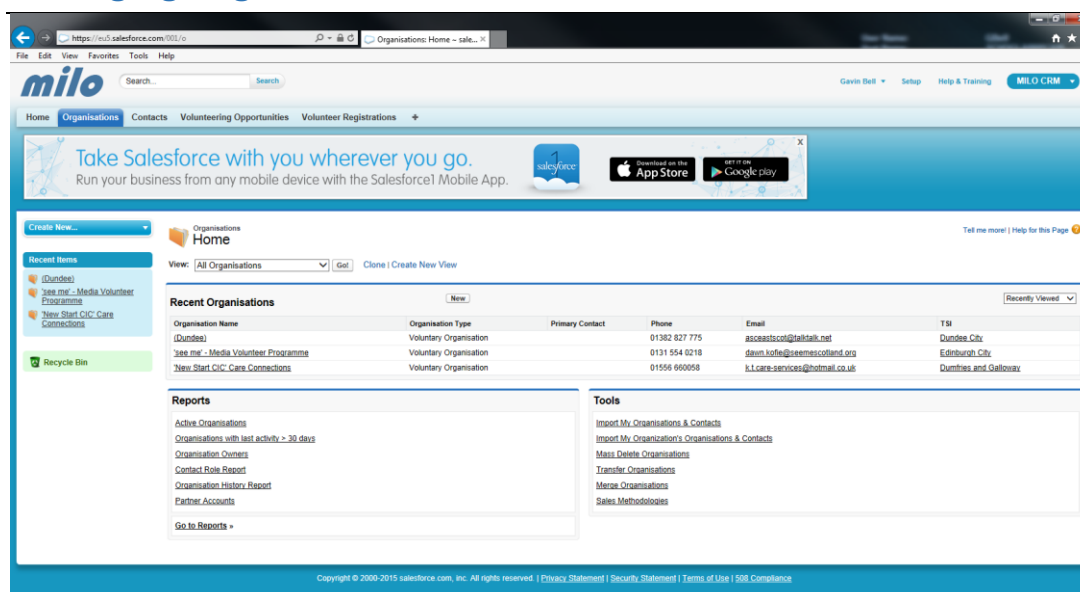
Navigate to Organisations - Home

Click on the Organisations tab at the top of the screen to go to the Organisations home page. By default, you will see a list of recent organisations you have accessed. By clicking on the View dropdown above the list of recent organisations, you can select 'All Organisations', which will provide an alphabetised list of every organisation on the system.

When you create your own views, these will be available from this dropdown.

Search for an organisation

You can search for any record on the database using the Global Search box at the top of every screen.
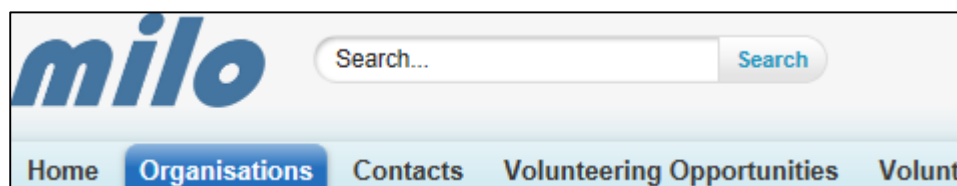
To search for an organisation, simply type the name or part of the name into the search box. You can use * as a wildcard. Try typing 'Pet Fostering'. You will now see any contacts, interactions, organisations, volunteer opportunities or volunteer registrations associated with the search phrase.

Alternatively, you can use views (see module 01) to set up a specific filter for organisations, e.g. all organisations in your TSI area, all organisations flagged as social enterprises. The standard My Organisations view will return all contacts you have accessed recently.

Whichever method you use will return a list of organisations. Click on any of the organisation names to access the record.

View and edit an organisation

When you click into an organisation record, you will see the organisation view screen. As in the old system, data in each record is organised into a number of sections. Scroll down to see the data held on an organisation, broken down into:

- Organisation details
- Basic Profiling Data
- Neighbourhoods Served
- Aims & Objectives
- Policies and Quality Standards

Associated entities are displayed at the bottom of the screen. This is where you can view any **locations**, **contacts**, **volunteering opportunities**, **interactions** or **membership** records associated with the organisation record.

You can also see these entities at the top of the organisation record. Hover the pointer over one of them to see associations, e.g. locations:
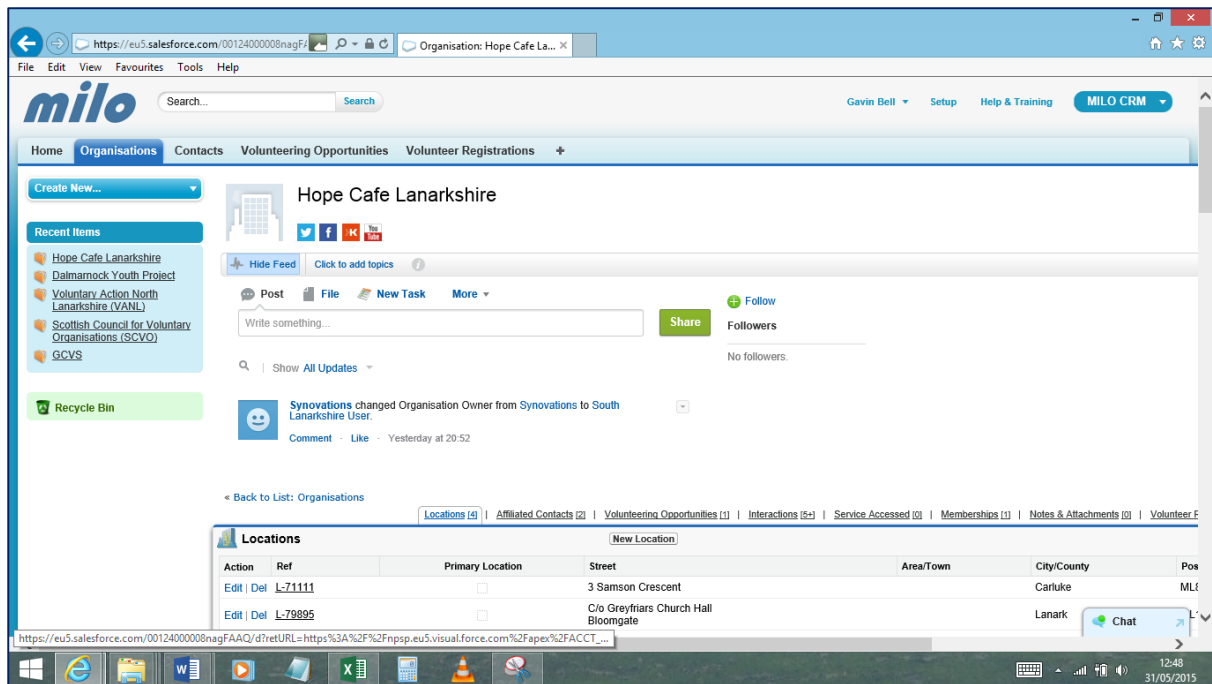
To make changes to an organisation, click on the **Edit** button at the top of the screen.
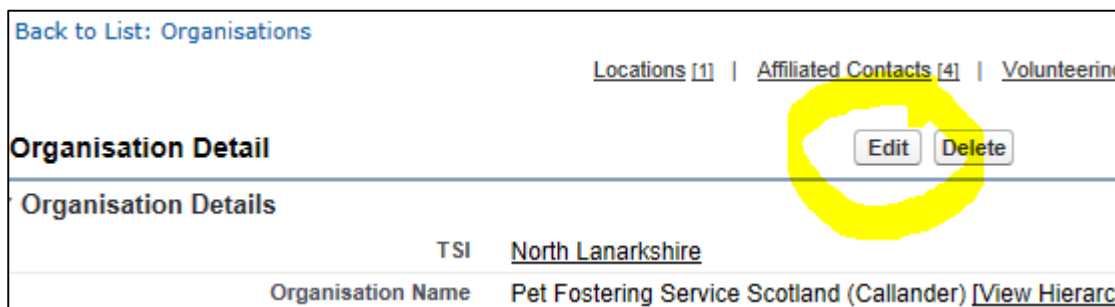
The page will open in edit view, allowing you to update and change any data on the organisation, if you have permission to do so.

Create a new organisation

The easiest way to create any new record is to use the **Create New…** button on the left hand side of the page.

Click on **Create New…** and you will see the option to create a new Event, Task, Organisation, Contact, Volunteering Opportunity, or Volunteer Registration.
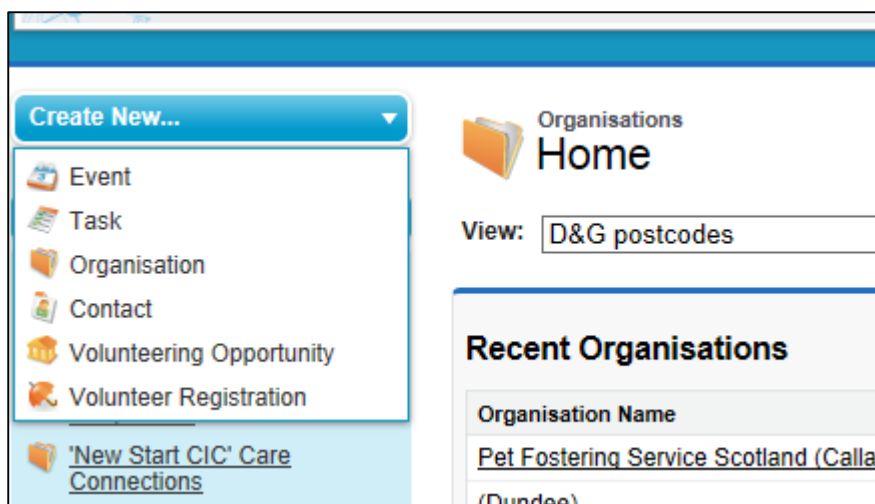
Select **Organisation**, and a New Organisation input page will appear. This looks the same as the edit screen, but is blank to allow you to input a new organisation.

As in the previous system, some fields in each record type are mandatory. These are signified by a red bar next to the mandatory fields. You cannot save until all of these fields have been completed.

Once you have added the mandatory fields plus any other information, click **Save**.

You will then see the view organisation screen as before:

Adding locations, contacts, opportunities etc.

You can now begin associating locations, contacts, etc. with your new organisation. To add a new location hover over 'Locations' and click 'New Location'.

A new edit window opens up displaying the fields available for adding a new location to an organisation record. Complete the details of the location and click save.

You will now see the view location screen for the location you have just created.

Go to **Recent Items** at the side and click back into the organisation record.
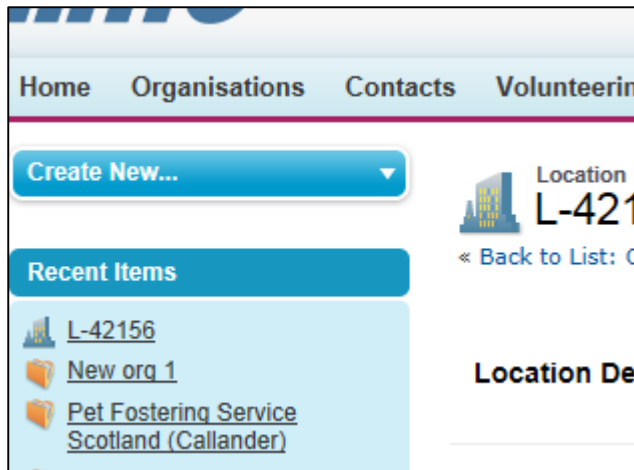
Now look at the Locations object at the top of the record – you will see it now says (1) after the title rather than (0), because you have now added a location. Hover over locations to see a summary of the address, postcode, phone number etc.
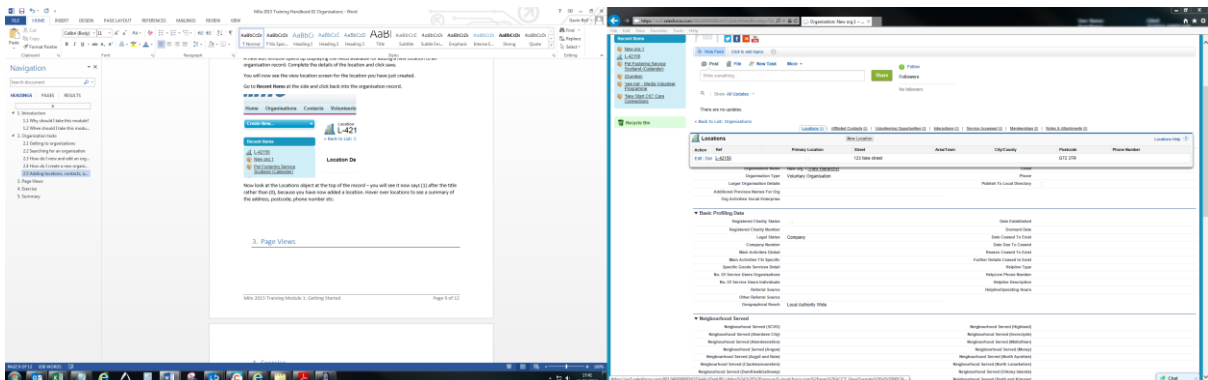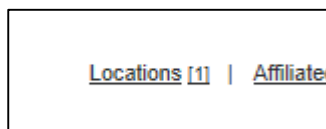
Summary

In the **Organisations** module, we have covered:

- Navigating to the Organisations home screen
- Searching for an organisation
- View/edit organisation records
- Create a new organisation
- Adding locations, contacts, opportunities etc.

These skills are transferrable across the other Milo objects (Volunteer Opportunities, Registrations etc.). You can use the same techniques to navigate around Milo and start to explore the other features Milo has to offer.

Remember – for more step by step advice, see the individual training modules. If you have any problems or get stuck, you can contact the Milo team at milosupport@scvo.org.uk