



2015 Training Module 05

Volunteering Opportunities

Version: May 15

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Introduction

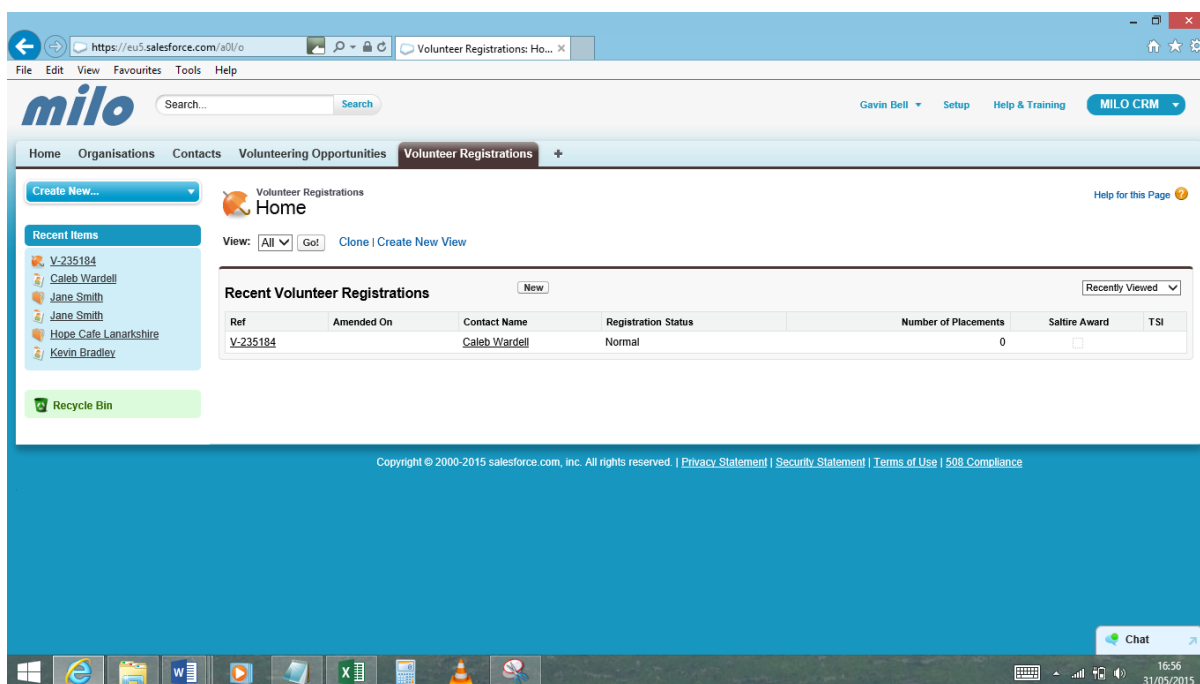
Volunteering opportunities enable users to record the relevant data about a new opportunity. When a volunteering opportunity is created, it is possible to create a placement with a relevant volunteer registration.

Managing Volunteering Opportunities in Milo

Navigate to Volunteering Opportunities - Home

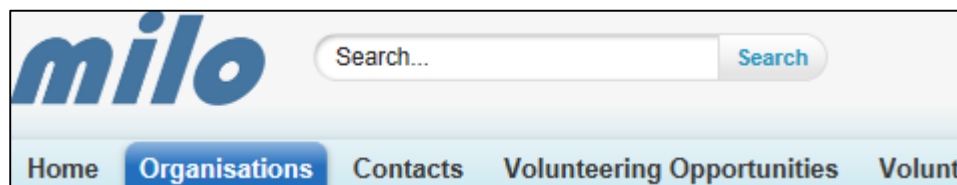
Click on the Volunteering Opportunities tab at the top of the screen to go to the Volunteering Opportunities home page. By default, you will see a list of recent volunteering opportunities you have accessed. By clicking on the View dropdown above the list of recent volunteering opportunities, you can select 'All', which will provide an alphabetised list of every opportunity on the system you have permission to view.

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



Search for a volunteering opportunity

You can search for any record on the database using the Global Search box at the top of every screen.



To search for a volunteering opportunity, simply type the name or part of the name into the search box. You can use * as a wildcard. Try typing 'driver'.

You will now see any contacts, interactions, organisations or volunteer opportunities associated with the search phrase.

Alternatively, you can use views (see module 01) to set up a specific filter for volunteer opportunities, e.g. all opportunities in your TSI area, all opportunities published to website, all opportunities providing experience of administrative work.

Whichever method you use will return a list of volunteer opportunities. Click on any of the contact names to access the record.

Important: there are two clickable links on each record in the list results. The opportunity reference number (Ref) and the name of the organisation hosting the opportunity (Organisation). You access the volunteering opportunity by clicking on the **Ref** number (highlighted below). Clicking on Organisation will take you to the record of the organisation hosting the opportunity.

Recent Volunteering Opportunities					New
Ref	Start Date	Title	Organisation	Location	
<u>VO60142</u>	31/05/2015	Test opportunity 1	<u>VASLan</u>	At Postcode	

[View and edit a volunteering opportunity](#)

When you click into a volunteering opportunity record, you will see the volunteer opportunity 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 a volunteer opportunity, broken down into:

- Main details
- Location details
- Opportunity Dates
- Saltire Award
- Details
- Restriction
- Requirements
- Publication
- Timings
- Insurance
- Training & Support
- Application process

Volunteering Opportunity Detail

Ref	VO60142	TSI / VC Contact
Title	Test opportunity 1	
Status	Open	
Organisation	VASLan	
Organisation Contact	Angus Lindsay	
Owner TSI	South Lanarkshire	

Location Details

Location	AI Postcode	Postcode Area
Use Organisation Postcode	<input type="checkbox"/>	Postcode

Opportunity Dates

Start Date	31/05/2015	Ongoing
End Date		<input checked="" type="checkbox"/>

Saltire Award

Saltire Compatible	<input type="checkbox"/>
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Details

Summary: 422

Chat

As usual, associated entities are displayed at the bottom of the screen. This is where you can view any **volunteer placements** associated with the volunteering opportunity record.

Volunteer Placements

Action	Volunteer Placement: Ref	Ref	Placement Status	Placement Start Date
Edit Del	VP-131198	V-235184	Offered	

Notes & Attachments

No records to display

Always show me [more records per related list](#)

You can also see these entities at the top of the volunteer opportunity record. Hover the pointer over to see details of placements:

[Volunteer Placements \(1\)](#) | [Notes & Attachments \(0\)](#)

[Delete](#) [Clone](#) [Export Job Card \(Conditional\)](#)

The screenshot displays the Milo CRM interface for a volunteer opportunity record. At the top, there are tabs for 'Volunteer Placements (1)' and 'Notes & Attachments (0)'. Below these are buttons for 'Delete', 'Clone', and 'Export Job Card (Conditional)'. The main content area shows the details for a volunteering opportunity with ID 'VO60142'. It includes a 'Volunteer Placements' table with one entry: 'VP-131198' with a reference of 'V-235184' and a status of 'Offered'. The record also shows organization details (VASLan, Anous Lindsay, South Lanarkshire), location details (South Lanarkshire), and opportunity dates (Start Date: 31/05/2015, End Date: Ongoing). A sidebar on the left lists recent items and a 'Recycle Bin' option.

To make changes to a volunteering opportunity, click on the **Edit** button at the top of the screen.

[Edit](#) [Delete](#) [Clone](#) [Info](#)

VO60142

The page will open in edit view, allowing you to update and change any data on the volunteering opportunity, if you have permission to do so.

Volunteering Opportunity Edit VO60142

Volunteering Opportunity Information

Ref: VO60142
 Title:
 Status:
 Organisation: VASLan
 Organisation Contact:
 TSI / VC Contact:

Location Details

Location:
 Postcode:
 Use Organisation Postcode: ☐

Opportunity Dates

Start Date:
 End Date:
 Ongoing: ☒

Saltire Award

Saltire Compatible: ☐

Create a new volunteering opportunity

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

Organisations Home

View:

Recent Organisations

Organisation Name	Organisation Type	Primary Contact	Phone	Email	TS
Pet Fostering Service Scotland (Callander) (Dundee)	Voluntary Organisation		0844 811 9909 OPTION 5 THEN 1	volunteeringwithpss@yahoo.co.uk	No
'see me' - Media Volunteer Programme	Voluntary Organisation		01382 827 775	asceatscot@talktalk.net	Du
'New Start CIC' Care Connections	Voluntary Organisation		0131 554 0218	dawn.kofie@seemesscotland.org	Ed
			01556 660058	k.t.care-services@hotmail.co.uk	Du

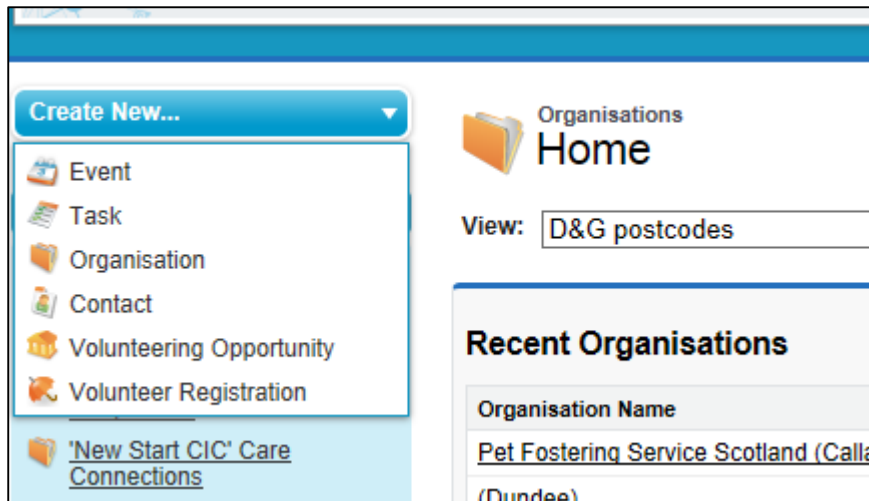
Reports

- [Active Organisations](#)
- [Organisations with last activity > 30 days](#)
- [Organisation Owners](#)
- [Contact Role Report](#)
- [Organisation History Report](#)
- [Partner Accounts](#)
- [Go to Reports »](#)

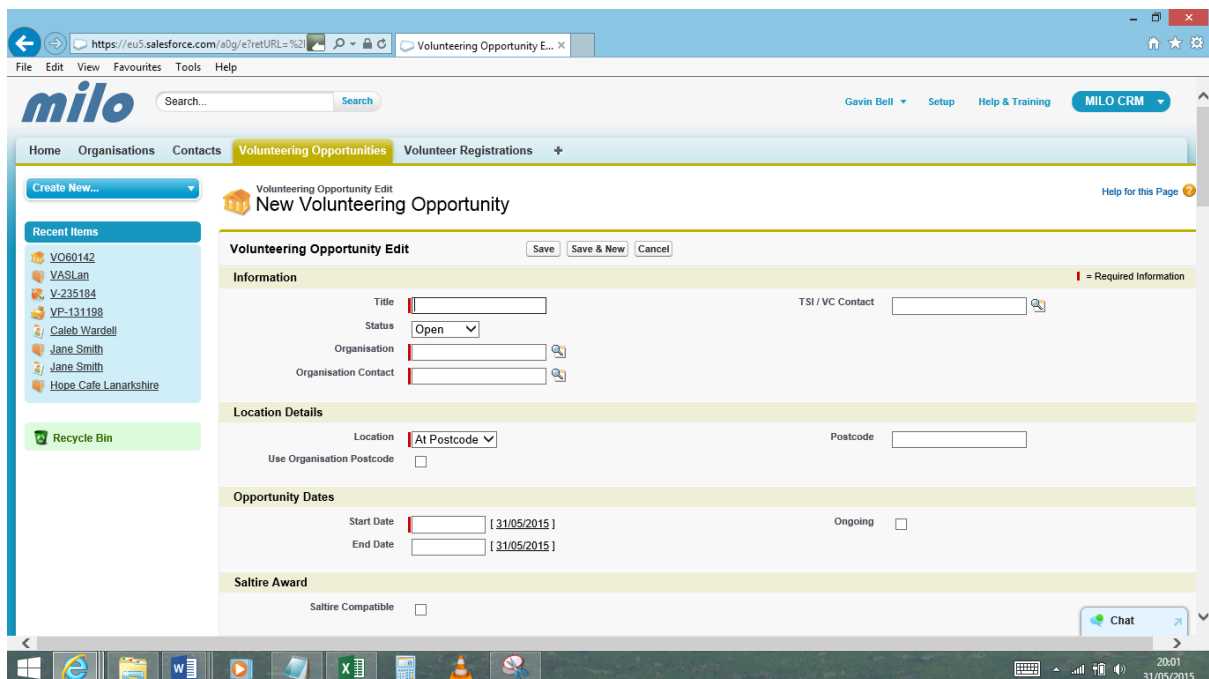
Tools

- [Import My Organisations & Contacts](#)
- [Import My Organization's Organisations & Contacts](#)
- [Mass Delete Organisations](#)
- [Transfer Organisations](#)
- [Merge Organisations](#)
- [Sales Methodologies](#)

Click on **Create New...** and you will see the option to create a new Event, Task, Organisation, Contact, Volunteering Opportunity, or Volunteer Registration.



Select **Volunteering Opportunity**, and a New Volunteering Opportunity input page will appear. This looks the same as the edit screen, but is blank to allow you to input a new volunteering opportunity.



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.

An opportunity must be associated with an existing organisation. To select the organisation you wish to attach a volunteering opportunity to, click on the magnifying glass next to the Organisation field.

Volunteering Opportunity Edit [Save] [Save & New] [Cancel]

Information

Title

Status

Organisation

Organisation Contact

Location Details

Location

Use Organisation Postcode ☐

Opportunity Dates

Start Date

End Date

Saltire Award

☐

Lookup

[Go!]

You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed Organisations

Organisation Name	Organisation Record Type	Organisation Type	Primary Contact
Angus Lindsay			Angus Lindsay
Dalmarnock Youth Project		Voluntary Organisation	

You can select from recently-viewed organisations, or search for another organisation record. Click on the name to add the organisation to the volunteering opportunity.

Once you have added the mandatory fields plus any other information, click **Save**. You will then see the view volunteering opportunity screen as before:

miLO [Search...] [Gavin Bell] [Setup] [Help & Training] [MILO CRM]

Home Organisations Contacts **Volunteering Opportunities** Volunteer Registrations

Create New... [Recent Items]

Volunteering Opportunity VO60142 [Back to List: Volunteering Opportunities] [Customize Page] [Printable View] [Help for this Page]

Volunteer Placements [1] | Notes & Attachments [0]

Volunteering Opportunity Detail [Edit] [Delete] [Clone] [Export Job Card (Conga)]

Ref VO60142 TSI / VC Contact

Title Test opportunity 1

Status Open

Organisation VASLAN

Organisation Contact Angus Lindsay

Owner TSI South Lanarkshire

Location Details

Location At Postcode Postcode Area Postcode

Use Organisation Postcode ☐

Opportunity Dates

Start Date 31/05/2015 Ongoing ☒

End Date

Saltire Award

Saltire Compatible ☐

Details

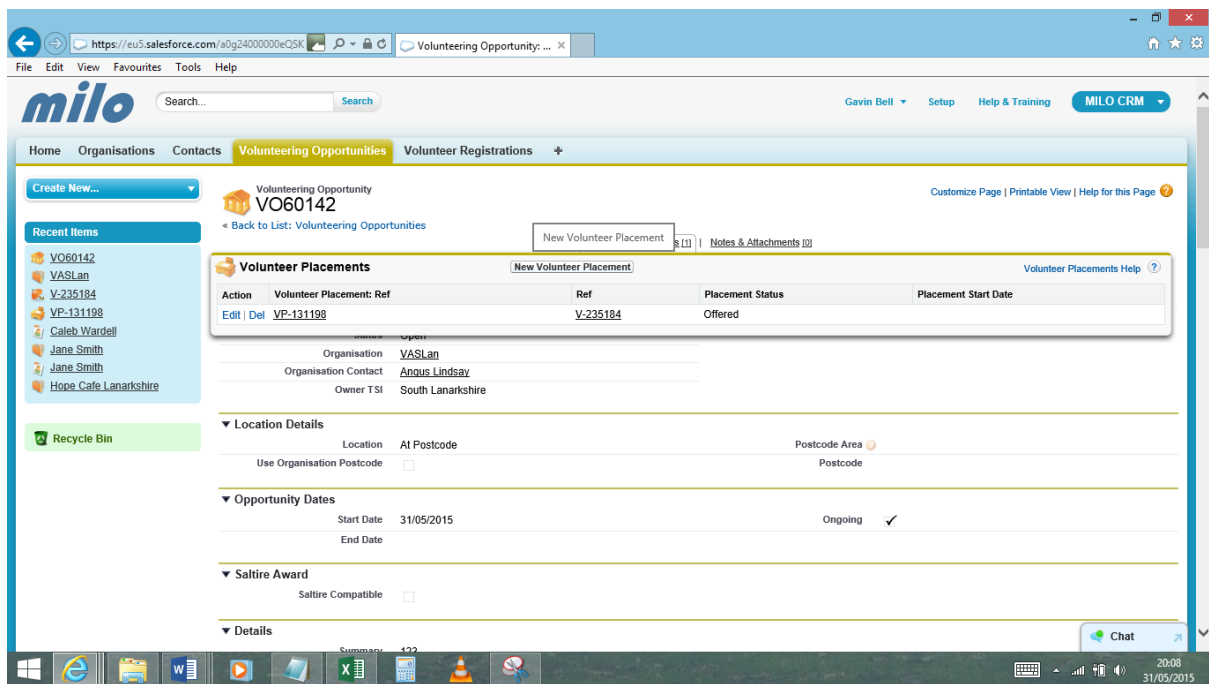
Summary 122 [Chat]

n.b. – you can also attach existing a volunteering opportunity direct from an existing organisation record (see module 01).

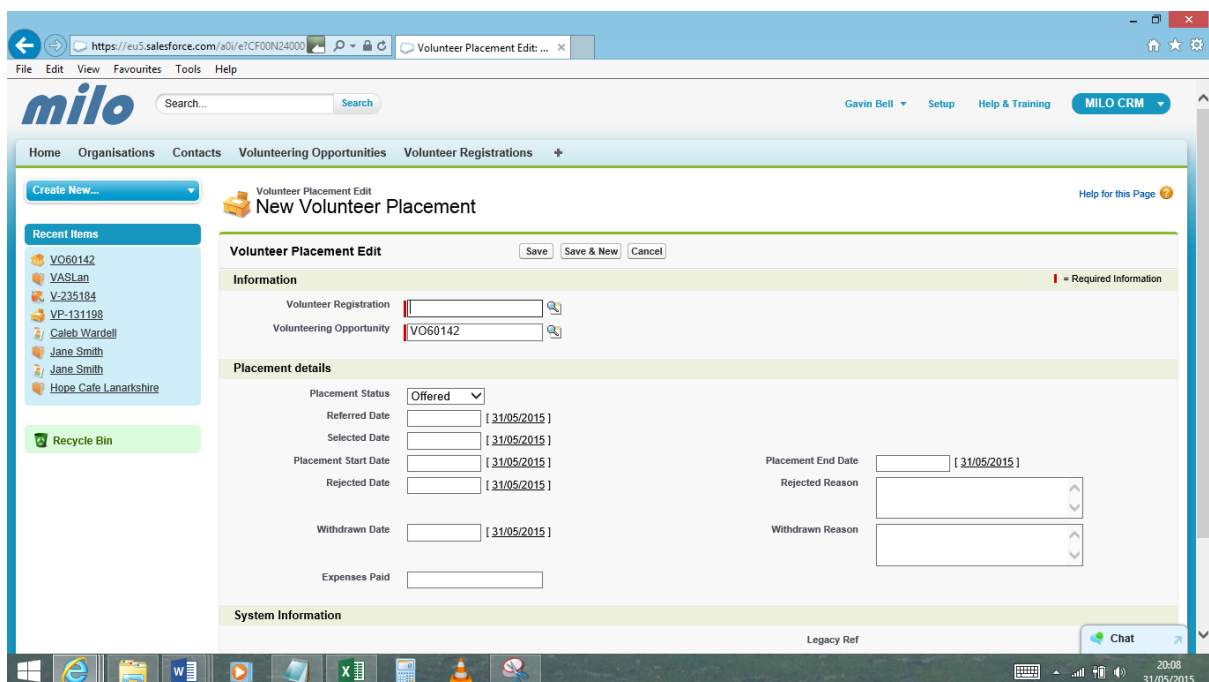
Creating a placement from a volunteering opportunity

A placement is the relationship created when a volunteer is placed with a relevant volunteering opportunity.

To create a placement from a volunteering opportunity, hover over the Volunteer Placements link and click on 'New Volunteer Placement'.



A new edit window opens up displaying the fields available for adding a new volunteer placement to a volunteer opportunity record.



Note that the Volunteer Opportunity number is already filled in.

Click on the magnifying glass next to Volunteering Registration to show a list of registrations you have recently accessed, or alternatively search for another volunteer registration. Click on the ref number to add the relevant volunteer registration to the placement.

Volunteer Placement Edit

Save Save & New Cancel

Information

Volunteer Registration

Volunteering Opportunity

Placement details

Placement Status

Referred Date

Selected Date

Placement Start Date

Rejected Date

Withdrawn Date

Lookup

Go!

You can use * as a wildcard next to other characters to improve your search results.

Recently Viewed Volunteer Registrations

Ref	Amended On	Contact Name	Volunteer Location	Type of Work	Client Gr
Y-235184		Caleb Wardell	[Any]		

Tip: it saves time to select from recent items, so it's a good idea to go into both the volunteer registration and volunteering opportunity records you are working with before you make the placement.

Complete the relevant fields in the placement and click Save.

You will be returned to the volunteering opportunity view page. If you hover over the Volunteer Placements link now, you will see the details of the associated placement and opportunity.

Volunteering Opportunity **VO60142**

Back to List: Volunteering Opportunities

Volunteer Placements

New Volunteer Placement

Action	Volunteer Placement: Ref	Ref	Placement Status	Placement Start Date
Edit Del	VP-131198	Y-235184	Offered	

Organisation: **VASLan**

Organisation Contact: **Anous Lindsay**

Owner TSI: **South Lanarkshire**

Location Details

Location: AI Postcode: Postcode Area:

Use Organisation Postcode: ☐

Opportunity Dates

Start Date: **31/05/2015** Ongoing: ☒

End Date:

Saltire Award

Saltire Compatible: ☐

n.b. you can also create a placement direct from a Volunteer Registration record – see module 04 for details.

Summary

In the **Volunteering Opportunity** module, we have covered:

- Navigating to the Volunteering Opportunity home screen
- Searching for a volunteering opportunity
- View/edit volunteering opportunity records
- Create a new volunteering opportunity
- Creating a placement from volunteering opportunity

These skills are transferrable across the other Milo objects (Organisations, Volunteering 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