milo

2015 Training Module 05

Volunteering Opportunities

Version: May 15

Contents

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

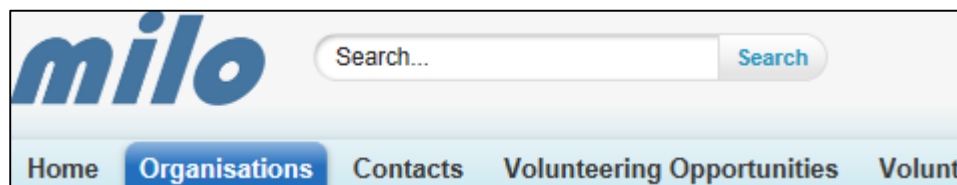## Navigate to Volunteering Opportunities - Home

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.
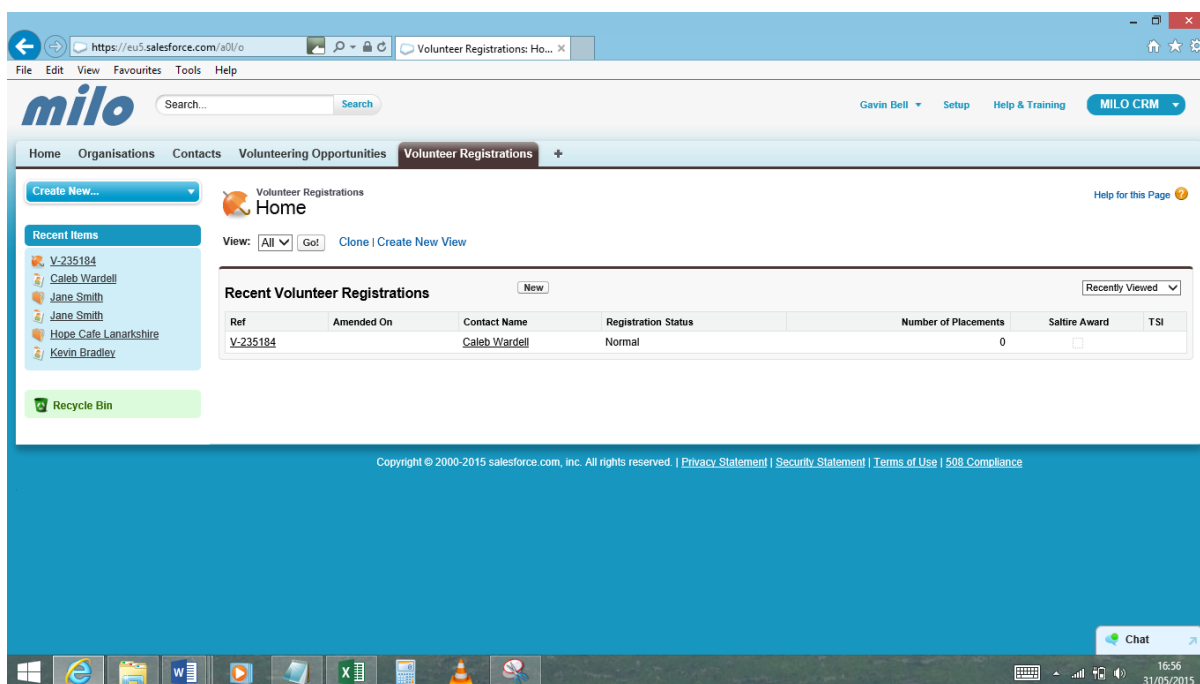
Search for a volunteering opportunity

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 <u>two</u> 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	
VO60142	31/05/2015	Test opportunity 1	VASLan	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

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.

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

To make changes to a volunteering opportunity, 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 volunteering opportunity, if you have permission to do so.

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.

Click on **Create New…** and you will see the option to create a new Event, Task, Organisation, Contact, Volunteering Opportunity, or Volunteer Registration.
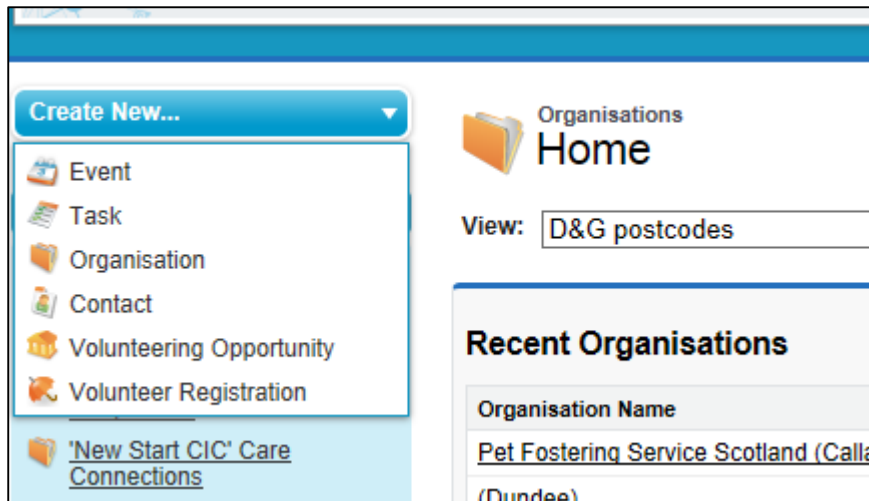
Select **Volunteering Opportunity**, and a New Volunteering Opportunity input page will appear. This looks the same as the edit screen, but is blank to allow you to input a new volunteering opportunity.
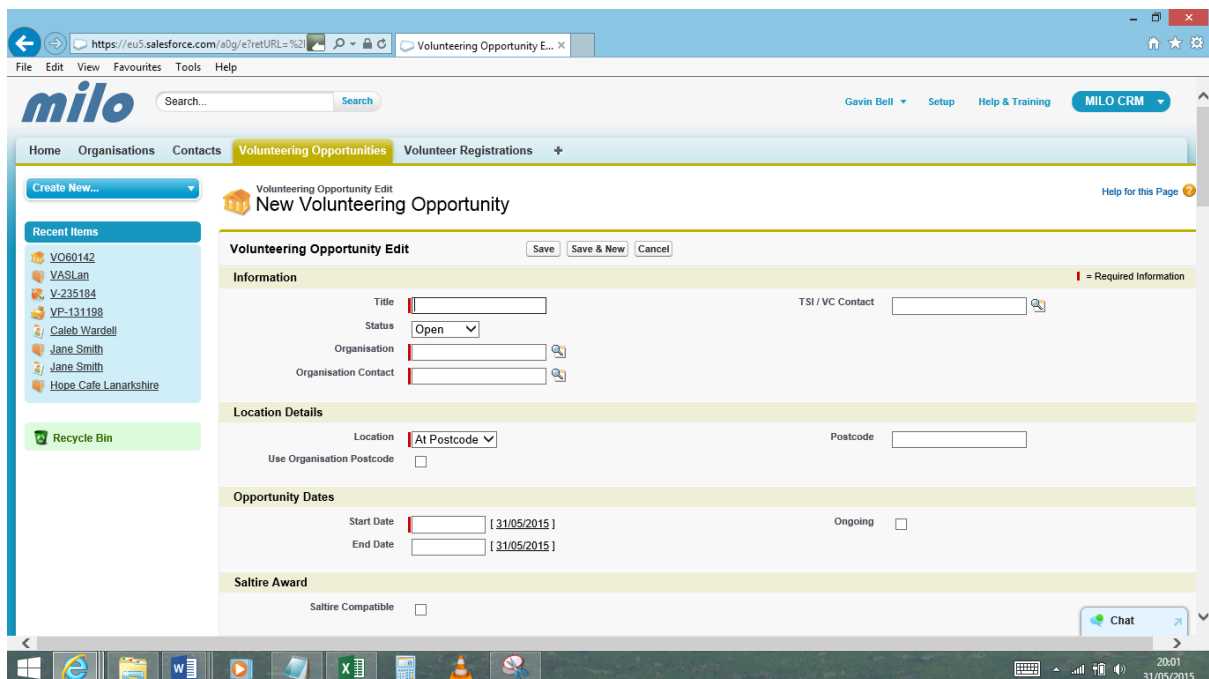
As in the previous system, some fields in each record type are mandatory. These are signified by a red bar next to the mandatory fields. You cannot save until all of these fields have been completed.

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.

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:


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'.
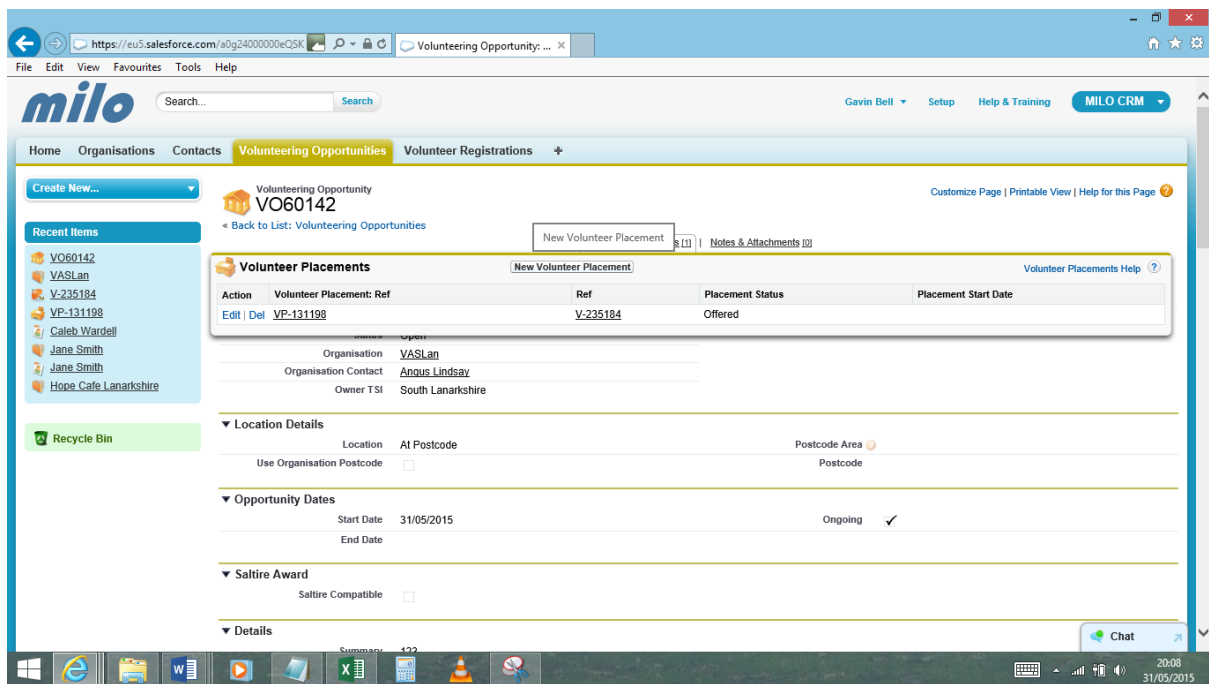
A new edit window opens up displaying the fields available for adding a new volunteer placement to a volunteer opportunity record.
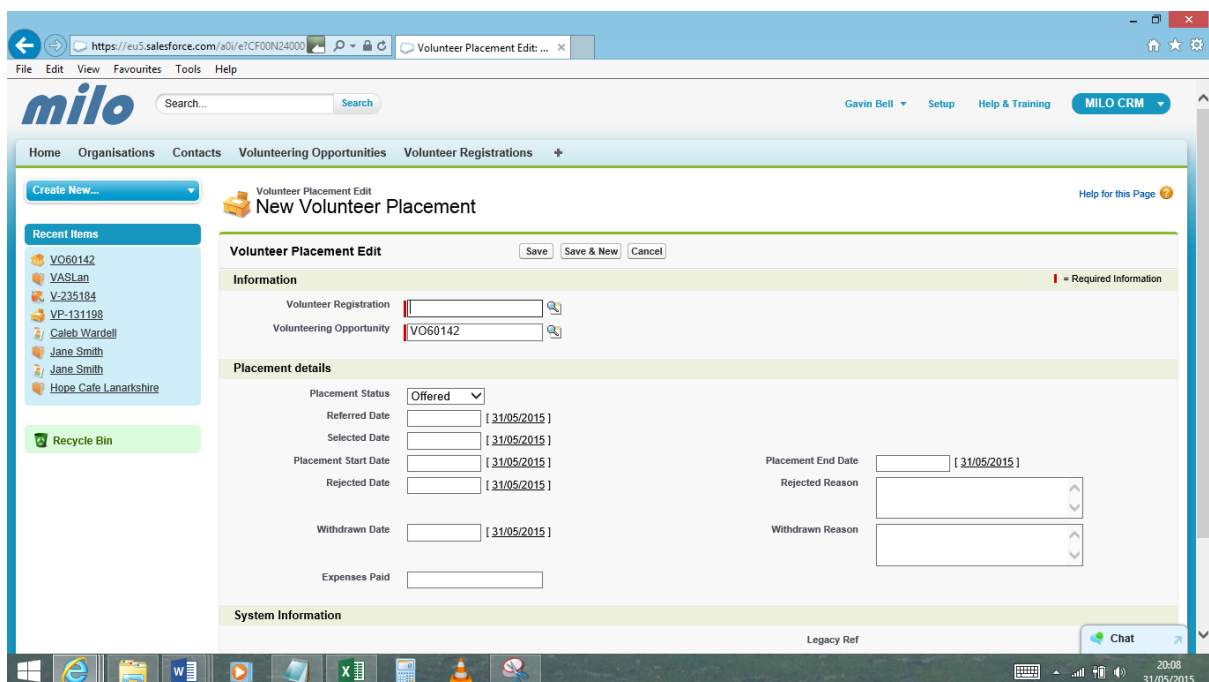
Note that the Volunteer Opportunity number is already filled in.

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.

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.

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