



## Milo update: 8 May 2015

Dear colleagues

It's now **less than two weeks** until the deadline for last input to the old system before migration to the Salesforce takes place in the last week of May.

Here's a reminder of the key dates:

- **Last input to old system: 12pm on Friday 22 May 2015**  
A final cut of data from the old system will be taken on the afternoon of 22/5/15 to migrate to the new system. The old system will remain available after this time, but any data input will not be migrated to the new system.
- **New system available: Monday 1st June 2015**  
The new system will be available with all organisations, volunteers, opportunities updated before the data entry cutoff date
- **Old system goes offline: Tuesday 30th June 2015**  
The original Milo system will remain available up until 30th June, when our support contract with Sopra and hosting contract with Pulsant expire. Thereafter, it will not be possible to access the old system.

### Test users

We have more advance users on the system, mostly drawn from the Milo User Group. Early next week, we aim to get all remaining TSI leads set up with a login to the test system to give them a chance to get used to the look and feel of the new system.

### 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.

Thank you to everyone who completed the user IDs survey – we're currently looking at the allocation of licences we'll be able to provide each TSI and will be in touch soon to discuss.

## Interaction categories and neighbourhoods

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.

Milo leads should all have received a communication this week asking them to tell us what **interaction categories** and **neighbourhoods** you would like set up for go live – please make sure these are returned by next Friday to ensure we can set up the new values as you want them. They won't be set in stone and you will be able to change them later if necessary.

## TSI-defined fields

TSI defined fields **will not be migrated** to the new system. The bulk of TSIs have made little or no use of these additional fields, but if you do currently use any TSI defined fields, please get in touch to discuss if there's a way to retain this data.

## Training materials

Training materials will be available online in advance of go-live. A link will be sent to all Milo leads. The main principles of the system are not changing, so it should be straightforward for most existing users, however the Milo team will be standing by to provide extra help and support by phone and email where necessary.

## Milo new system FAQ

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](mailto:gavin.bell@scvo.org.uk)

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

All the best

Gavin