



2015 Training Module 04

Volunteer Registrations

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Introduction

Volunteer registrations enable users to record the relevant data about a volunteer. When a volunteer registration is created, it is possible to create a placement on a relevant volunteer opportunity.

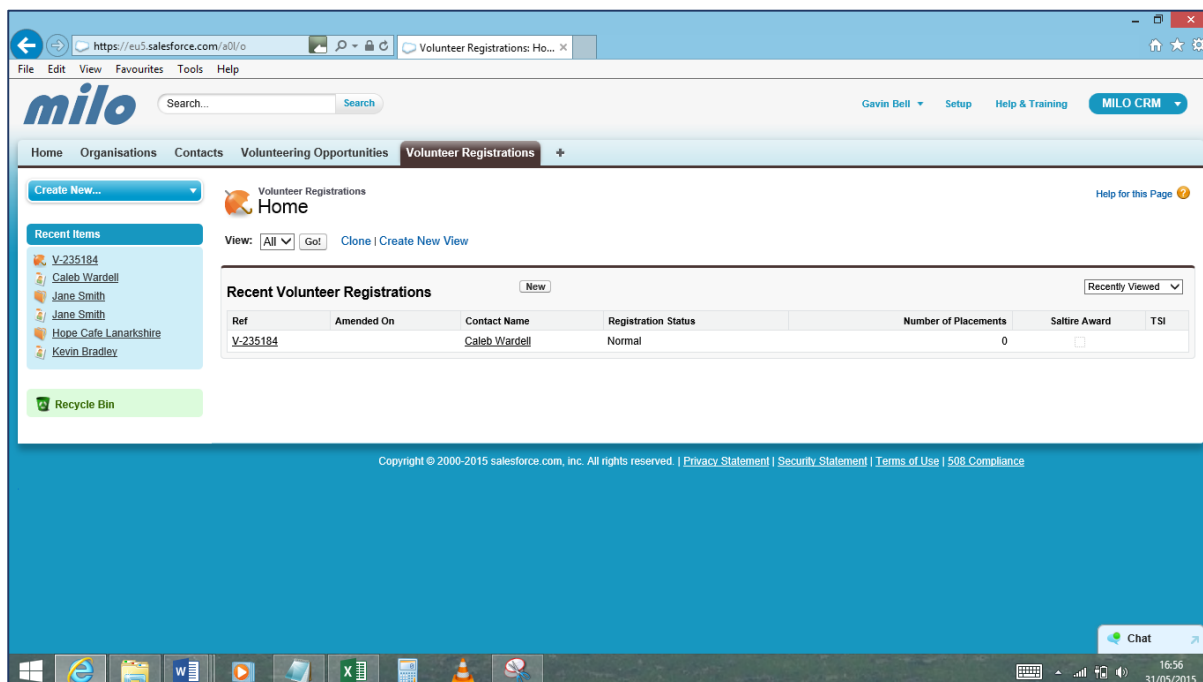
Volunteer registrations cannot be created without an associated contact record. Because volunteer registrations contain potentially sensitive data about individuals, they cannot be viewed by unauthorised users (e.g. staff from other TSIs).

Managing Volunteer Registrations in Milo

Navigate to Volunteer Registrations - Home

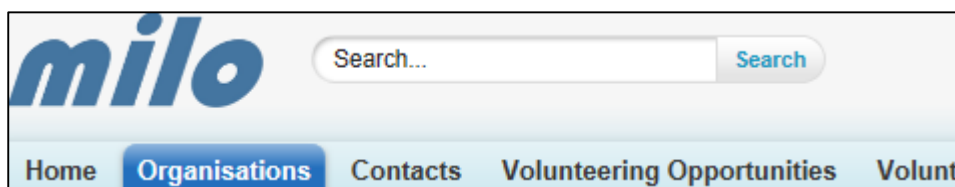
Click on the Volunteer Registrations tab at the top of the screen to go to the Volunteer Registrations home page. By default, you will see a list of recent volunteer registrations you have accessed. By clicking on the View dropdown above the list of recent volunteer registrations, you can select 'All', which will provide an alphabetised list of every vol reg on the system you have permission to view.

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



Search for a volunteer registration

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



To search for a volunteer registration, simply type the name or part of the name into the search box. You can use * as a wildcard. Try typing 'Jane Smith'.

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

Alternatively, you can use views (see module 01) to set up a specific filter for volunteer registrations, e.g. all volunteers in your TSI area, all Saltire registered volunteers, all volunteers from a particular school.

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

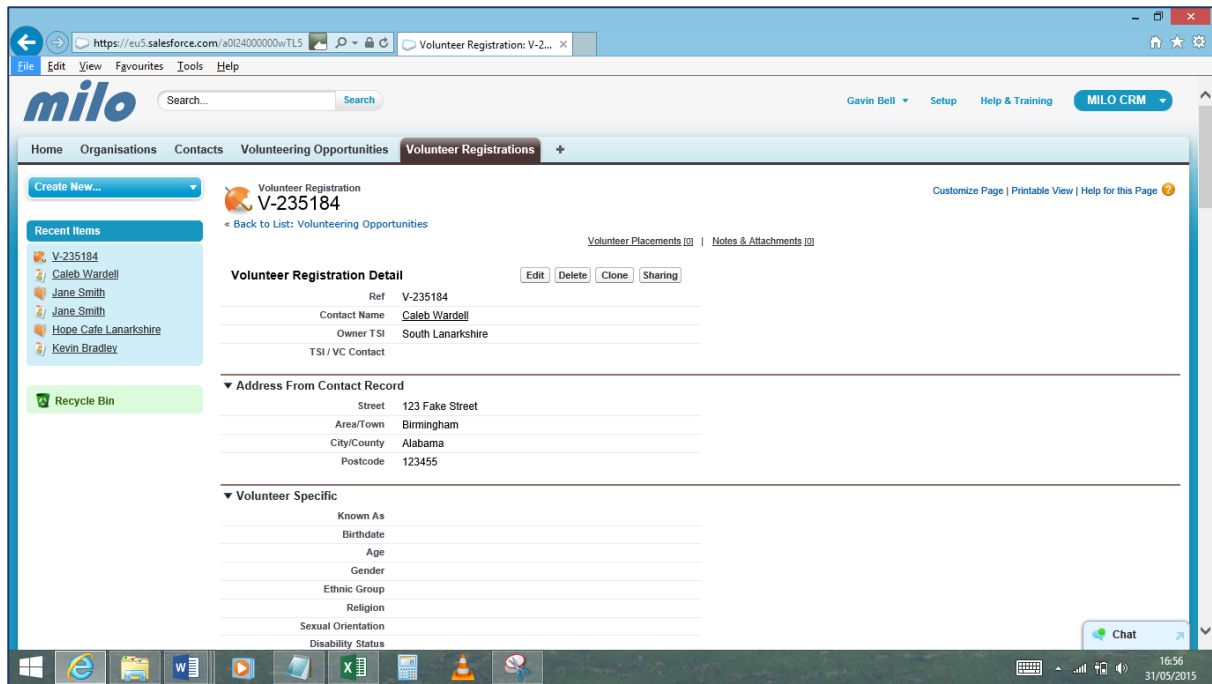
Important: there are two clickable links on each record in the list results. The reference number (Ref) and the name of the volunteer (Contact Name). You access the volunteer registration by clicking on the **Ref** number (highlighted below). Clicking on Contact Name will take you to the contact record itself.

Recent Volunteer Registrations				New
Ref	Amended On	Contact Name	Registration Status	
V-235184		Caleb Wardell	Normal	

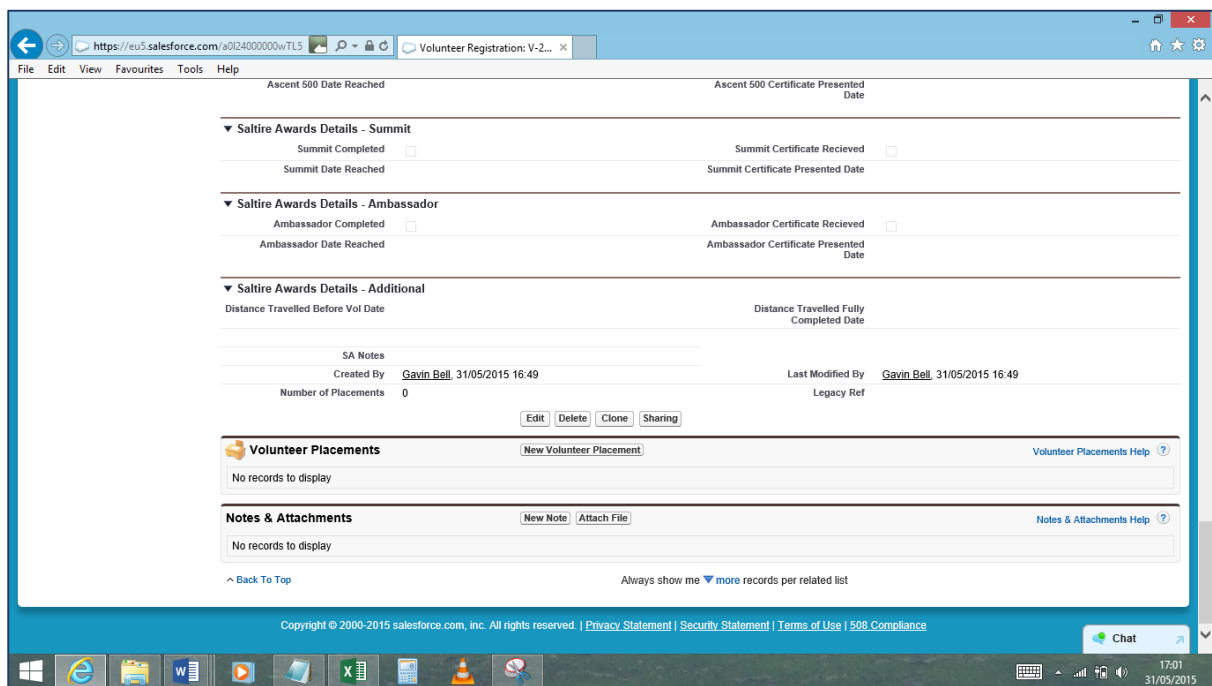
[View and edit a volunteer registration](#)

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

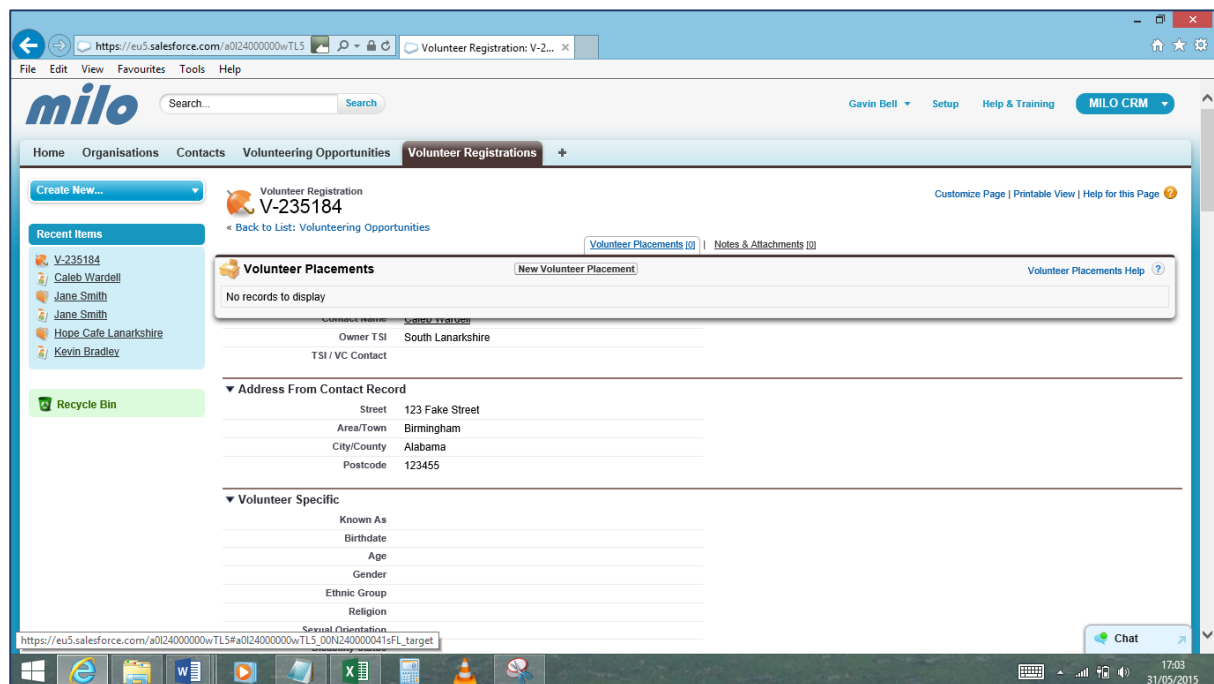
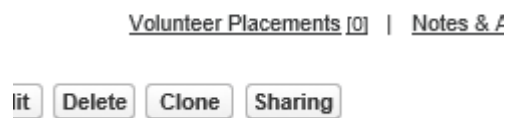
- Main details
- Address (read-only, imported from contact record)
- Volunteer Specific data
- Main details (registration)
- Groupings, Projects and Additional Information
- Support Needs
- Other Contacts and Why Volunteer
- Mentor Details
- Beneficiary/Client Group
- Type of Work and Skills
- Availability
- Saltire details



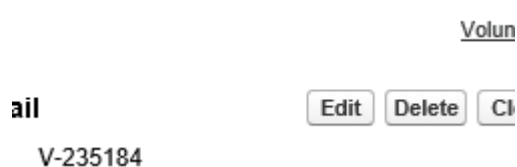
Associated entities are displayed at the bottom of the screen. This is where you can view any **volunteer placements** associated with the volunteer registration record.



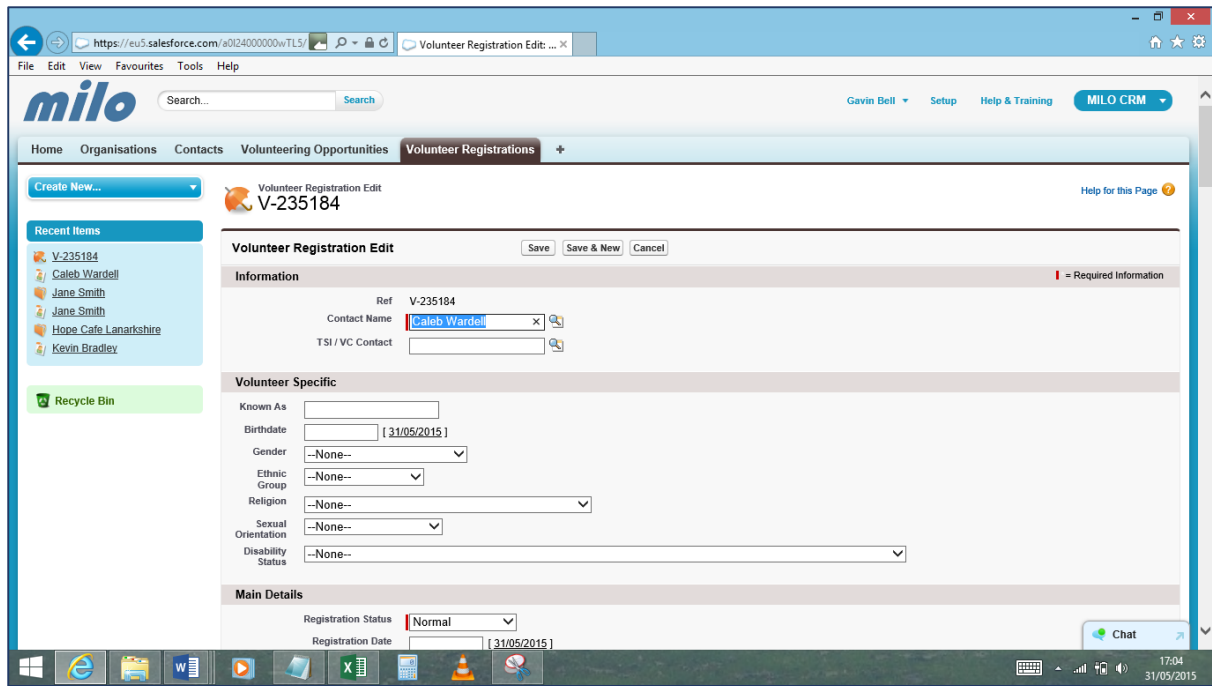
You can also see these entities at the top of the volunteer registration record. Hover the pointer over to see details of placements:



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

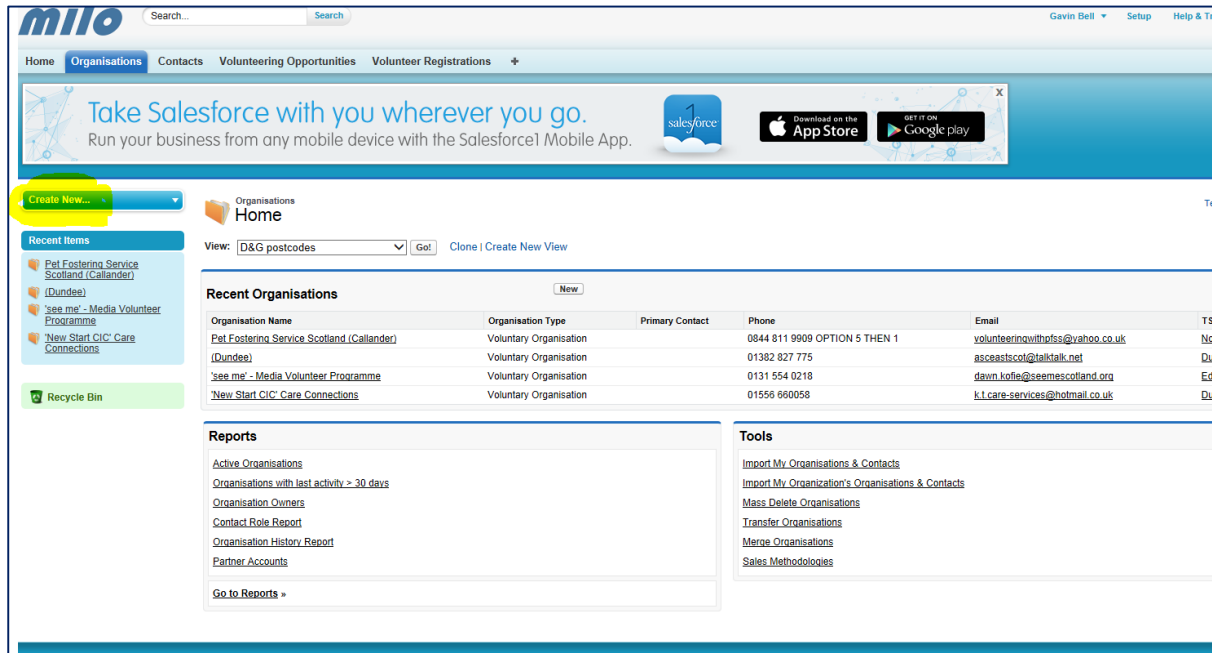


The page will open in edit view, allowing you to update and change any data on the volunteer registration, if you have permission to do so.

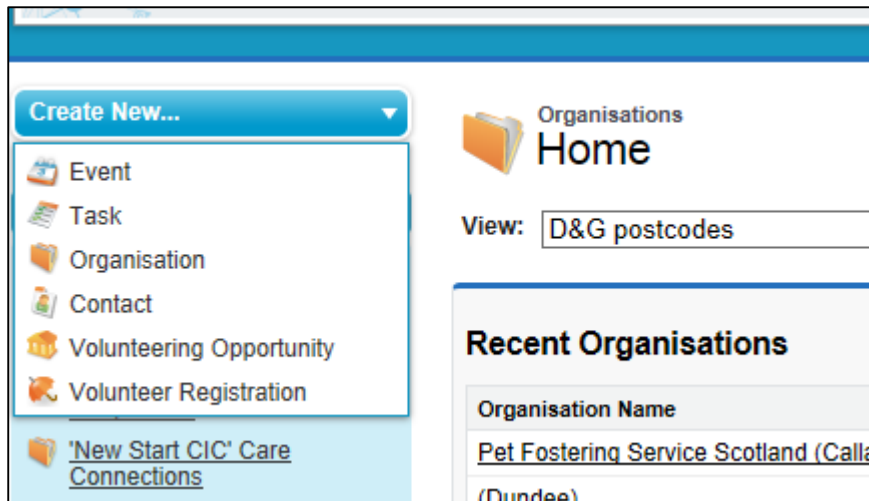


Create a new volunteer registration

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



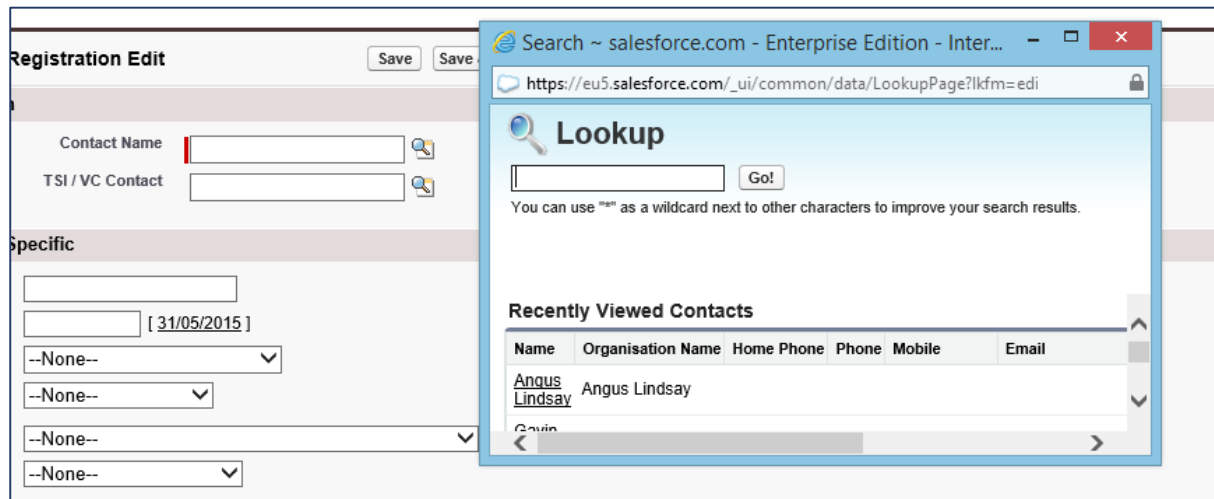
Click on **Create New...** and you will see the option to create a new Event, Task, Organisation, Contact, Volunteering Opportunity, or Volunteer Registration.



Select **Volunteer Registration**, and a New Volunteer Registration input page will appear. This looks the same as the edit screen, but is blank to allow you to input a new volunteer registration.

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.

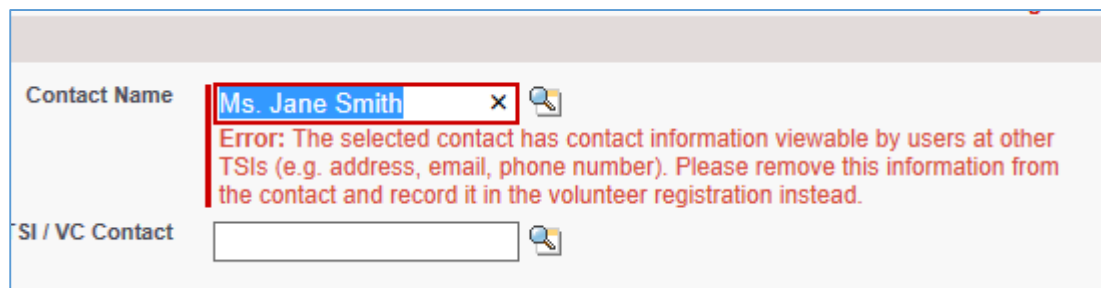
To select the contact you wish to attach a volunteer registration to, click on the magnifying glass next to Contact Name.



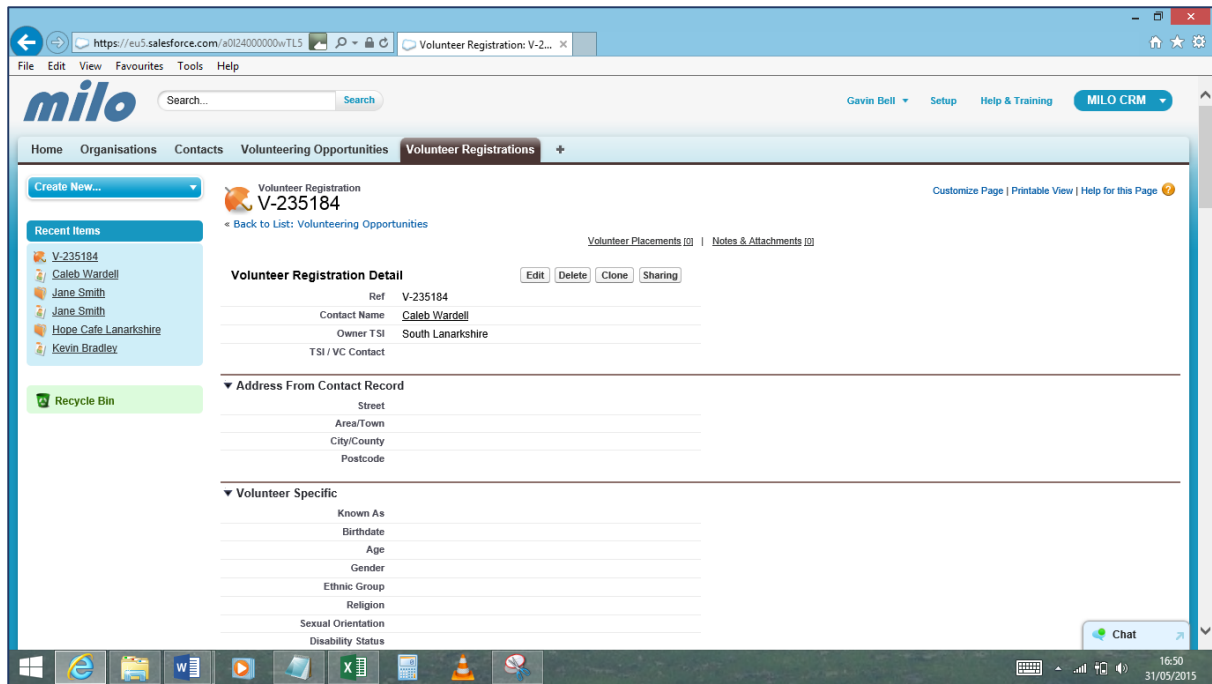
You can select from recently-viewed contacts, or search for another contact record. Click on the name to attach the contact to the volunteer registration.

Note: make sure the contact you wish to attach the volunteer record is marked as a Volunteer in the contact category, and that there are no address, phone or email details in the contact record itself.

Address details for any volunteer should be saved in the registration itself, not the contact record. If you try to save a volunteer registration attached to a contact with a personal address or phone number, you get the following error:



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

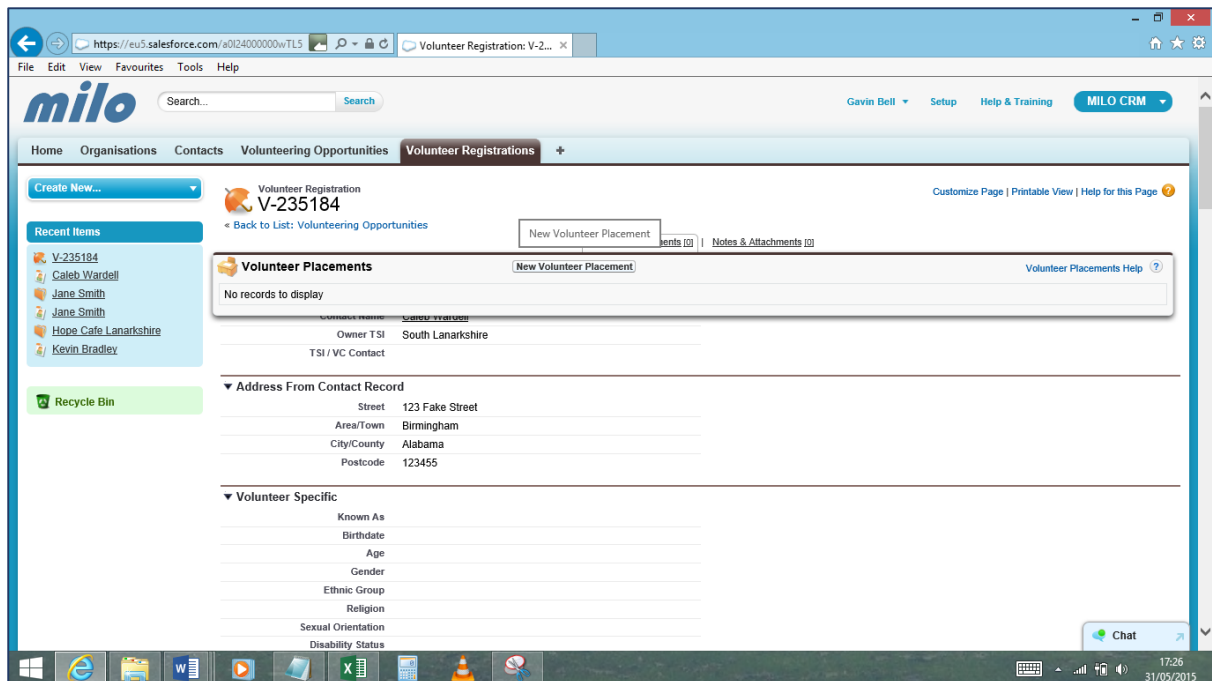


n.b. – you can also attach existing a volunteer registration direct from an existing contact record (see module 03).

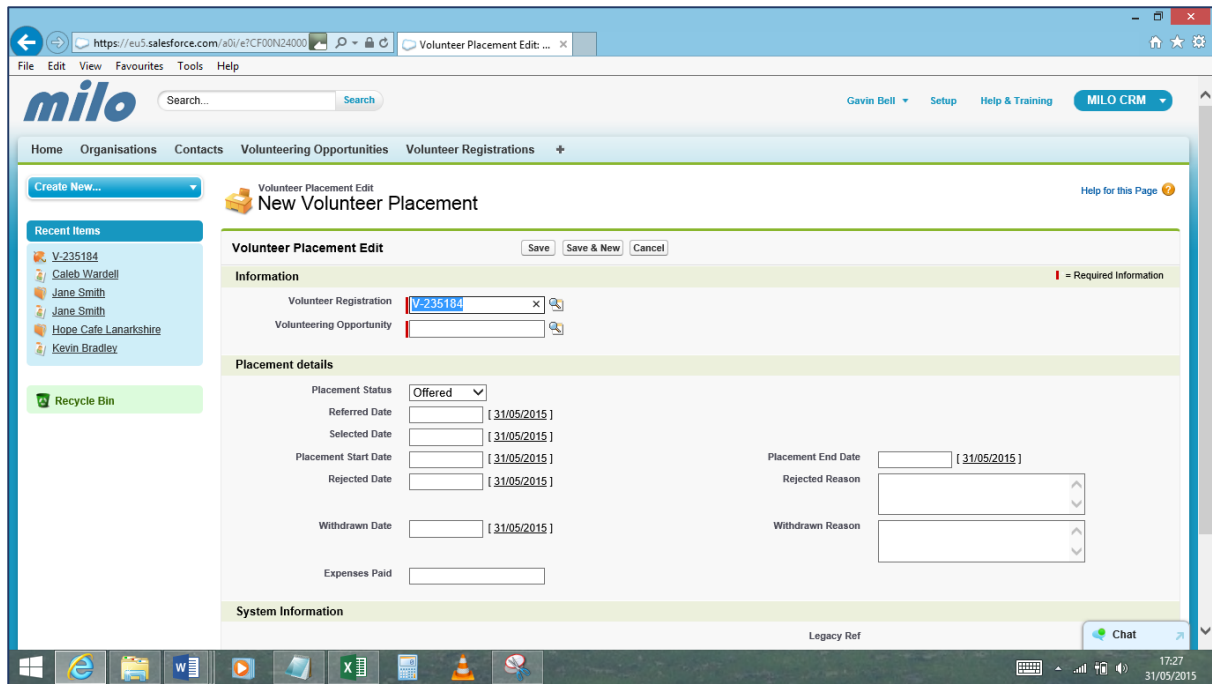
Creating a placement from volunteer registration

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

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

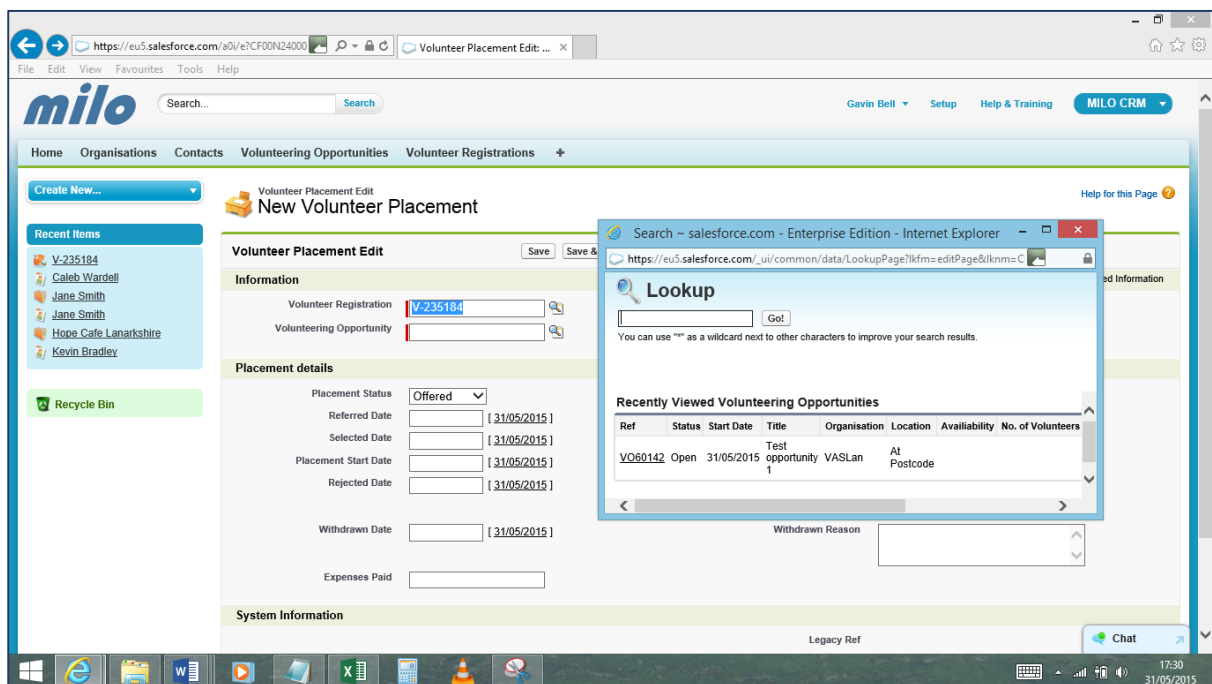


A new edit window opens up displaying the fields available for adding a new volunteer placement to a volunteer registration record.



Note that the Volunteer Registration number is already filled in.

Click on the magnifying glass next to Volunteering Opportunity to show a list of opportunities you have recently accessed, or alternatively search for another opportunity. Click on the ref number to add the relevant opportunity 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 before you make the placement.

Complete the relevant fields in the placement and click Save.

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

The screenshot displays the Milo CRM interface for Volunteer Registrations. The left sidebar lists recent items, including a registration (V-235184) and several volunteer placements (VP-131198, VO60142). The main area shows the details for registration V-235184, including a table of volunteer placements. One placement is listed with reference VO60142 and status 'Offered'. Below the table, there are sections for contact address and volunteer-specific information.

Action	Volunteer Placement: Ref	Ref	Opportunity Title	Placement Status	Placement Start Date	Placement End Date
Edit Del	VP-131198	VO60142	Test opportunity 1	Offered		

Address From Contact Record

Street: 123 Fake Street
Area/Town: Birmingham
City/Country: Alabama
Postcode: 123455

Volunteer Specific

Known As: _____
Birthdate: _____
Age: _____
Gender: _____
Ethnic Group: _____
Religion: _____
Sexual Orientation: _____

n.b. you can also create a placement direct from a Volunteering Opportunity record – see module 05 for details.

Summary

In the **Volunteer Registration** module, we have covered:

- Navigating to the Volunteer Registration home screen
- Searching for a volunteer registration
- View/edit volunteer registration records
- Create a new volunteer registration
- Creating a placement from volunteer registration

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