



COMPASS
Helping you keep track of Scouting

User guide: ending a provisional role

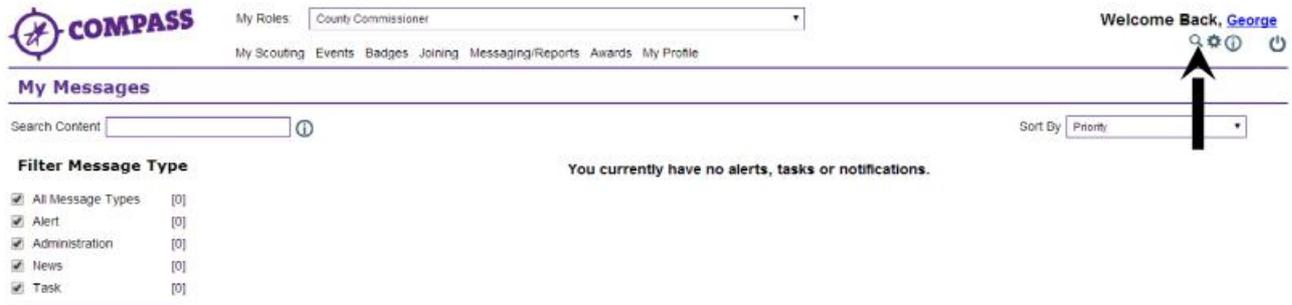
Roles: Appointment Secretaries, Administrators, District Commissioners, County Commissioners

Process overview: This process allows users to end a member's provisional role. This would be done if a member is not continuing past the provisional stage of the Appointments Process or if they have decided not to continue with this role.

Process: ending a provisional role

Ensure you have the correct role selected from the 'My roles' selector at the top of the page. (This will be the role that gives you the appropriate access rights to complete this process.)

- 1 Hover over the magnifying glass symbol located at the top right of the homepage.



- 2 Type the membership number of the member you wish to find into the 'Go to member' box, then click the magnifying glass next to the box. If you do not know the membership number, you can use the basic or advanced search options instead. (Please see the separate user guides for using the '[Basic search](#)' or '[Advanced search](#)'.)



- 3 On the member's profile page there will be a row of headings underneath the member's name and membership number. Click the 'Roles' heading.
- 4 The 'Roles' page will display all the member's active roles. The status each role will be displayed under the 'Status' heading.



- Find the provisional role that you want to close. At the right hand side of the page, there will be an 'Edit' button; click the 'Edit' button next to this role.

The screenshot shows the COMPASS system interface. At the top, there is a navigation bar with the COMPASS logo and user information: "My Roles: 00956007 Kirsty Demo" and "Welcome Back, George". Below this is a menu with options like "My Settings", "Details", "Badges", "Joining", "Training", "Messages/Reports", "Awards", "My Profile", and "System Admin". The main content area displays a table of roles for the user "00956007 Kirsty Demo". The table has columns for Role, Class, Location, Start Date, End Date, Status, and Options. Two roles are listed: "Section Leader (Primary)" and "Group Scout Leader". The "Group Scout Leader" role is marked as "Provisional". A black arrow points to the "Edit" button in the Options column for the "Group Scout Leader" role.

- A popup window will appear. At the bottom of the window is the 'End Date' box. Enter the end date of the provisional role into the box.

The screenshot shows a popup window titled "Edit Member Role" for user "00956007 Kirsty Demo : Group Scout Leader". The window is divided into two sections: "New Role Details" and "Member Role Details". The "Member Role Details" section contains several fields, including "Member Number", "Organisation", "Country", "Region", "County", "District", "Group", "Group Section", "Replace Existing Role", "Role", "Role Variants", "Visible Role Title", "Start Date", and "End Date (This is a prior role)". The "End Date" field is highlighted with a black arrow. The "End Date" field is currently empty, and the "Start Date" field is set to "14 April 2014". At the bottom of the window, there are buttons for "Close", "Reset", "Save", and "Next".

- Click 'Save' at the bottom right of the window to close the role. There is no confirmation so make sure that you have entered the correct information before clicking 'Save'.

- If the Member has other active roles in your hierarchy you will be return to the member's 'Roles' page. The role you ended will now be displayed as 'Closed' under the 'Status' heading.

Role	Class	Location	Start Date	End Date	Status	Options
Section Leader (Primary)	Leader	Scout 2 @ Compass Group	29 April 2014		Full	Edit End
Group Scout Leader	Commissioner	Compass Group	14 April 2014	27 May 2014	Closed	View

If the member has no other active roles in your hierarchy, once the role has been ended you will be unable to access the member's profile.

If the member has no other active roles in Scouting, when you click 'Save', you will see a message saying: 'This role has been closed. The member has no other active roles so their membership status has been set to inactive'.