



User guide: adding mandatory ongoing learning for multiple members

Roles: Training Managers, Training Administrators, line managers.

Process overview: This process will allow users with the correct access rights to search for multiple members and add mandatory ongoing learning to their training records at the same time.

It allows members to record:

- Module title.
- Any notes.
- Date of training.

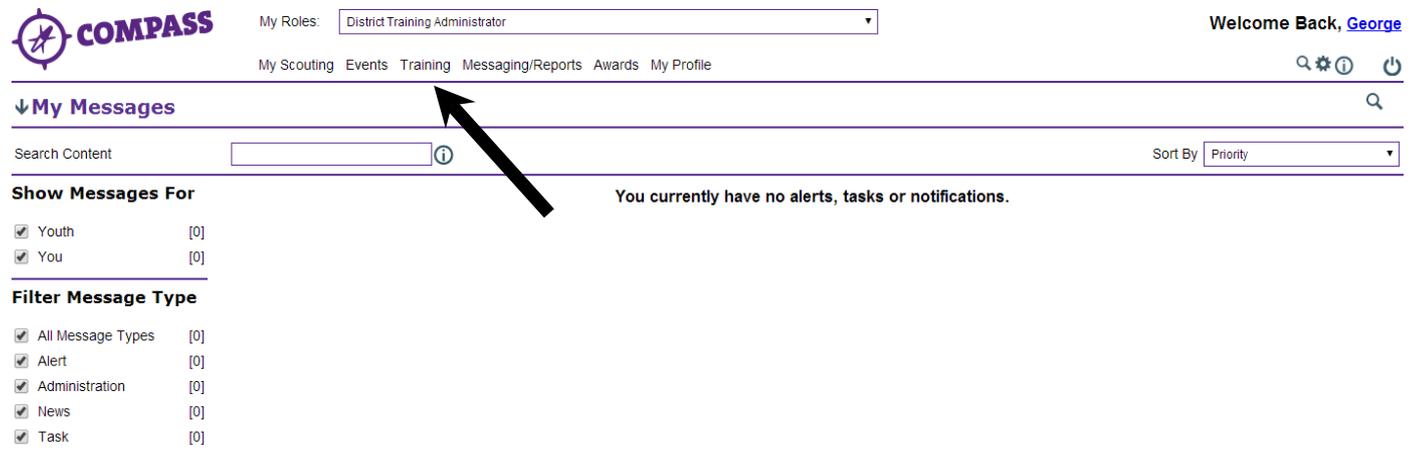
By enabling multiple members' records to be updated at the same time, it makes it easier to carry out tasks such as updating the records of all of the participants of the same course in one go.

Please note: 'Mandatory ongoing learning' is learning that members with relevant roles are required to complete periodically to ensure the safety of members in Scouting. This should be checked at the point of review by their line manager and may include safety, safeguarding and first aid training. Mandatory ongoing learning differs from 'ongoing learning hours', which refers to any training, learning or development that an adult member can use in their Scouting role. Adding ongoing learning hours to a single member's record is covered in ['Adding ongoing learning for multiple members.'](#)

If a member completes another module within the Adult Training Scheme that also fulfils the requirements for mandatory ongoing learning, this will automatically be reflected in their training record. For example, if a learner completes Module 1: Essential Information, this counts as the ongoing learning requirement for both safety and safeguarding. When this is added to a PLP within their training record, the mandatory ongoing learning section of their record will automatically be updated as well.

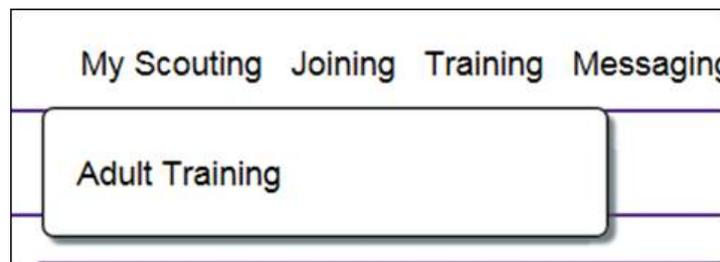
Process: adding mandatory ongoing learning for multiple members

- 1 Ensure you have selected the correct role from the 'My roles' dropdown menu at the top on the homepage. (This will be the role that gives you the appropriate access rights to complete this process.)
- 2 Click on the 'Training' heading towards the top of the homepage.



The screenshot shows the COMPASS user interface. At the top left is the COMPASS logo. To its right is a 'My Roles' dropdown menu set to 'District Training Administrator'. Further right is a 'Welcome Back, George' message and a search icon. Below this is a navigation bar with 'My Scouting', 'Events', 'Training', 'Messaging/Reports', 'Awards', and 'My Profile'. The 'Training' link is highlighted with a red arrow. Below the navigation bar is a 'My Messages' section with a search box and a 'Sort By' dropdown set to 'Priority'. A message status indicates 'You currently have no alerts, tasks or notifications.' Below this are sections for 'Show Messages For' (Youth [0], You [0]) and 'Filter Message Type' (All Message Types [0], Alert [0], Administration [0], News [0], Task [0]).

- 3 A menu will appear underneath. Click on 'Adult training'.



- 4 The 'Adult training' page will appear. This page will allow you to search for members using a combination of different search criteria.

Complete the search fields relevant to your search.

- **Module Details** – This section allows you to search for a specific module or specific requirements. Use the 'Update' drop down menu to specify that you want to 'Search adults with mandatory ongoing learning due for renewal'. You can then use the 'For module' drop down menu below to select the specific module you wish to search for. You will also be able to search by upcoming renewal date using the 'Due for renewal in the next X months' field.
- **Location** – Your role will affect which locations you can search.

You can enter as little or as much information as you wish, or have available. The more information you enter the more refined your search will be.

↓ Adult Training



Person Details

Member Number

Forename

Surname

Module Details

Update

For Module

Due for renewal in the next Months

Location

Country

Region

County

District

Group

My Learners Only

Clear Search

When you are ready, click the 'Search' button at the bottom right of the screen.

- The search results will then appear in the bottom half of the page in a table. Each member will have a check box next to their name and membership number at the left hand side of the page.

Select the check boxes of all members you want to update and click the 'Update training' button at the bottom left of the page.

COMPASS My Roles: District Training Administrator Welcome Back, George

My Scouting Events Training Messaging/Reports Awards My Profile

↓ Adult Training - (8 Matches Found)

Person Details

Member Number

Forename

Surname

Module Details

Update

For Module

Due for renewal in the next Months

Location

Country

Region

County

District

Group

My Learners Only

Clear Search

<input type="checkbox"/>	∇ No	∇ Name	∇ Role	∇ Location	Options
<input type="checkbox"/>	00955367	Mr George Heale	Section Leader	Scout 1 @ Compass Group	Update Training
<input type="checkbox"/>	00955389	Mrs Pamela Demo	District Explorer Scout Commissioner	District - Compass	Update Training
<input type="checkbox"/>	00955414	Mr Jackie Demo	Section Leader	Scout 1 @ Compass Group	Update Training
<input checked="" type="checkbox"/>	00955755	Mr Aidan Demo	Group Scout Leader	Compass Group	Update Training
<input checked="" type="checkbox"/>	00955765	Mr David Demo	Section Leader	Scout 2 @ Compass Group	Update Training
<input type="checkbox"/>	00955930	Mr Mike Demo	Section Leader	Scout 2 @ Compass Group	Update Training
<input type="checkbox"/>	00956005	Mr Ed Demo	Section Leader	Scout 2 @ Compass Group	Update Training
<input type="checkbox"/>	00956007	Miss Kirsty Demo	Section Leader	Scout 2 @ Compass Group	Update Training

Export Options Update Training

- A popup window will appear titled 'Select option – multiple members', with the number of members selected shown in brackets.

Under the 'Ongoing learning options' heading there are options to 'Add OGL hours' or 'Add mandatory OGL training'. (Details of how to add ongoing learning hours are provided in a separate guide.)

Select 'Add mandatory OGL training' using the 'Select' button to the right.

Select Option-Multiple Members (2)

Ongoing Learning Options

Add OGL Hours (2)

Add Mandatory OGL Training (2)

7 A popup window will appear titled 'Update multiple members', with the number of people you are updating shown in brackets next to it.

Fill in the required information, including:

- **Module** - Use the drop down menu labelled 'Module' to select the module to which the mandatory ongoing learning relates.
- **Date** - Enter the date on which the ongoing learning took place into the 'Training date' box. The date can be entered manually, or selected using the calendar icon to the right of the text box.
- **Renewal Date** - Completing the 'Training date' box will cause a date in the 'Renewal date' box to appear automatically, at the maximum of the recommended timeframe for renewal. If you want to change the renewal date you can do so by entering this manually into the 'Renewal date' box, or selecting the date using the calendar icon to the right of the text box.
- **Notes** - If there is any additional information you wish to add this can be entered into the 'Notes' box.

When you are ready, click the 'Next' button at the bottom right of the page.

Update Multiple Members (2)

Add Ongoing Learning Training

Module

Training Date

Renewal Date

Notes

Close Clear Next

8 The following window will display the names of all members whose records you are updating.

Each member will have a 'Remove' button at the right hand side of the window. Double check the list and if you want to remove any Member from the update list click on the 'Remove' button by their name.

When you are ready to save your updates, click on the 'Save' button at the bottom right of the window.

Update Multiple Members (2)

Members Being Updated

No	Name	Role
00955755	Aidan Demo	Group Scout Leader
00955765	David Demo	Section Leader

Previous Close Reset Save