



User guide: updating a module for multiple members

Roles: Training Managers, Training Administrators, Training Advisers (excluding validating the module).

Process overview: This process will allow users with the correct access rights to search for multiple members and update training modules for all those selected at the same time. It allows you to update modules that are part of an existing Personal Learning Plan (PLP) for a role the members hold. It also allows the user to assign a Training Adviser to the learner for the module being updated, although this is not mandatory to complete the process.

This process allows you to update the details of the learning or validation for a module, including:

- Whether it was agreed that the learning was required, and if so what learning has been completed and when.
- The agreed validation criteria and method for completion.
- The date of validation and who it was validated by.

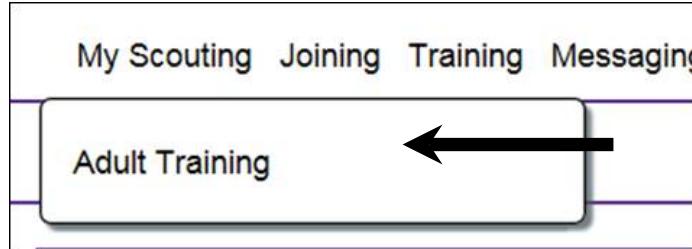
Please note: This process allows you to update multiple members' training records at the same time, making it easier to do tasks such as update the learning completed for all participants of the same course.

Process: updating a module for multiple members

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

The screenshot shows the 'My Scouting' homepage. At the top, there is a 'My Roles' dropdown set to 'District Training Administrator'. To the right, it says 'Welcome Back, George'. Below the header, there is a navigation bar with links: My Scouting, Events, Training, Messaging/Reports, Awards, and My Profile. A large black arrow points upwards from the bottom of the 'Training' link. Underneath the navigation bar, there is a section titled '↓ My Messages' with a search bar and a sort by dropdown. Below this, there are two sections: 'Show Messages For' and 'Filter Message Type', each with several checkboxes and their counts. The 'Filter Message Type' section includes categories like All Message Types, Alert, Administration, News, and Task.

- 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. Your role will affect in which locations you can search.

The screenshot shows the 'Adult Training' search page. At the top, there is a 'My Roles' dropdown set to 'District Training Administrator' and a 'Welcome Back, George' message. Below the header, there is a navigation bar with links: My Scouting, Events, Training, Messaging/Reports, Awards, and My Profile. Underneath the navigation bar, there is a section titled '↓ Adult Training' with a search bar and a sort by dropdown. The page is divided into two main sections: 'Person Details' and 'Location'. 'Person Details' includes fields for Member Number, Forename, Surname, Update, For Module, and Due for renewal in the next [1] Months. 'Location' includes dropdowns for Country (England), Region (Greater London), County (Gt. London North East), District (Chingford), Group, and My Learners Only. At the bottom, there are 'Clear' and 'Search' buttons, along with 'Export Options' and 'Update Training' links.

5 Complete the relevant search fields for your search.

Please Note: Using the 'Update' drop down menu, underneath the 'Module details' heading, will allow you to specify whether you want to search for learners with 'Learning required', 'Validation required' or 'Mandatory ongoing learning'. You can then use the 'For module' drop down menu below to select the specific module you wish to search for. If you selected 'Mandatory ongoing learning' in the 'Update' field, you will also be able to search by renewal date using the 'Due for renewal in the next X months' field.

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

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

6 The search results will then appear on 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.

If you want to select all members listed, click the check box at the top left of the table, next to the column headings.

My Roles: District Training Administrator

Welcome Back, George

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 England

Region Greater London

County GL London North East

District Chingford

Group Compass Group

My Learners Only

<input type="checkbox"/>	YNo	YName	YRole	YLocation	Options
<input type="checkbox"/>	00955367	Mr George Heale	Section Leader	Scout 1 @ Compass Group	<input type="button" value="Update Training"/>
<input type="checkbox"/>	00955389	Mrs Pamela Demo	District Explorer Scout Commissioner	District - Compass	<input type="button" value="Update Training"/>
<input type="checkbox"/>	00955414	Mr Jackie Demo	Section Leader	Scout 1 @ Compass Group	<input type="button" value="Update Training"/>
<input type="checkbox"/>	00955755	Mr Aidan Demo	Group Scout Leader	Compass Group	<input type="button" value="Update Training"/>
<input type="checkbox"/>	00955765	Mr David Demo	Section Leader	Scout 2 @ Compass Group	<input type="button" value="Update Training"/>
<input type="checkbox"/>	00955930	Mr Mike Demo	Section Leader	Scout 2 @ Compass Group	<input type="button" value="Update Training"/>
<input type="checkbox"/>	00956005	Mr Ed Demo	Section Leader	Scout 2 @ Compass Group	<input type="button" value="Update Training"/>
<input type="checkbox"/>	00956007	Miss Kirsty Demo	Section Leader	Scout 2 @ Compass Group	<input type="button" value="Update Training"/>

Please Note: If 'Learning required' was ticked when the module was added, the module must have an 'Actual completion' date entered before the module will be eligible for validation. If an 'Actual completion' date has not been entered, these modules will not appear in a search for 'Adults with validation required on training'.

- 7 Once you have selected the members whose records you want to update, click the 'Update training' button at the bottom left of the page.

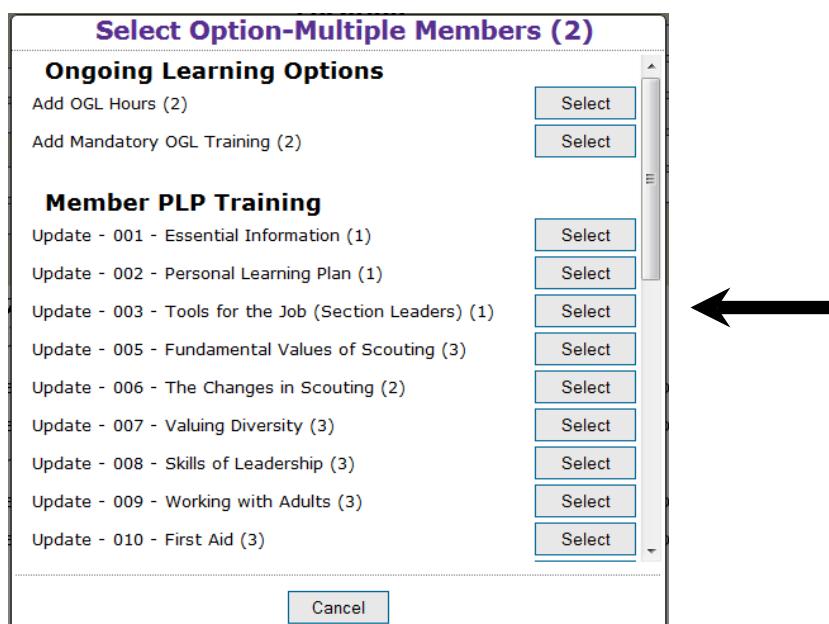
The screenshot shows the 'Adult Training - (8 Matches Found)' section of the Compass software. It includes fields for 'Person Details' (Member Number, Forename, Surname) and 'Module Details' (Update, For Module, Due for renewal in the next 1 Months). On the right, there's a 'Location' dropdown set to 'England'. Below this is a table listing 8 members with their names, roles, and locations. Each member row has a 'Select' checkbox and an 'Update Training' button. At the bottom left of the table area, there are 'Export Options' and 'Update Training' buttons. A large black arrow points to the 'Update Training' button.

- 8 A popup window will appear titled 'Select option – Multiple members', with the number of members selected shown in brackets. This window is split into two sections. The first section is titled 'Ongoing learning options'. (Guidance on how to update multiple members' ongoing learning is provided in a [separate user guide](#).)

The second section is titled 'Member PLP training'. This contains a list of all of modules within the members' PLP's that require either learning or validation (depending on the search criteria selected.)

Please note: If you searched for a specific module, only this module will appear under the 'Member PLP training' heading.

Each module will have a 'Select' button at the right hand side of the page. Click the 'Select' button for the module you want to update.



The number in brackets after each Module represents the number of times each module appears across all roles held by the members you have chosen.

- 9 A new popup window will appear titled 'Update multiple members'. This will allow you to update the module for all members selected. The first section is titled 'Update training, learning and validation'.

Use the drop down menu titled 'Learning method' to select the agreed learning method for the module. You can select more than one method if required.

Update Multiple Members (4)

Training Module - 005 : The Fundamentals of Scouting

Update Training, Learning and Validation

Learning Method

--- Select Learning Method ---

Validation Criteria

--- Select Validation Criteria ---

Validation Methods

- Demonstration
- Discussion With Your Training Advisor
- Other
- Product Of Work
- Project Work
- Video
- Witness Testimony
- Workbook/Worksheets

Actual Completion

• Required fields

Actual Completion

Next

- 10 Once you have selected the learning method(s), a new text box will appear under the 'Actual completion' heading. Enter the date the learning method(s) was/were completed. The date can be entered manually or selected using the calendar icon to the right of the text box.

Update Multiple Members (4)

Training Module - 005 : The Fundamentals of Scouting

Update Training, Learning and Validation

Learning Method

E-Learning

--- Select Learning Method ---

Validation Criteria

--- Select Validation Criteria ---

Validation Methods

- Demonstration
- Discussion With Your Training Advisor
- Other
- Product Of Work
- Project Work
- Video
- Witness Testimony

Actual Completion

• Required fields

Actual Completion

8/1

Remove

Next

- 11 The next section is validation, which will be located under the 'Validation criteria' heading. If there are any mandatory validation criteria for this module these will have automatically appeared.

You can then use the drop down box to select any additional validation criteria that have been agreed for this module.

Update Multiple Members (4)

Training Module - 005 : The Fundamentals of Scouting

Update Training, Learning and Validation • Required fields

Learning Method

E-Learning

--- Select Learning Method ---

Validation Criteria

--- Select Validation Criteria ---

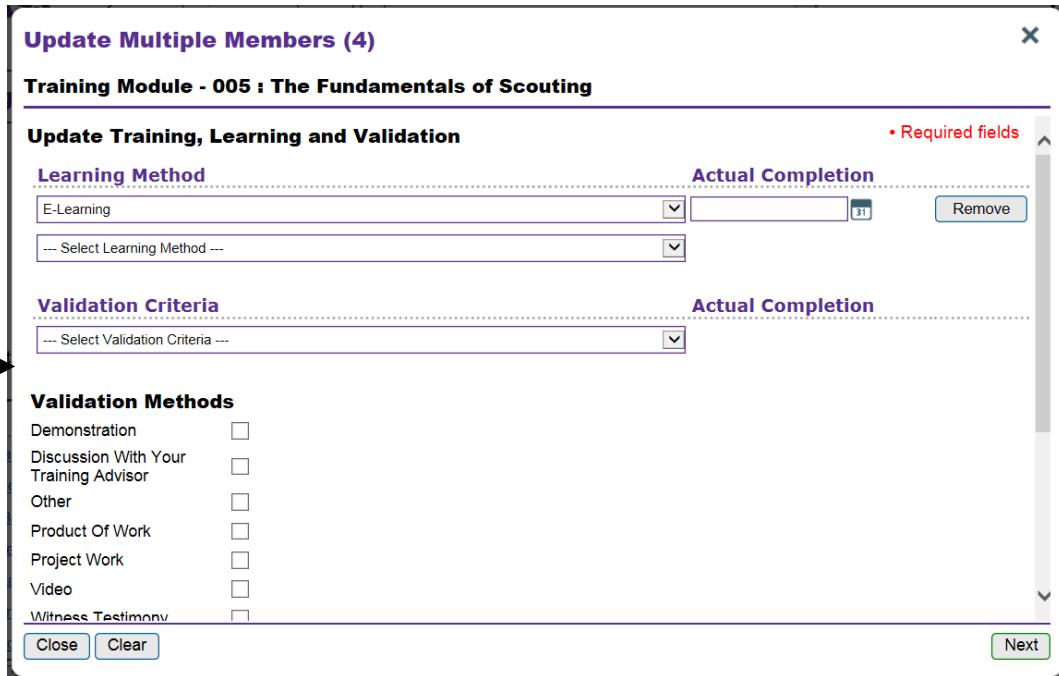
Actual Completion

Validation Methods

Demonstration
Discussion With Your Training Advisor
Other
Product Of Work
Project Work
Video
Witness Testimony

Actual Completion

Next



- 12 Once the agreed validation criteria have been selected a text box will appear under the 'Actual completion' heading. Enter the date the validation was completed, for each validation criterion. The date can be entered manually or selected using the calendar icon to right of the text box.

Update Multiple Members (4)

Training Module - 005 : The Fundamentals of Scouting

Update Training, Learning and Validation • Required fields

Learning Method

E-Learning

--- Select Learning Method ---

Validation Criteria

The Religious Policy

--- Select Validation Criteria ---

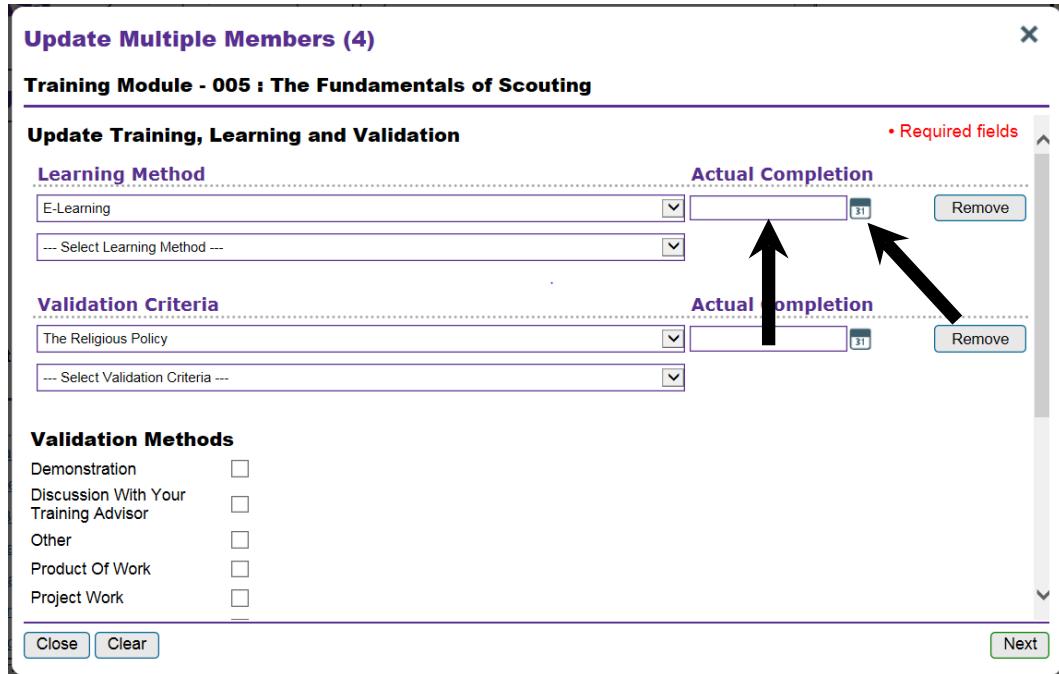
Actual Completion

Validation Methods

Demonstration
Discussion With Your Training Advisor
Other
Product Of Work
Project Work

Actual Completion

Next



- 13 Under the 'Validation methods' heading there will be a list of the different methods that can be used to validate the module. You may need to scroll the window down to see all of the methods.

Each validation method will have a corresponding check box. Use the check boxes to select the agreed

Update Multiple Members (4)

Training Module - 005 : The Fundamentals of Scouting

Validation Methods

Demonstration	<input type="checkbox"/>
Discussion With Your Training Advisor	<input type="checkbox"/>
Other	<input type="checkbox"/>
Product Of Work	<input type="checkbox"/>
Project Work	<input type="checkbox"/>
Video	<input type="checkbox"/>
Witness Testimony	<input type="checkbox"/>
Workbook/Worksheets	<input type="checkbox"/>
Written Material	<input type="checkbox"/>

Validation Completed

Validated By 

Validated On 

NOTE:
Validation Completed will not be set for training modules where learning is required, but no learning completion dates have been set.

Close **Clear** **Next**



validation methods. You will be able to select multiple methods.

- 14 If you are a Training Manager, or Training Administrator, you will then see the final section titled 'Validation completed'. If you do not wish to complete this section now, proceed straight to step 16. You will be able to update this information at a later date.

Please Note: This section will not appear for Training Advisers; they should proceed directly to step 16.

Update Multiple Members (4)

Training Module - 005 : The Fundamentals of Scouting

Validation Methods

Demonstration	<input type="checkbox"/>
Discussion With Your Training Advisor	<input type="checkbox"/>
Other	<input type="checkbox"/>
Product Of Work	<input type="checkbox"/>
Project Work	<input type="checkbox"/>
Video	<input type="checkbox"/>
Witness Testimony	<input type="checkbox"/>
Workbook/Worksheets	<input type="checkbox"/>
Written Material	<input type="checkbox"/>

Validation Completed

Validated By 

Validated On 

NOTE:
Validation Completed will not be set for training modules where learning is required, but no learning completion dates have been set.

Close **Clear** **Next**



15 The 'Validation completed' section has two fields to complete. You will only be able to complete these fields if all listed learning and validation methods have an actual completion date

- 'Validated by' - Enter the membership number of the member who validated the criteria into the 'Validated by' box or search for them by clicking on the magnifying glass next to the box.
- 'Validated on' - This will be automatically populated with the current date when you enter the validator's membership number. If you wish to amend this, please do so by using the calendar icon or manually entering the date.

Validation Completed

Validated By



Validated On



Please Note: This is only for Training Managers and Training Administrators. This section will not appear for Training Advisers.

16 When you have entered all of the relevant information and are ready to move on, click the 'Next' button at the bottom right hand corner.

Update Multiple Members (4)

Training Module - 005 : The Fundamentals of Scouting

Validation Methods

Demonstration	<input type="checkbox"/>
Discussion With Your Training Advisor	<input type="checkbox"/>
Other	<input type="checkbox"/>
Product Of Work	<input type="checkbox"/>
Project Work	<input type="checkbox"/>
Video	<input type="checkbox"/>
Witness Testimony	<input type="checkbox"/>
Workbook/Worksheets	<input type="checkbox"/>
Written Material	<input type="checkbox"/>

Validation Completed

Validated By

Validated On

NOTE:
Validation Completed will not be set for training modules where learning is required, but no learning completion dates have been set.

Close **Clear** **Next**

- 17 The following page will show the names of all members whose records you are updating and the roles the module will be updated for. Please note that if the same member requires the module updating for more than one role, they may appear multiple times in the list.

Each role will have a 'Remove' button at the right hand side of the page. Double check the list of members and if you want to remove a member's record from the update list, click the 'Remove' button by that role.

When you are ready to save the updates to the members' records, click the 'Save' button 'at' the bottom right of the page.

Update Multiple Members (4)

Fundamental Values of Scouting

Members Being Updated			
No	Name	Role	Location
00955755	Aidan Demo	Section Leader	Scout 2 @ Compass Group
00955755	Aidan Demo	Group Scout Leader	Compass Group
00955755	Aidan Demo	Group Scout Leader	Compass Group
00955765	David Demo	Section Leader	Scout 2 @ Compass Group

Previous Close Reset Save

The screenshot shows a modal dialog titled "Update Multiple Members (4)". Inside, there's a section for "Fundamental Values of Scouting". Below that is a table titled "Members Being Updated" with columns for No, Name, Role, and Location. The table contains four rows of data. To the right of each row is a "Remove" button. At the bottom of the dialog are buttons for "Previous", "Close", "Reset", and "Save". A large black arrow points from the bottom right towards the "Save" button.