

# Top Tips for Getting to Grips with Compass

## 1 Once you have access to Compass, make sure you've registered

If you registered when Compass was available locally before, or you're registered to use the reports system whilst Compass has been unavailable, then your login details will be the same as the ones you used for this.

If you're registering for the first time, it only takes a few minutes and all you need are a few details about yourself. You need to make sure that the details you're entering are the same as those recorded on Compass. If you're unsure or experience any difficulty, ask someone with access to your record to help you check them, for example your local line manager. [Find help with registration here.](#)

## 2 Help! I can't login

If you have already registered for Compass but have misplaced your username or password - don't panic! It's really easy to retrieve your username or reset your password, and it's something you can do yourself with a few personal details [Find help with how to reset your password or retrieve your username here.](#)

## 3 Update your personal details

If you've noticed that some of your personal details are wrong when registering or when you've logged in, eg if you've moved house or have changed your phone number or email address, then you can easily update these details yourself by logging into Compass and updating your record via your 'Personal Details' page. [Find help with how to update your personal details here.](#)

Some other details, including your name, gender, date of birth or title (Mr/Miss/Mrs etc.) are linked to your Disclosure or other security check and can only be changed centrally ([find more info here.](#)) If any of these fields are wrong, please contact your Appointments Secretary.

## 4 Familiarise yourself with the system

Please put aside 10 minutes to log in and have a look around the system, before you need to carry out a task. Familiarise yourself with what Compass looks like, what the different buttons do and where things are located, or you can watch the [Introduction to Compass video](#) which shows you around the site. Particularly focus on any tools that relate to your role, or questions you think others might ask you; try searching for someone to get used to the information that you need to enter and how the search results display. Help with the various processes is [available here.](#)

## 5 Know who can do what

The access you have to Compass is determined by the role(s) that you hold and where you sit in the hierarchy (e.g. Group, District or County level.) Knowing this, or where to find this information, will help you to understand what you are able to do and answer questions you may be asked by others. Details of the access different roles have can be [found here.](#)

## 6 Make sure you've selected the right role

One of the most common reasons that users can't complete an action or can't find someone that they expect to, is because they haven't selected their correct role from the 'My Roles' box at the top of the homepage. If you experience a problem or something doesn't work as expected make sure you double check this first, as well as looking at the [support materials online.](#) If you're still stuck, ask someone locally for support or contact the Scout Information Centre.

## 7 Youth Functionality

The focus of work over the last year has been on restoring the system to support adult records. Therefore, at the moment, Compass has adult data and functionality only. This means that you can carry out administration for adult members, such as adding new adults or administering roles, training and permits. The system does not include youth data or functionality at present, and the role of 'parent' has been removed from all adult records. The youth data has been removed and securely retained.

## 8 Use uservoice to report bugs

Compass is a new system and it's impossible to test for every eventuality, so it is normal that there will be small niggles and bugs that will crop up as it starts being used again. If you spot something which you think is wrong, please use the uservoice tool to let us know about by clicking on the red button with a question mark within Compass. The more information you can supply about what you were trying to do at the time the better; and adding a screenshot can be really helpful. **[Find help with how to report bugs here.](#)**

## 9 Data Protection – know the Policy

Compass was taken off line locally in January 2015, due to concerns about security vulnerabilities. Whilst Compass has been off line, work has been done to secure the system and extensively test to ensure that we are confident the system is secure and working effectively. You don't need to know The Scout Association's data protection policy by heart, but knowing where to find it is really useful and could save you a lot of searching or a phone call to HQ. **[Find more information on The Scout Association's data protection policy here.](#)**

## 10 Got a question or need some help?

There are lots of materials and people who can help you with questions about Compass.

Some of the key ones are:

- **[The Compass support site](#)**
- **[Userguides and quick start guides for processes in Compass](#)**
- **[FAQs for using Compass, as chances are that someone else may have asked it too](#)**
- **[Support videos for the most popular processes](#)**
- Other Members locally, such as your local line manager, Appointments Secretary, or the relevant member of your District or County/Area/Region (Scotland) team.
- **[The Scout Information Centre](#)**