



COMPASS
Helping you keep track of Scouting

User guide: adding a new role to an adult member

Roles: Appointment Secretaries, Administrators, Commissioners, Group Scout Leaders

Process overview: This process will allow users with the correct access rights to find adults who are already on the system and add an appropriate role to their record. The outcome of the process is that the user will be able to add roles to a Member's record or replace a current role on their record.

Process: adding a new role to an adult member

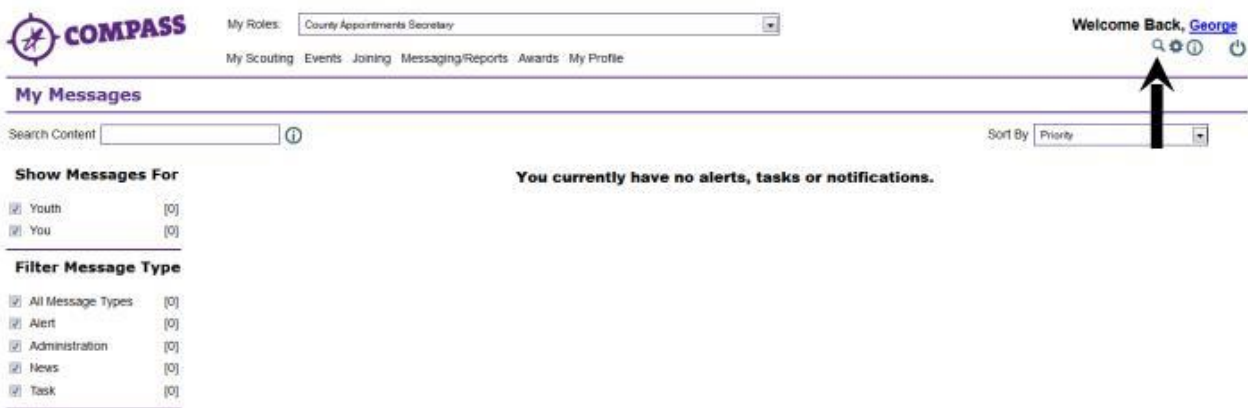
Ensure you have the correct role selected from the 'My Roles' selector at the top of the page. (This will be the role that gives you the appropriate access rights to complete this process.)

There are two methods you can use to search for the Member who you wish to add the new role to, Method 1 or Method 2. This guide will show both ways; please choose which method you wish to use.

If you cannot find the Member, it may be because they do not currently have any open roles, or are outside of your hierarchy; this means that they will not be visible to you on Compass. In these cases, you will need to follow the 'Add Adult Process' and should refer to the ['Adding an Adult Member' user guide](#).

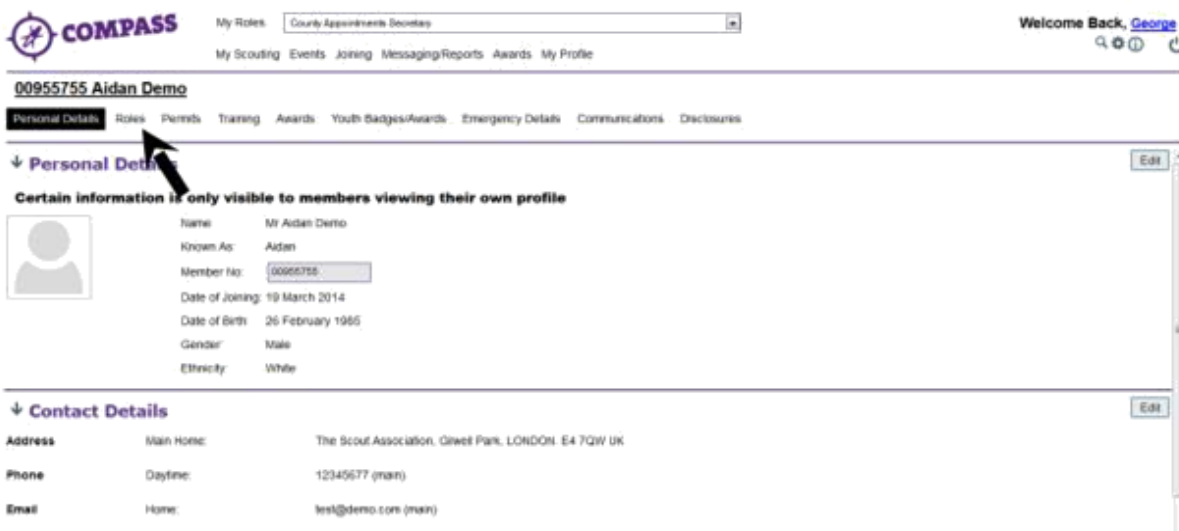
Part 1 - Method 1

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



Type the membership number of the Member whose role you are adding into the 'Go to Member' box, then click the magnifying glass icon next to the box. If you do not know the membership number, you can use the basic or advanced search options instead. Please see separate user guides for using the ['Basic Search'](#) or ['Advanced Search'](#).

- 2 You will then be taken to the Member's profile page. Under the membership number and name of the Member at the top left of the page will be a row of headings. Click the 'Roles' heading.



- You will then be taken to the 'Roles' page. There will be a list displayed containing the Member's current role(s), as shown below. At the bottom left of the page there will be a 'New Role' button. Click the 'New Role' button.

COMPASS My Roles: County Appointments Secretary Welcome Back, George

My Scouting: Events Joining Messaging/Reports Awards My Profile

00955755 Aidan Demo

Personal Details Roles Permits Training Awards Youth Badges/Awards Emergency Details Communications Disclosures

↓ Roles

Role	Class	Location	Start Date	End Date	Status	Options
Group Scout Leader (Primary)	Commissioner	Compass Group	19 March 2014		Provisional	Edit
Section Leader	Leader	Scout 2 @ Compass Group	19 March 2014		Provisional	Edit

New Role Membership Set Order / Preference

- A popup window will appear titled 'Assign New Member Role', with the Member's name and membership number underneath.

Assign New Member Role 00955414 Jackie Demo

New Role Details Member Role Details * Required fields

Approval Referees

Member Number: 00955414 Jackie Demo

Organisation: The Scout Association

Country: England

Region: Greater London

County: Gt. London North East

District: Chingford

Group: Compass Group

Group Section:

Replace Existing Role:

Role:

Role Variants: No Variant Types Available

Visible Role Title:

Start Date: [Calendar Icon]

End Date (This is a prior role): [Calendar Icon]

Close Clear Save Next

Proceed to 'Part 2'.

Part 1 - Method 2

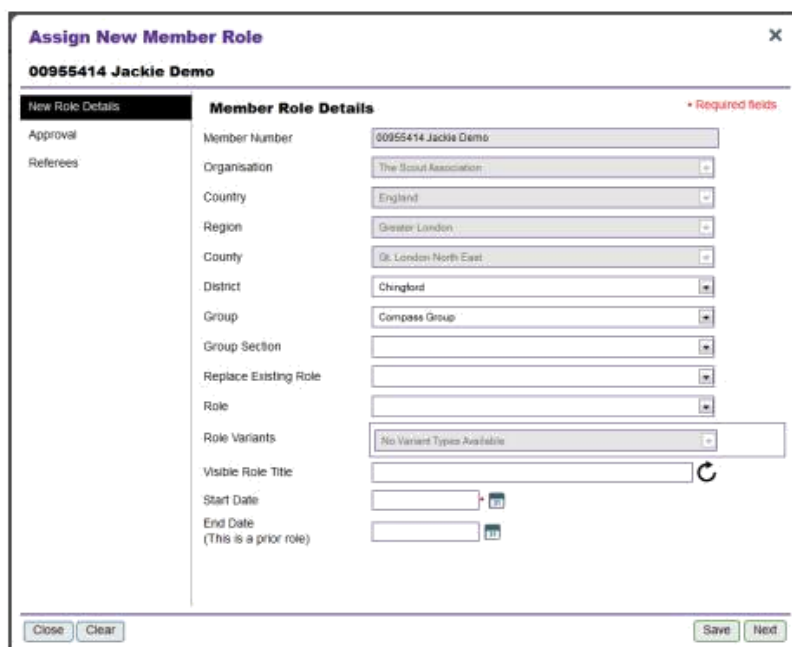
(Please go directly to Part 2 on the following page if you have used Method 1)

- 1 Hover over the 'Joining' heading towards the top of the homepage. A menu will appear underneath. Click 'Assign New Role'.



- 2 A pop up window will appear titled 'Assign New Member Role'. Using the box marked 'Member Number', type in the Member number of the Member whose role you are adding and then click the magnifying glass icon next to the box. If you do not know the Member's number, leave the box blank and click on the magnifying glass to search for the Member by name.

Once you have found the member, the screen should look like the screen shot below:

A screenshot of a web form titled 'Assign New Member Role'. The form is for a member named '00955414 Jackie Demo'. It has a sidebar on the left with 'New Role Details' and 'Referees' sections. The main area is 'Member Role Details' and contains several fields: 'Member Number' (text input with '00955414 Jackie Demo'), 'Organisation' (dropdown with 'The Scout Association'), 'Country' (dropdown with 'England'), 'Region' (dropdown with 'Greater London'), 'County' (dropdown with 'Gr. London North East'), 'District' (dropdown with 'Chingford'), 'Group' (dropdown with 'Compass Group'), 'Group Section' (dropdown), 'Replace Existing Role' (checkbox), 'Role' (dropdown), 'Role Variants' (dropdown with 'No Variant Types Available'), 'Visible Role Title' (text input with a refresh icon), 'Start Date' (calendar icon), and 'End Date (This is a prior role)' (calendar icon). At the bottom, there are 'Close', 'Clear', 'Save', and 'Next' buttons.

Proceed to 'Part 2'.

Part 2 - For Methods 1 and 2

- 1 Use the drop down menus available to choose the location and level at which the new role will take place. Depending on your role, this may already be partly or fully filled in. If adding a County or District role, the boxes for the levels below this do not need to be filled in and can be left as 'Select location'.

Please Note: When adding an Occasional Helper role, specify only a Group but not a Section as there is no Occasional Helper role option available when adding an adult to a Section.

The screenshot shows a web form titled "Assign New Member Role" for member "00955755 Aidan Demo". The form is divided into two main sections: "New Role Details" (left) and "Member Role Details" (right). A large black arrow points to the "Region" dropdown menu in the "Member Role Details" section. The "Member Role Details" section contains the following fields:

- Member Number: 00955755 Aidan Demo
- Organisation: The Scout Association
- Country: England
- Region: Greater London
- County: St. London North East
- District: [Empty]
- Group: No Items Available
- County Section: [Empty]
- Replace Existing Role: No Roles Available
- Role: [Empty]
- Role Variants: No Variant Types Available
- Visible Role Title: [Empty]
- Start Date: [Empty]
- End Date (This is a prior role): [Empty]

At the bottom of the form, there are buttons for "Close", "Clear", and "Save".

- 2 If the role you are adding is replacing an existing Full role you can use the 'Replace Existing Role' drop down menu to select the role that it is replacing. The old role will still appear as Open until the new role becomes Full.
- 3 Use the 'Role' drop down menu to choose the Member's new role. If the role has any variants, you can use the 'Role Variant' drop down menu to change it to a different variant. For example, the 'Section Leader' role's variant will include 'Beaver Leader' and 'Cub Leader'.
- 4 Once a role has been chosen, further options may become available within the left hand side menu depending on the role you hold. The new options are related to the Approval of the role being added.
- 5 Enter the role's start date into the 'Start Date' box. The 'End Date' box should only be used if you are adding a historical role.
- 6 Click the 'Save' button at the bottom right of the window to save the new role. This will open the Member's 'Roles' page and will show that the new role has been added at a Pre-Provisional level

OR

Click the 'Next' button to move on to the Approval process for the role. A separate userguide, called ['Editing and Approving a Pre-Provisional and Provisional Roles'](#) will walk you through the Approval process.