# An Introduction to Compass: Video Transcript

This video provides an introduction to Compass and the basic functions within it.

Open a web browser on your computer. Compass will work best in Google Chrome or Mozilla Firefox. You will get best results if you access it using a desktop or laptop, rather than a tablet or mobile.

Enter the web address [**https://compass.scouts.org.uk**](https://compass.scouts.org.uk) and press enter on a PC on your keyboard.

This will take you to the Compass login page.

Enter your username and password for Compass. Remember that both are case sensitive.

At this point your browser might ask if you want it to save your username and password. If you share your computer with others, or are using a public computer, we strongly advise you don’t do this.

If you don’t have a username or password for Compass yet, click on the link below the login boxes to [**register for Compass**](https://compass.scouts.org.uk/login/User/Register). The userguide [**‘How to register for Compass’**](http://compasssupport.scouts.org.uk/?guide=how-to-register-for-compass) will also help you to do this.

Click ‘Submit’.

You will be taken to the Compass homepage.

The homepage is where you will always be taken when you log in to Compass. From here you can get to all of the things you might need to do within the system.

We’re going to look briefly at the different buttons and functions, where they are and what they allow you to do.

This is the Compass button.

Clicking on this at any time will return you to the homepage, from wherever you are within Compass.

Do remember that if you do this in the middle of a process, your progress won’t be saved.

This is the ‘My Roles’ box.

If you have more than one role in Scouting this allows you to switch between them, by clicking the dropdown box and selecting the role you want. All the full roles you hold will then be displayed and you can select one by clicking on it.

The role that you select will alter what you are able to see and actions you’re able to do within Compass. For example if you are logged in as a Group Administrator you will be able to see all the Members within your Group. However, if you changed this to your Section Assistant role you would only be able to see Members within your Section. This is because the permissions are different for each role.

The role you have set as primary will always be the default selection. You can change your primary role by going to your profile page. Guidance on how to do this can be found on the Compass support site.

Before trying to do anything in Compass, it’s always a good idea to check that you’ve selected the right role for the task!

Within Compass, there are a number of alerts which are automatically sent to specific roles when a particular action is carried out within the system. For example, the relevant Training Manager will receive an alert when a Member has completed their Personal Learning Plan.

Messages can also be sent within Compass for certain purposes. For example, you can you search for a County Activity Assessor and contact them by sending them a message within Compass.

You can use the ‘My Messages’ search box at the top of the page to look for a particular message or alert. For example, you might search the name or Membership number of a specific Member to find anything relating to them.

You can also use the tick boxes on the left hand side to filter the type of message that you want to view.

Clicking on your name in the top right hand corner will take you to your profile page. Your profile page is essentially your record, and it’s where you can view all of the information recorded about your personal details, roles, training, etcetera on Compass.

You can also get to your profile page by clicking on ‘My Profile’. Along the menu at the top of the page.

These both take you to exactly the same place.

Clicking on the ‘settings’ button brings up the portal options. These allow you to change things like the size of the text, clear your cookie data (Compass’ memory of what you’ve been loading and clicking) or access information on browser compatibility.

Clicking on the information button will take you to the Compass support site, where you can find userguides, videos, FAQs and lots of other support to help you use Compass.

You can access this at any time, whatever page you are on in Compass. If your browser allows it, this site will load in a new page or tab so you can get help in the middle of completing a process.

Hovering over or clicking on the magnifying glass will cause the search dropdown box to appear.

From here you can search for a Member by entering their Membership number in the search box. This is the quickest way to find someone’s record, so having their Membership number is really handy.

If you don’t know someone’s Membership number, clicking on ‘Find Members’ will take you to a new screen where you can carry out a basic, advanced, permit holder or assessor search; entering as much or as little information as you have about the person you’re looking for.

Alternatively, you can click on ‘My Members’ which will show you the records of everyone available to you in your hierarchy. For example, if you’re a DC, all of the Members within your District.

Along the top of the page there are a number of headings.

Depending on your role, and the role you’ve selected from the ‘My Role’ box, you will be able to see some or all of these different headings and carry out different actions.

Again, these headings are always visible whatever page you are on in Compass.

Clicking on the My Scouting button will allow you to view your hierarchy, both the structure (Districts, Groups, Sections, etcetera) and the Members within these.

The level of your role will determine how much you can view. For example, if you have a Group role you won’t be able to change the Group, District or County that you can see. Whereas if you have a County/Area/region role you can view different Districts and Groups.

Clicking on the ‘Joining’ button gives you the options to add a new adult to Compass, or to assign a new role to an existing adult Member.

Clicking on the headings will take you to the relevant page.

Clicking on the Training button brings up the option of ‘Adult Training’. Clicking on this will take you to the training page where you can search for Member’s training records and update them; either for a single Member or more than one person at once.

The ‘Messaging/Reports’ heading has two options.

Clicking on ‘My Messages’ will take you to the messages on your home page. Clicking on ‘Reports’ will take you to a page where you can view and download the reports available to you within your role.

Clicking on the question mark in the red circle, the user voice button, will bring up the report an issue box.

From here you can report a bug or issue within Compass or you can share an idea you have about something that would make it better. See the video or user guide on Reporting a Bug or Issue with Compass for help with how to do this.

Finally, clicking on the power button in the top right hand corner will log you out of Compass. Always make sure that you log out properly, don’t just close your browser.

Clicking ‘Logout’ will sign you out and take you back to the [**Compass login page**](compass.scouts.org.uk) where we started. From here you can log back in, or access any of the Member’s Area resources.

Hopefully you are now familiar with the look and basic functions of Compass. It is a good idea to log in and explore [**Compass**](compass.scouts.org.uk) yourself before you have a task that needs to be done.

You’ll find lots more help and guidance on the [**Compass support site**](http://compasssupport.scouts.org.uk/?page_id=59542), where you can read other userguides and watch other video tutorials.