# How to add, edit or close a Group or Section: Video Transcript

We’re going to look at how to add, edit or close (in that order) a Section or a Scout Group.

We’ll look at how to do each of these for a Section, as the process is almost identical for both Section and Group. Where there are any differences when doing any of these processes for a Group instead, these will be highlighted.

Before you begin make sure you know the Section/Group name, date of registration, Type and capacity, as these fields are all mandatory.

For this example we’re going to focus on adding a Section within a Group, but it is the same at District and County level.

Make sure you’ve selected the right role for the task from the ‘My Role’ dropdown at the top of the page.

First, click on the ‘My Scouting’ tab.

Each heading (e.g. District or Group) will have its own menu that can be accessed by clicking the arrow next to it on the left hand side.

Navigate down to find the Group you want to add a Section to. To add a District Section or to add a Group, you would need to navigate to the relevant District.

(For more support with how to navigate the ‘My Scouting’ areas and view your hierarchy.

On the right hand side of the page under the ‘Options’ heading, there will be an ‘Add Section’ button. (This would be ‘Add Group, if adding a Group)

Click on ‘Add Section’ for the relevant Group.

A popup window will appear titled ‘New Group Section’, with the Group’s name underneath. The popup window is split into three tabs. These are Details, Contact Details and Meeting Schedule. They will be displayed in a menu on the left hand side

If you add a Group, it will be titled ‘New Group’ and the tabs you’ll see will be labelled Details, Contact Details and Minibus Permits.

Using the text boxes and dropdown menus fill in as much information as possible in the ‘Details’ section. Any field with a red dot next to is mandatory, and you’ll need this information to continue the set up.

When adding a Group, you will also need to select the ‘Group Type’, e.g. Land, Air or Sea. If you select Air or Sea another field will appear on the left hand side called ‘Recognised Status’. This refers to whether the Group is recognised by the RAF or Royal Navy. This field can only be edited by HQ, so just move on straight to Contact Details once you’ve completed the Details page.

Next, fill in the information required in the Addresses section.

If an address is already listed for the Group, when you add a Section this will automatically appear here. You can change this if you wish.

Clicking on the icon between the two address fields will transfer the Meeting Place Address over to the Correspondence Address. This will save you from typing it out twice if they are the same.

When you have entered all the relevant information, check it through and then click ‘Next’.

The ‘Contact Details’ page will appear.

The ‘Contact’ drop down menu can be ignored at this point as there will be no Members to choose from. Once the Section or Group has been populated with Members it can be set.

Enter a telephone number and email address for the contact in the boxes provided. These fields are mandatory.

This may need to be amended once the leadership of the Section or Group has been finalised.

You can also add a web address and social media details if you wish.

When you are have entered all the relevant information, check it carefully and then click ‘Next’ at the bottom right of the page.

The final page which will appear when adding a Section is the ‘Meeting Schedule’ page

Here you can add details of when the Section will meet e.g. what day(s) of the week and at what time.

These fields are not mandatory, so if you don’t know this information or it hasn’t been agreed yet, you can always add it at a later date.

Please note, the Meeting Schedule page won’t appear if you add a Group. Instead, the final page will be ‘Minibus Permits’ which would display any minibus permits held by the Group. You can’t edit this page, so just click ‘Save/Finish’. If you have minibus permits to add, please contact the Info Centre.

When you have entered all of the information and are ready to create the Section, click the ‘Save/Finish’ button.

You will be returned to your ‘My Scouting’ page.

The new Section you have just created will be listed underneath the Group, or underneath the District if you’ve added a District Section. You will now be able to assign Members roles within the Section.

If you have added a Group this will appear listed underneath the District. The registered Group number will be generated automatically, and can be viewed by clicking on ‘View’ next to the Group’s name.

If you have added a Group, you will need to add the required Sections using the process we just followed before you can add the Leadership Team.

Now we’re going to look at how to edit an existing Section. This can be used to edit details such as the meeting place or correspondence information. Editing a Group works in the same way.

Firstly, go to the My Scouting page.

Navigate down to find the location you want to edit.

On the right hand side of the page under the ‘Options’ heading, there will be an ‘Edit’ button.

Click on ‘Edit’ for the relevant Section.

A popup window will appear.

On the left hand side of the page will be the names of the different headings which make up the record. Clicking on the relevant heading will take you to that information.

The first page you will see allows you to update information such as the name or address of the Section.

Please note, if you want to change the name of a Group, this must be approved by the District Executive Committee and the relevant Commissioner first.

Once you have updated any details you wish on this page, click ‘Next’.

Alternatively, if you don’t want to edit any further information, you can click ‘Save’ which will return you to the ‘My Scouting’ page. You can do this at any stage. Clicking close at any point will return you to ‘My Scouting’ without saving any changes you have made.

You will now see the ‘Contact Details’ page. Here you can update the contact details saved for the Section, (or Group.)

You can also assign or change the ‘Contact’ using the Membership number ‘look up’ box.

To do this, type in the relevant Membership number and then press enter on your key board. Alternatively, if you click on the magnifying glass next to the box the ‘Find A Member’ popup box will appear where you can search for someone by name.

When you are happy with any amends you have made, click ‘Next’.

The final page you will see is the ‘Meeting Schedule’ page, where you can update the details of the day and time the Section meets.

When you have entered all of the details and are ready to save the changes you have made, click the ‘Save/Finish’ button.

You’ll be taken back to the ‘My Scouting’ page.

Now we are going to look at how to close a Section. We will look at how to close a Group separately, as this process differs slightly.

Closing a Section can be done by the same roles who can create a new Section.

Go to the My Scouting page and navigate down to find the Group and then Group Section which you want to close. To close a District Section you would need to navigate to the relevant District Section List.

At the right hand side of the page under the ‘Options’ heading, there will be a ‘Close Section’ button.

Click on this for the relevant Section.

A popup box will appear.

In the first tab, enter the date the Section closed by typing it directly or using the calendar selector.

Then enter the reason for the Section being closed into the text box below. E.g. merged with another Section.

The next section, ‘Section Members’, shows you the list of Members with active roles within the Section. If you are planning on ‘transferring’ the members of the section to another section within the same hierarchy; e.g. another Explorer Scout Unit or Network at District level, or from one section to another within the same Group, you will be able to do this.

Each member will have a drop down box under the Action headings on the right hand side of the window.

For each Member, choose from the options presented, to make sure there is no one left in the Section you are trying to close. You may need to check offline to be sure of individual’s intentions

When you have filled in the required information, check it carefully.

When you are ready, click the ‘Close Section’ button.

You will be asked to confirm your choice. Click ‘OK’ to continue closing the Section.

You will be returned to your ‘My Scouting’ page.

Finally we’re going to look at how to close a Group. This is very similar to closing a Section, although a slightly shorter process.

To close a Group you need to navigate to the relevant District.

On the right hand side of the page under the ‘Options’ heading, there will be a ‘Close Group’ button.

Click on this for the relevant Group.

A popup box will appear.

Please note, you won’t be able to close a Group until all of the Group roles and all of the Sections linked to the Group have been closed. If this is the case, you will see an error message.

Type in the date that the Group will close, or select date from the Calendar.

Check the information carefully, then click the ‘Close Group’ button.

You will be asked to confirm your choice.

Click ‘OK’ if you want to continue closing the Group.

You will be taken back to your ‘My Scouting’ page.

This process in Compass is now complete, but it’s really important make sure you communicate these changes locally.

This concludes this video. Further guidance can be found on the Compass Support site.