# How to update a Member’s training record: Video Transcript

We are going to look at how to update a Member’s training record.

Members with different roles will be able to complete different tasks relating to training. Details of which roles have access to do different tasks can be found on the Compass Support site.

We’re going to look first at an individual training record, and then how to update multiple records at once.

Make sure you have selected the correct role for the task you want to carry out from the ‘My Role’ dropdown menu at the top.

Start by searching for the Member whose record you want to update.

Search using their Membership number or, if you don’t know this, use the basic or advanced search options. More guidance on searching can be found on the Compass support site.

Once you’ve reached the Member’s record, click on the ‘Training’ tab.

The training page is split into several sections: ‘Personal Learning Plans’, ‘All PLP Training Modules’, ‘Mandatory Ongoing Learning’ and ‘Ongoing Learning Hours’. You may need to scroll down the page to view them all.

The first section, ‘Personal Learning Plans’, will show you all of the roles the Member holds for which there is a training requirement. To view the PLP for a specific role, you need to click on ‘Show PLP’.

The PLP requirements will appear listed beneath the role. When a new role is assigned to a Member a PLP is automatically generated, with the modules required for that role. Further modules can then be added depending on the learner’s requirements as agreed with their Training Adviser.

To add a module to the PLP click ‘Add Module’.

A popup box will appear. You can add details, such as the module name, planned completion date for learning or the validation criteria agreed and when they were completed. Only the module name is required.

When you have added any details you want to, click ‘Save’.

From the main training page you can then assign a Training Adviser for the role and record the date on which the PLP was agreed.

You can also update the details for each module within a PLP.

There are two ways to do this. One option is to do this directly into the PLP, using the drop down boxes to select the relevant details or entering the TA’s details to validate the module.

However, this only enables you to update some details. You can carry out more detailed updates by going into a specific module.

To do this, click on ‘update’, to the right of title of the module you want to update.

In this box you can update further details, such as planned completion date for learning or the validation criteria agreed and when they were completed.

It is important to note that if ‘Learning Required’ has been ticked you will not be able to validate the module unless an ‘Actual Completion’ date for the learning has been entered.

If you have the relevant access, you can also use the fields at the bottom of the box to validate the module.

When you have made any updates you want to, click ‘Save’.

Once all the required training modules have been validated those with the relevant access will be able to recommend a Wood Badge.

To do this, click on ‘Recommend Wood Badge’. If modules have only just been validated then you may have to refresh the page before the button will appear.

A popup box will appear titled ‘System Confirmation’. Click ‘OK’ to confirm and a Wood Badge will be issued.

The Wood Badge will now show as completed on the PLP with the date of completion. The actual certificate, and wood beads if appropriate, will be sent out from HQ.

To hide the PLP again when you’ve finished, click ‘Hide PLP’.

The second section, ‘All PLP Training Modules’, shows you all of the training modules which the Member has on their record for all of the roles they hold. This includes both open and closed roles.

Some modules may appear more than once because they appear on PLPs for more than one role.

You can also update Modules using the ‘update’ button to the right of the Module title.

The third section shows you details of the Member’s mandatory ongoing learning if it is required for their role(s).

The names of the ongoing learning modules will be listed, along with details of when they last completed it and when it is due for renewal.

Clicking on the names of the different categories will show further details.

Please note that if a Member completes an adult training scheme module which also counts as one of their mandatory ongoing learning requirements. This will be recognised automatically by Compass and recorded here.

If you want to add mandatory ongoing learning to a Member’s record, click on ‘Add OGL Training’

A popup box will appear.

Use the drop down and text boxes to fill in the details of the module, training date, renewal date and any notes that you want to add.

Please note, when you add a training date the renewal date will automatically be populated with the maximum length of time. Make sure you check what is entered here carefully and make any amends you wish to before saving.

Once you are happy with the entry, click ‘Save’.

The fourth and final section, ‘Ongoing Learning Hours’, shows a record of the ongoing learning hours which the Member has completed. These are grouped by year, and the figure shows you the total completed in that year.

To view the details on ongoing learning hours completed in a certain year, click on the year.

If you want to add a new entry, click on ‘Add OGL Hours’.

A popup box will appear.

Use the drop down and text boxes to fill in the details of the number of hours, the date it was completed and a description of what the training was.

When you are happy click ‘Save’.

We will now look at how to search for multiple records to update at the same time.

To do this, click on the ‘Training’ tab at the top of the homepage, then click on ‘Adult Training’.

This will cause the training page to appear.

From here you can search for multiple learners at once based on different criteria – and then either export the results or update multiple training records.

In the ‘Module Details’ section, you can select criteria which relate to learning needs. For example, whether they need to complete learning for a particular module.

In the ‘Location’ section, you can select criteria which relate to the location of Members.

The options you can chose may be restricted by your role.

When you have selected the criteria you want, click ‘Search’

The results will appear in the bottom half of the page.

If you wish, you can export these search results by selecting the Member records you want to update using the tick boxes on the left hand side. Then click ‘Export’.

A popup box will appear giving you options as to how you want to export them. Clicking on ‘Export to CSV’ will export them as a spreadsheet.

Alternatively you can update the training record for one or more Members.

Select the Member records you want to update using the tick boxes. Then click ‘Update Training’.

A popup box will appear where you can choose what you want to update. Options may include ongoing learning or different modules within the adult training scheme (depending on the search criteria and records you selected.)

Click ‘select’ next to what you want to update.

When you have entered the relevant information click ‘Next’.

You can then check that you are updating the right members’ records. Click ‘Remove’ next to a member’s record if you decide that you do not wish to update the member’s training.

When you have finished click ‘Save’.

For further help and support with training and other tasks please visit the Compass Support site.