

# Updating Compass Guidance

To ensure that all key elements of Compass data can be migrated to the new digital systems, it is important that Compass is fully updated prior to the Compass freeze.

This document provides the necessary information to ensure that Compass data is fully readied for the migration. An earlier version of this document (prepared in March 2023 and updated in June 2023) provided more background information, including the reasons why each change is needed. This version of the document is simplified in comparison – it provides only the action points about the actual changes that require to be made.

The changes are organised into three sections:

- What each volunteer needs to do
- What Groups need to do
- What Counties/Districts need to do

## 1. What each volunteer needs to do

### 1.1. Update the PERSONAL DETAILS section of your Compass record

- Ensure that addresses/post codes, email addresses and phone numbers are accurate on your Compass record.
- Note that there are two Compass fields that are mandatory - Ethnicity and Faith/Religion. Compass won't save updates to the PERSONAL DETAILS section unless these fields are completed.

### 1.2. Set up email addresses in preparation for the migration of your Compass record to the new system

- There are two uses for email addresses on the new system:
  1. The **username** for login to the digital system. The login email address for each volunteer must be personal to you, be unique, and working.
  2. The address to which **communications** will be sent.
- Case 1: you have just **one** email address listed on Compass.  
In this case that single email address will be used as **username** for the new system AND as your **communications** address.
- Case 2: you have more than one email address listed on Compass  
In this case the email address to be used as **username** for the new system should be marked as the '**volunteering**' email address on your Compass record, and the email address to be used for **communications** should be marked '**scouting enquiries**'.

If you have zero, or more than one, email address marked as 'volunteering' then the email address marked as **Primary** on Compass will be used as your **username** for the new system.

If you have zero, or more than one, email address marked as 'scouting enquiries' then the email address marked as **Primary** on Compass will be used as the **communications** email address for the new system.

### 1.3. Rationalise your telephone numbers in preparation for the migration

- The new system can record two telephone numbers for each volunteer, a **Preferred** number and an **Alternate** number.
- Case 1: you have **no** phone numbers listed on Compass  
In this case both your **Preferred** number and your **Alternate** number will be 'empty' on the new membership system.

In this case it would be very helpful to add at least one phone number to your Compass PERSONAL DETAILS.

- Case 2: you have only **one** phone number showing on Compass  
In this case that number will be used as your **Preferred** number on the new membership system, and your **Alternate** number will be 'empty'.
- Case 3: you have **more than one** phone number showing on Compass  
In this case, your chosen **preferred** phone number should be marked as the '**scouting enquiries**' phone number and your chosen **alternate** number marked as '**volunteering**' on Compass, ready for transition to the new membership system.

If you have zero phone numbers marked as 'scouting enquiries' on Compass, then your phone number marked as **Primary** will be used as **Preferred** for the new membership system, and your **Alternate** number will be the most recently updated number of the others available.

If you have more than one phone number marked as 'scouting enquiries' on Compass, then the phone number marked as **Primary** (whether or not it is marked as 'scouting enquiries') will be used as your **Preferred** for the new membership system, and your **Alternate** number will be the most recently updated number of the others available.

### 1.4. Record data from your Compass record that will NOT be migrated

- While most data from your Compass record will be migrated, some will not. This particularly applies to any information that you have recorded in Ongoing Learning on your TRAINING record.
- Any records you wish to keep from your Ongoing Learning please take note of and you can then add these back on in the new system E.G. NSRA YPS Tutor Course

## 2. What Groups need to do:

### 2.1. Support each volunteer to make the updates listed in section 1 above

### 2.2. Update each volunteer's recorded roles

- Line managers should make sure that each volunteer's current roles are accurately recorded on Compass.
- Please close roles which are no longer active, including inactive Active Support Unit members.
- Please also add roles that are not recorded (e.g. if a member is working with both Beavers and Cubs, then they should have a role with each section).

This also applies to leaders with multiple variants on a role. For example, if a leader has one Section Assistant role showing as Section Assistant – Beavers, Cubs, then please ensure that the leader has two Section Assistant roles (one in Beavers and one in Cubs).

- As part of this task, please make sure that every appointed or co-opted member of every Trustee Board (Group, District and County) is recorded on Compass.

But ex officio Trustee roles (Group, District and County Lead Volunteers, and District and County Youth Leads) should **not** be recorded as Trustees.

### 2.3. Close Group Occasional Helper (OH)/PVG-only "roles" that are no longer required

- Although not a vital task prior to migration, it will be helpful for each Group to close OH/PVG-only roles that are no longer active
- This is particularly important where the OH is a duplicate for a volunteer who currently has a role that requires a criminal records check.

### 2.4. Updating Section organisation records

- GSLs can update **section** organisation records on Compass for Squirrels, Beavers, Cubs, Scouts.
- All fields in the Compass **section** organisation record can be updated, but GSLs are particularly asked to complete (or update) these fields:
  - Section name & type
  - Meeting place and correspondence addresses
  - Primary contact phone number
  - Volunteer email address to drive the group finder system
  - Scouting enquiries email address to drive the group finder system

### 3. What Districts/Counties need to do

**3.1. Support each volunteer in the District/Group team to make the updates listed in section 1 and 2 above**

**3.2. Update each volunteer's recorded training**

- Make sure that all validated training modules (including mandatory on-going training) for each volunteer is recorded and up to date on Compass before the Compass freeze prior to migration.
- It is important to note that only VALIDATED training will be migrated – modules showing only 'learning completed' will NOT be migrated. Also note that the text fields in 'Ongoing Learning' will not be migrated.

**3.3. Close District/County Occasional Helper (OH)/PVG-only "roles" that are no longer required**

- Although not a vital task prior to migration, it will be helpful for each District and County to close OH/PVG-only roles that are no longer active.
- This is particularly important where the OH is a duplicate for a volunteer who currently has a role that requires a criminal records check.

**3.4. Update Explorer and Network section organisation records**

- DESCs can update **Explorer** and **Network section** organisation records on Compass.
- All fields in the Compass **section** organisation record can be updated, but DESCs are particularly asked to complete (or update) these fields:
  - Section name & type
  - Meeting place and correspondence addresses
  - Primary contact phone number
  - Volunteer email address to drive the group finder system
  - Scouting enquiries email address to drive the group finder system.
- Compass organisation records for Groups, Districts and Counties can only be updated by the Support Centre. You are asked to await the migration to the new system and update those organisation records locally **after** migration.