

POINTING THE WAY - Issue 3 (22/12/14)

NE REGION Compass UPDATE



Newsletter Purpose

The purpose of this Newsletter is to direct you towards the things you should be doing as a Leader and most importantly remove some of the pain in learning a new IT system. Some items will be similar to the last but new updates shown in **Red**.

System Status

The system has been up and running since September. The last major problems experienced by Users were when the invite went out to all remaining Leaders to register (27/11/14). The system is functioning and:

- All leaders can and should now register
- The data on adult volunteer records has been fixed as much as possible with the focus on fixing the locations of where a member carries out their Scouting.
- TSA are still working on some training data migration fixes. Do not edit training or award records if they look incorrect.
- If training records for a Leader are correct, it is fine for members with a training role (e.g. Training Advisors, Administrators and Training Managers) to make updates and edit records.
- Leaders need to check their Roles and Locations, along with the Roles and Location(s) of their team. Any issues need to be flagged to the District Appointment Secretary for correction / amendment.
- **District commissioners have been given access to Youth Data**
- **Award fixes are ongoing**
- **Compass now has the ability to move people to the correct location without effecting their associated role data.**
- Do not 'play' with the system performing tasks which are not 'genuine' or load test data. This cannot be easily removed.
- **The Infocentre will be closed from 24th December to 5th January.**
- **The award of Wood Badges is on hold until 1st February 2015 to allow space for whilst**

2015 Census Status

The closing data for the 2015 census remains 31st January 2015. The NE Scotland status is:

- **Groups: 2 of 73 complete (vs 2014 data)**

- **Group Section: 9 complete (vs 2014 data)**
- **District Explorers: 1 of 8 complete (vs 2014 data)**
- **Region Progress: 8.55% with 419 records (compared to 4901 in 2014)**

GSLs and Commissioners will get an opportunity to see the draft 2015 Census report and correct **error in Compass** before it is finalised by TSA. The census data is an electronic extract from Compass and there is **NO** manual 'correction'.

What is Compass

Compass is the new membership system for The Scout Association (TSA). It was developed through consultation with member. Use of the system is **NOT** optional, it is **MANDATORY** and comes in to effect on 1st January 2015 in line with the January 2014 edition of POR rule 14.11 and 14.12.

Current Local Rules

- 1) All new appointments to still be routed through the Appointment Secretaries using the new Adult Information Form along with the completed Disclosure Form (please keep together).
- ~~2) Locations should not be updated.~~
- 3) Training records should not be updated if they look incorrect.

What should Appointment Secretaries be doing in Compass?

- Joining: Adding New Adults
- Requesting References
- Updating appointment progress for new members
- **Changing locations using the new compass function where not correct for existing members**
- **Adding new roles relating to new appointments**

What should Training Advisors be doing in Compass?

- **Updating training records (for those people with profiles which look correct)**

What should Leaders be doing in Compass?

- Check your 'My Profile'
 - Contact details
 - Location
 - Roles
 - Permits
 - Training
 - Awards
 - Emergency Details
 - Communications
 - Disclosures
- **Ensure your Primary Role is correct and matches where you would like to be recorded in the 2015 Census,**
- **Checking the details of their management team**

- **Removing 'non-active leaders'** or changing role to PVG only if this is more appropriate (this will impact 2015 Census numbers and associated costs as there is no manual 'correction').
- Checking the details of the Section you manage. If it is not in Compass create using the appropriate User Guide. Contact Gilwell to make sure Section is added to the Youth Data Upload Site.
- ~~Start preparing to gather all your youth data for loading into Compass, load template can be found at <http://scouts-news.org.uk/L4Y-2ZI72-B98IF9-1GYCL1-1/e.aspx>~~
- Load your Youth Data in to Compass, remembering this can only be done once per Section.
- Remove youths who have left the movement and currently shown as 'active' on the membership database (this will impact 2015 Census numbers and associated costs as there is no manual 'correction').

If you see any problems with Roles, Locations and Disclosures contact your Appointment Secretary. For any other issues your District Commissioner. Only after Roles and Locations have been corrected will the Region start to correct / update the remaining training record issues.

What should Appointment Secretaries and other Leaders NOT do in Compass at present?

You cannot perform the following functions:

- Use the system for training purposes
- ~~Add / Update Groups / Sections~~
- Updating appointments to existing members if they look incorrect (contact Gilwell)
- Update training records to existing members if they look incorrect (Contact Gilwell)
- ~~Add / update Youth Data~~
- Add / update Badge details

Collating Data

There are a number of fields on a Youth Record within Compass which are mandatory and must be completed before the record can be saved to the system. This will create considerable frustration if not planned. There is a high likelihood that some of the information is not available from current records (paper, spreadsheets or OSM). It is **strongly recommended** that someone from your Section / Group is nominated as a Compass Data Champion to review the Youth Data Template the Compass data requirements and compare to the Section records.

POR 14.12 f) States "All membership data should be checked as regularly as possible to ensure it is correct / factually accurate and must, in any event, be checked on an annual basis". As part of the youth data load it is **strongly recommended** that the Sections get parents to complete a new YPIF. This will both help as a check

of the data currently collected, but also fill in any gaps in data required by Compass.

OSM

Go to settings (the cog), Personal Details Fields and use the drop-downs to tell the system which OSM field is which Compass field. If you leave out gender, ethnicity & disabilities then if you have used our census aggregator, that info will automatically be pulled in.

You'll then get a "Compass" entry in the menu on the left where you can download the CSV. Copy & paste it into the normal spreadsheet as per the userguide.

That "Compass" page will then tell you what changes you've made in OSM that you should update in Compass - it is in effect your "Compass updates to-do list" - so whenever you change something in OSM (Personal Details/census/adding/remove members etc), it'll tell you what you should do in Compass. Once you have downloaded data from OSM, the system will keep track of changes so you can keep Compass and OSM manually synchronised.

Youth Data Upload

There are three steps to uploading youth data:

1. Complete the [Youth Data Template](#)
2. [Register with Compass](#)
3. [Upload the data](#)

Detailed instructions on the process and any other aspect of using Compass can be found in the [Compass user guide](#). After reading the guide, if you have any questions on how to proceed, please contact Andy Till at: andy@the-tills.com.

Youth Data should be uploaded using the templates provided and only requires 10 key items of mandatory information, which are title; forename; surname; role; date of birth; first line of address; town; postcode; start date; and country. **However, Nationality, Ethnicity and Faith / Religion are requiring before the data upload meets the 2015 Census minimum data requirements. It is strongly recommended that this information is included in the upload spreadsheet to save time.**

Future Compass Updates

In the New Year there will be an invite by TSA to get involved in shaping the future requirements in Compass. If you are keen to get your comments in now, use the User Forum.

Helpful Information

The Youth Data Template (YDT) can be found at:
<http://compassuserguide.scouts.org.uk/wp-content/uploads/2014/08/Compass-Youth-Data-Import-Template-Office-97-2003-version-12-Sept-2014.xls>

Detailed guidance of how to use the system can be found at: <http://compassuserguide.scouts.org.uk/>

Towards the bottom of the Compass User Guide page you will find the new Young Person Information Form (YPIF).

Most questions and issues have already been logged and responded to. For detailed information check the current Frequently Asked Questions News at:
<http://compassuserguide.scouts.org.uk/faq/index.php>

Alternatively you can contact the Scout Information Centre on [0845-3001818](tel:0845-3001818) / [020-8433-7100](tel:020-8433-7100) or info.centre@scouts.org.uk who are incredibly helpful.

Region Contacts

Compass Champion: Alistair Moore
Region Trainer: Andy Till

Both can be contacted at: compass@scouts-northeastscotland.org.uk

Date(s) For Your Diary

08/01/15 - Peterhead @ 7:30pm Contact: Isobel Stewart (isobel.stewart@talk21.com)

Receiving this Newsletter Directly

If you would like to receive Newsletter Updates directly please send an email to compass@scouts-northeastscotland.org.uk

As the deployment and use of Compass changes we will update 'Pointing the Way'. Look for the latest issue on your Region Web site scouts-northeastscotland.org.uk