



# COMPASS Corporate User Guide

The Competence Management System  
for Project Professionals.

Version 2.22

transforming performance  
through learning

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#### CONTACT

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## 1.1 Introduction

COMPASS is the industry-leading online assessment tool from QA. With a simple user interface and automatically generated PDF reports, it is being adopted by many organisations as a benchmarking tool for their project management communities.

COMPASS is part of the QA Living Learning Framework which provides organisations with a structured programme for developing competent project professionals through progressive and immersive learning.

It is a cloud-based solution which is hosted and managed by QA on a secure and encrypted server. It requires no downloads or installed software, and is accessible through any web-browser.

The following workflow diagram shows the end to end process at high level with reference to the relevant sections in this user guide. Use this for a basic process overview and graphical index.

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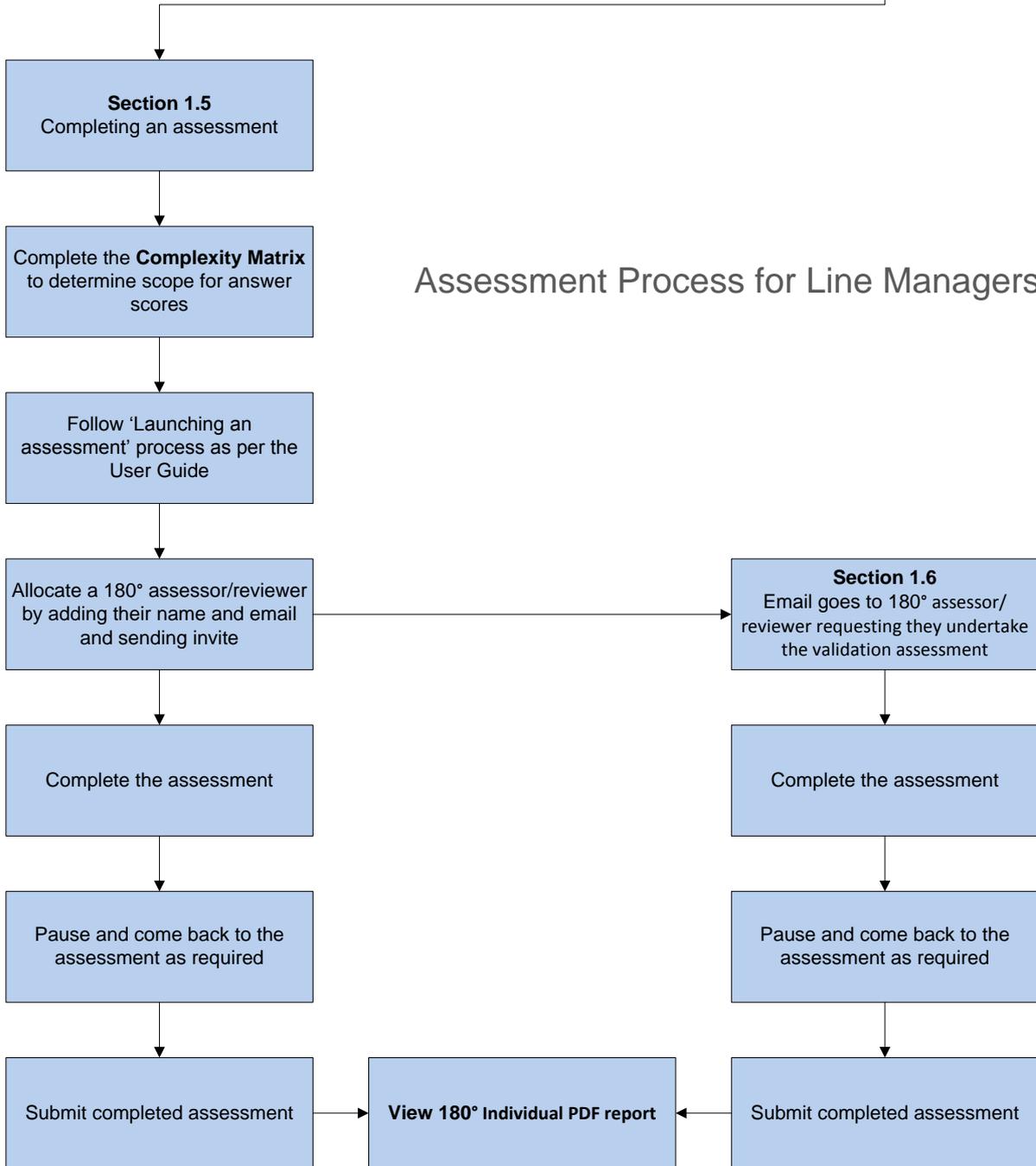
**NOTE: This comprehensive USER guide shows screenshots from a standard COMPASS implementation. If your organisation has tailored COMPASS then the screens may be slightly different to those shown, but the process and the functionality will still be the same.**

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## Registration Process



## Assessment Process

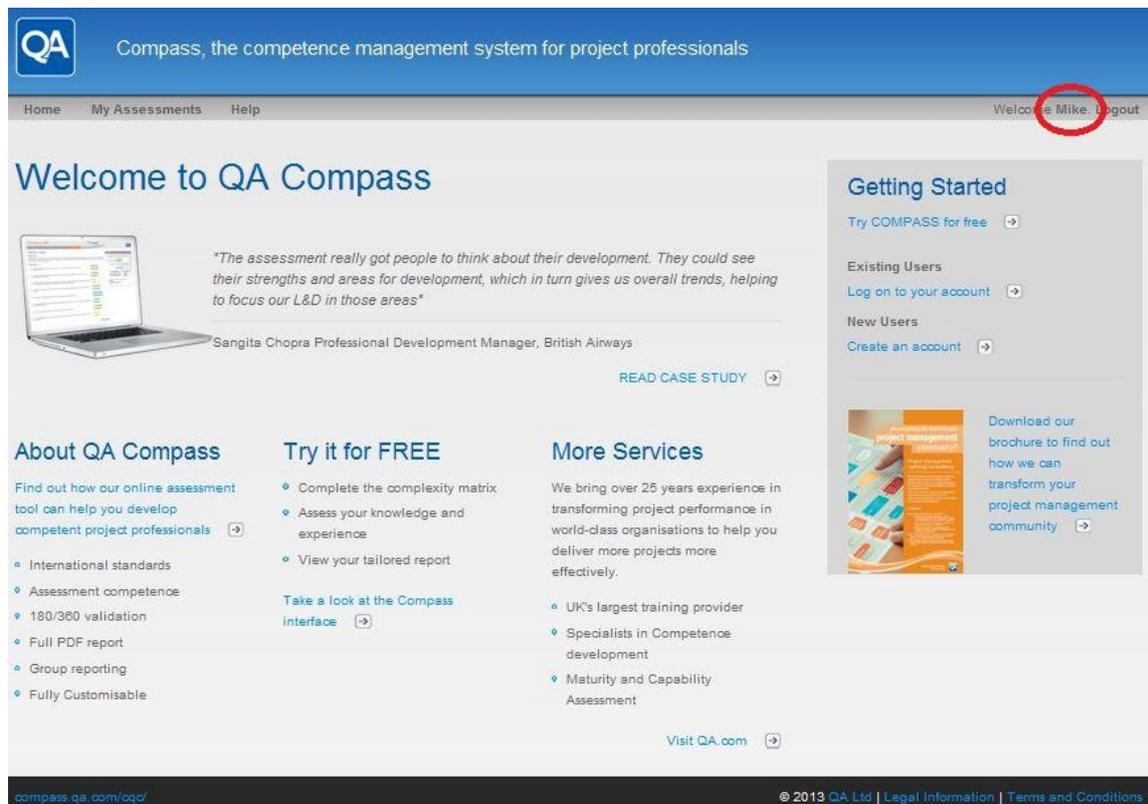


## Assessment Process for Line Managers

## 1.2 How to access COMPASS

To access COMPASS, open your web browser and type: [compass.qa.com](http://compass.qa.com) into the address bar and click **RETURN**. If you have your own corporate instance please enter your specific URL.

The following page will be displayed.



### New Users

If you are a new user then you will be able to register for a free account by clicking on the **Create an account** link in the **Getting Started** panel on the right hand side of the screen or by clicking the **Register** link in the **navigation bar**.

### Existing users

If you are an existing user then you will be able to log into your account by clicking on the **Log in to your account** link in the **Getting Started** panel on the right hand side of the screen or by clicking the **Login** link in the **navigation bar**.

### Changing your Password

You can change your password at any time by clicking on your name as shown at the top right of the Home screen (highlighted above). You can also change your personal detail in the same area.

## 1.3 Registering for a new account

From the home page, click on the **Create an account** link in the **Getting Started** panel on the right hand side of the screen or by clicking the **Register** link in the **navigation bar**.

The following screen will be displayed:

The screenshot shows the 'Member Registration' page. At the top is a blue header with the QA logo and the text 'Compass, the competence management system for project professionals'. Below the header is a navigation bar with links for 'Home', 'My Assessments', and 'Help', and a user status 'Welcome Guest. Login Register'. The main content area has a title 'Member Registration' and a 'Submit' button. Underneath, it says 'New Corporate member' and provides instructions: 'To register for an account you need to know your company password for Compass. This is only required once, and will give you access to the registration form.' It also notes that the password is case sensitive. A section titled 'Corporate Registration Security Check' contains two input fields: 'Password:' and 'Email address:'.

Enter your email address and your company corporate password.

You will then see the following page:

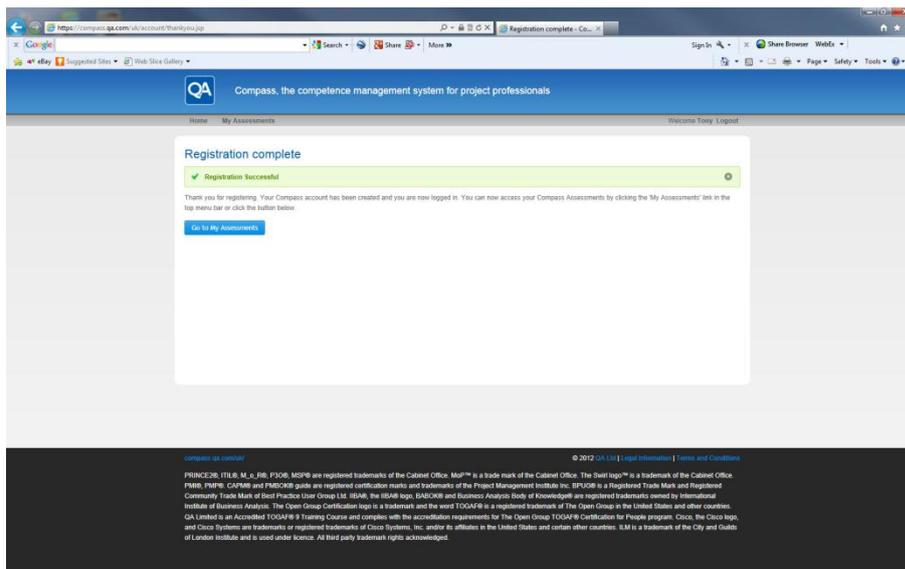
The screenshot shows the 'Corporate Registration' page. It features the same header and navigation bar as the previous page. The main content area has a title 'Corporate Registration' and a 'Submit' button. The instructions state: 'To register for Compass simply complete the following details.' A note indicates that fields with an asterisk are required. The form is divided into two sections: 'Contact information' and 'Login information'. The 'Contact information' section includes fields for 'First Name:', 'Last Name:', 'Company:' (with 'CQC' entered), 'Email address:' (with 'mike.kibblewhite@qa.com' entered), 'Industry:' (a dropdown menu with 'medical/health services' selected), 'Phone:', 'Mobile Phone:', and 'Country:' (a dropdown menu with 'UNITED KINGDOM' selected). The 'Login information' section includes fields for 'Desired Username:', 'Password:', and 'Re-type Password:'.

As a new user, you are required to complete some basic details for your COMPASS profile, so enter your details as required. For the username you should use your own personal email address since this is unique.

**NOTE: If your organisation has required additional information such as Payroll number or Location, then these additional fields will also be displayed and are compulsory.**

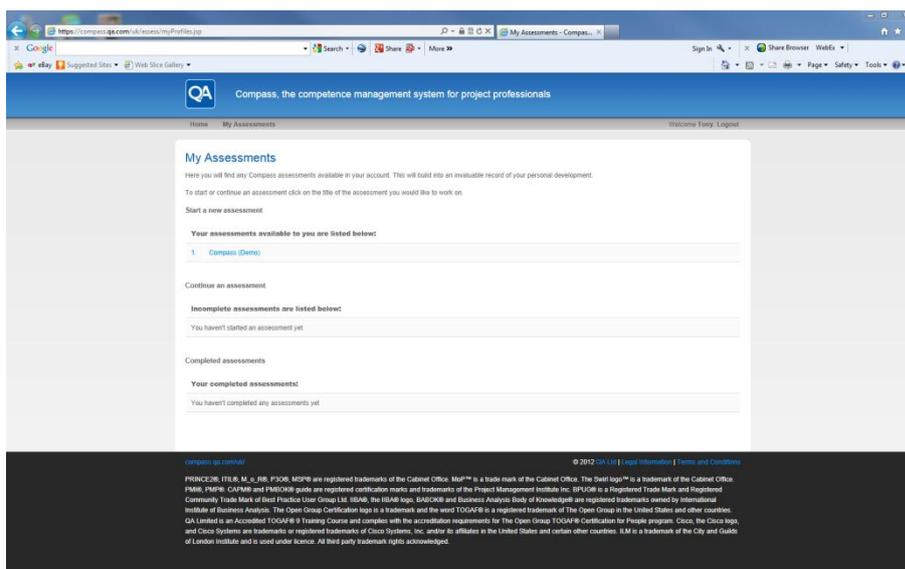
Once you have completed all the required fields, click the **Submit** button to create your account.

The following screen will be displayed:



Click on the **My Assessments** button to continue to the **My Assessments** page.

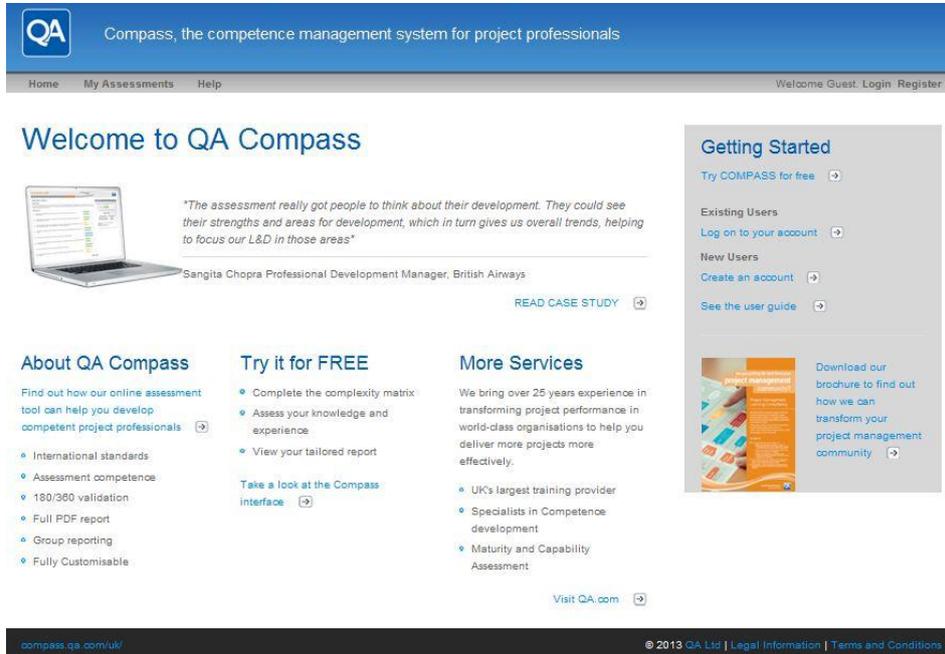
The following page will be displayed:



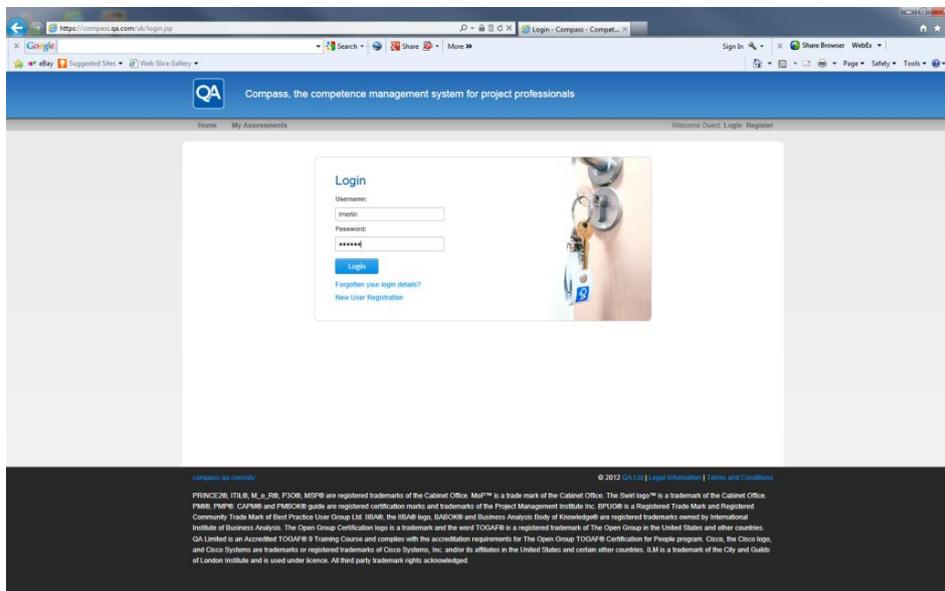
Go to Section 1.5 **Completing an assessment** to get started.

# 1.4 Log on to an existing account

From the home page, click on the **Log on to your account** link in the **Getting Started** panel on the right hand side of the screen or by clicking the **Login** link in the **navigation bar**.



The following screen will be displayed:



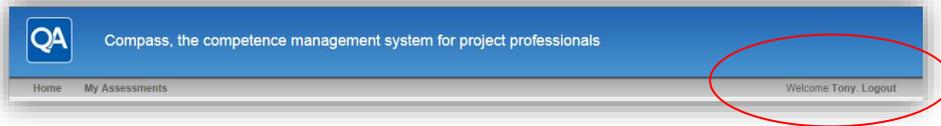
Enter your **Username** and **Password** in the required fields and click the **Login** button.

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**NOTE: If you cannot remember your password, click on the 'Forgotten your login details?' link. You will be required to enter your email address and your password will be emailed to you within a few minutes.**

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Once you have completed the login process, you will be returned to the **Home Page** and your name will appear in the navigation bar:



## 1.5 Completing an assessment

From the home page, click on the **My Assessments** link in the **navigation bar**.

The following screen will be displayed:

Compass, the competence management system for project professionals

Home My Assessments Help Welcome mickey Logout

### My Assessments

Here you will find any Compass assessments available in your account. This will build into an invaluable record of your personal development.

To start or continue an assessment click on the title of the assessment you would like to work on.

**Start Questionnaire**

Start a new assessment **1**

Your assessments available to you are listed below:

1.	COMPASS
----	---------

Update an assessment **2**

Work in progress assessments are listed below:

Reference No	Assessment	Date Started (asc)
You haven't started an assessment yet		

Submitted assessments **3**

Your submitted assessments:

Reference No	Assessment	Date Submitted (asc)
You haven't submitted any assessments yet		

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The **My Assessments** page is split into three main areas as indicated with the arrows above

1. At the top are assessments that have not been started yet.
2. In the centre are assessments that are in progress but have not yet been completed. These can be reviewed and amended until they are submitted as complete.
3. At the bottom are assessments that have been completed and a PDF report is available.

Before you launch an assessment it is recommended that you complete the Complexity Questionnaire by clicking on the blue **Start Questionnaire** button as highlighted above.

### Complexity Questionnaire (from My Assessment page)

A key feature of COMPASS is the Complexity Questionnaire. This consists of 10 questions which are related to different aspects of projects that you have recently worked on. Each question should be answered honestly and should be based on the challenges you have encountered in projects you have worked on in the last 5 years only.

Some projects are simple in their delivery, and even some very large projects can be classed as simple if the scope and inter-activity is stable and limited. Complex projects, however, present numerous challenges through many interrelated sub-projects, a high degree of change, or multiple inter-activities with the wider organisation.

**NOTE: If you have only worked on simple (or non-complex) projects, then you will only be able to score yourself on a scale of 1-5 for each competence.**

If you are a new user you will not yet have completed the Complexity Questionnaire and by clicking on the [Start Questionnaire](#) button you will see the following screen.

The screenshot shows the 'Complexity Questionnaire' page in the Compass system. The header includes the QA logo and the text 'Compass, the competence management system for project professionals'. Below the header is a navigation bar with 'Home', 'My Assessments', and 'Help' on the left, and 'Welcome mickey, Logout' on the right. The main content area is titled 'Complexity Questionnaire' and contains introductory text. Below the text is 'Question 1 of 10' and a table for selecting answers. The table has columns for 'Significant complexity' (strongly agree, agree) and 'Limited complexity' (disagree, strongly disagree). The rows list various criteria like 'Mandate and objective', 'Conflicting objectives', etc. A 'Next Question' button is at the bottom right of the table area. The footer shows the URL 'compass.qa.com/qaq/' and copyright information '© 2013 QA Ltd | Legal Information | Terms and Conditions'.

1. Objectives, Assessment of Results	Significant complexity		Limited complexity	
	strongly agree	agree	disagree	strongly disagree
Mandate and objective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conflicting objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transparency of mandate and objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interdependence of objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number and assessment of results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Click on the radio buttons to select your answer and click the [Next Question](#) button.

As you move through the questionnaire, you are able to go back and review your answers by clicking the [Previous Question](#) button.

When you have completed all 10 questions you will be taken back to the **My Assessments** page.

A message will be displayed and a statement to signify whether you have worked on complex projects or not. If you have worked on complex projects, then you will be able to score from 1-10 for each competence in the assessment, otherwise you will only be able to score 1-5.

You are now ready to launch an assessment.

## Launching an assessment

To launch a new assessment or review and amend an assessment you have started, simply click on the assessment title on the My Assessments page.

Please see the following sample page and note the following:

- Having done the complexity questionnaire once the [Start Questionnaire](#) button changes to a [Retest](#) button
- The 'Start a new assessment' section may differ depending on how assessments have been made available to you.

QA Compass, the competence management system for project professionals

Home My Assessments Help Welcome Mike. Logout Admin Section

### My Assessments

Here you will find any Compass assessments available in your account. This will build into an invaluable record of your personal development.

To start or continue an assessment click on the title of the assessment you would like to work on.

**Complexity Questionnaire**

Records show that you have already completed a Complexity Questionnaire for the Compass Assessment. Overall, your experience shows that the projects you have worked on are deemed to be complex allowing to score competence indicators at or above 6 points in the assessment.

Retest

**Start a new assessment**

Your assessments available to you are listed below:

Update existing assessment from the list:

**Update an assessment**

Work in progress assessments are listed below:

Reference No	Assessment	Date Started (asc)
1. MIKE.KIBBLEWHITE_28054	Compass (Demo)	Wed 27 Mar 2013 13:28
2. MIKEKIBBLEWHITE_28121	Compass (Demo)	Thu 25 Apr 2013 15:33

**Submitted assessments**

Your submitted assessments:

Reference No	Assessment	Date Submitted (asc)
1. MIKE.KIBBLEWHITE_27997	Compass (Demo)	Mon 18 Mar 2013 10:20

Users will access new assessments via one of the two following methods:

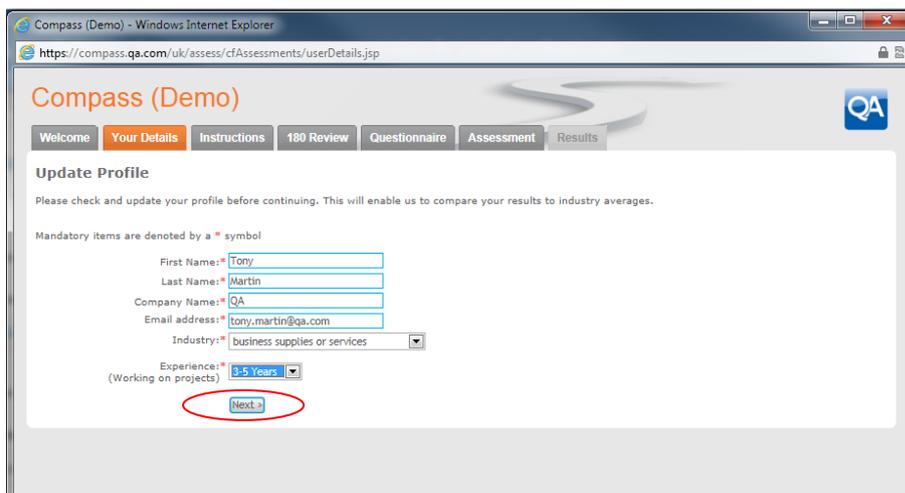
- An assessment will be assigned to you and you will see it under the 'Start a new assessment' header, or
  - You can update an existing completed assessment by clicking on the 'Select one' drop down as shown in the sample image above and use this as the starting point for your next assessment (so eliminating the need to re input all your information).
- 
- **NOTE: Only one assessment update (copy) can be active at a time. Once you have selected an assessment, and until it is submitted, you can't select another to update.**
- 

If you click on a new assessment the assessment will open up in a new window and the following screen will be displayed:

**NOTE: The welcome text may have been tailored for your organisation.**

Once you have read the introductory text, click on the **Continue** button.

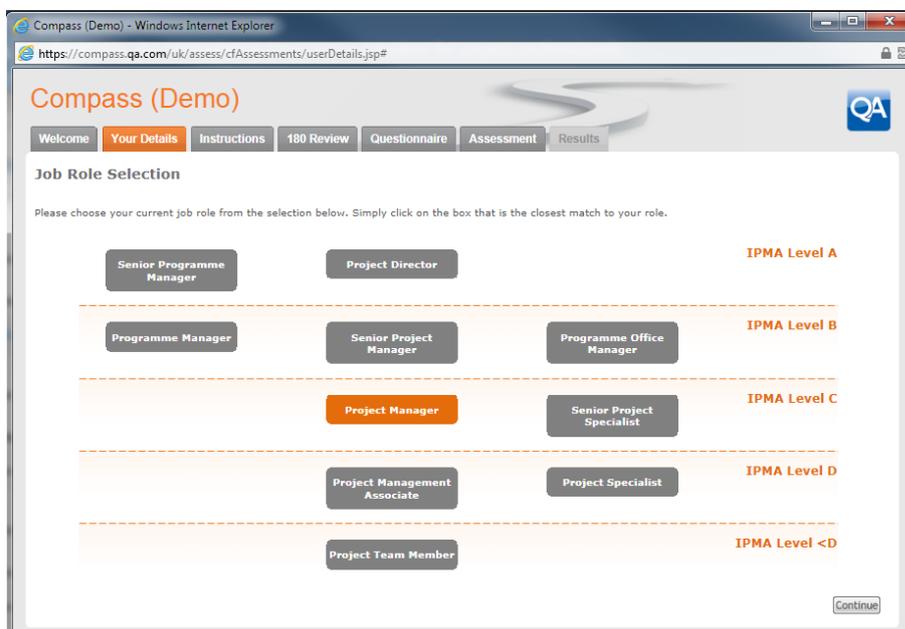
The following screen will be displayed:



Some of the details will already have been completed from your COMPASS account data, and only the Experience field will need to be completed using the drop down options. When you have checked and completed the required fields, click the **Next >** button to continue.

The following screen will be displayed:

## Selecting a Job Role



**NOTE: Job roles and descriptions may be tailored to suit your organisation, and may have more or less roles that pictured above.**

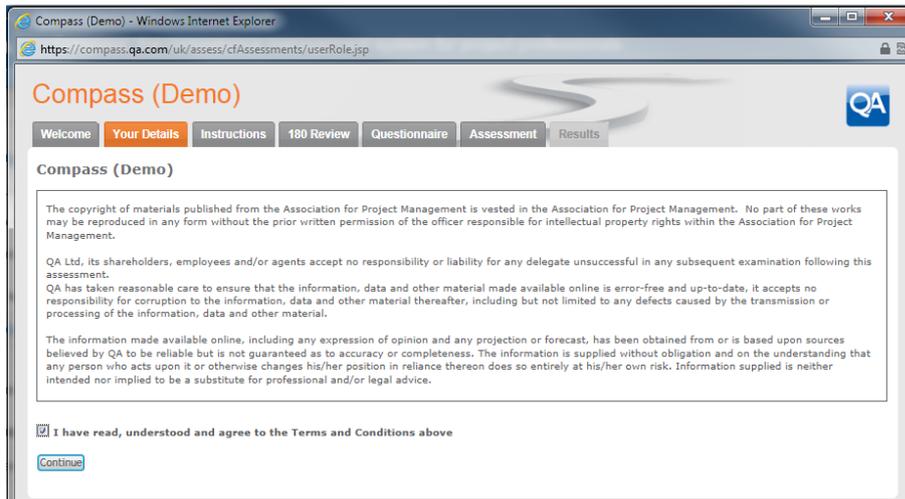
By placing your mouse over each role, you will see a pop-up displayed which gives a description of each role as shown below:

**Project Manager**

A Project Manager shall be able to manage projects with limited complexity and/or to assist the manager of a complex project programme in all competence elements of project management (core competence). Applies common project management processes, methods, techniques and tools.

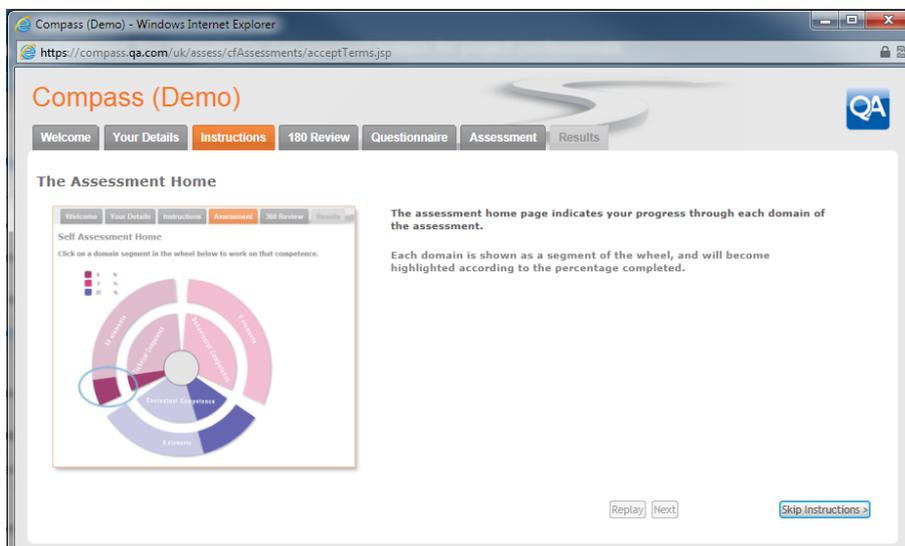
Once you have selected your current role by clicking on the job title to highlight it, click the **Continue** button.

The following screen will then be displayed:



Once you have read the Terms and conditions, check the box to agree and click the **Continue** button.

The following screen will be displayed:



The instructions are in the format of short animated sequences and can be viewed using the **Next** or **Replay** buttons. If you do not wish to watch the animations, then you can use the **Skip Instructions >** button to jump to the next screen.

## Line Manager (or appointed assessor) invitations

**NOTE: If your organisation has not chosen to have 180 Reviews (Line Manager or appointed assessor) then the following screen will not be shown. Alternatively, if 360 Reviews have been chosen, then additional fields will be shown to allow up to 4 peers and direct reports to be invited.**

Compass (Demo) - Windows Internet Explorer  
https://compass.qa.com/uk/assess/cfAssessments/startAssessment.jsp?Message=startNewEvaluationRequest

Compass (Demo) QA

Welcome Your Details Instructions **180 Review** Questionnaire Assessment Results

### 180 Review

As part of the 180° review your line manager will be requested to complete an assessment for you.  
This is done independently of your personal assessment and they will not see the scores that you have entered.  
You can re-visit this page at any time by clicking the '180 Review' tab at the top of the screen should you not want to invite anyone new. [Skip this for now.](#)

Please enter your Line Manager's details below:  
Mandatory items are denoted by a \* symbol

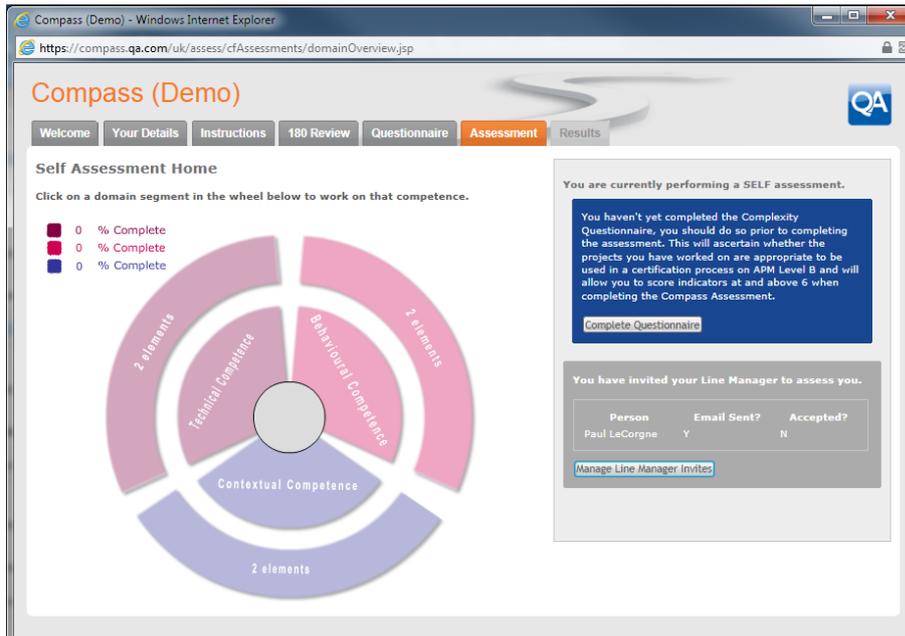
Name: \* Paul LeCorgne Email: \* paullecorgne@qa.com

To invite your Line Manager (or appointed assessor) to complete a 180 Review, simply enter their name and email address and click the  button.

An email will be automatically sent to your Line Manager (or appointed assessor) containing a link to the 180 Review (see section on 180 Review for more information).

If you do not wish to invite anyone at this time, click the **Skip this for now** link to jump to the next screen:

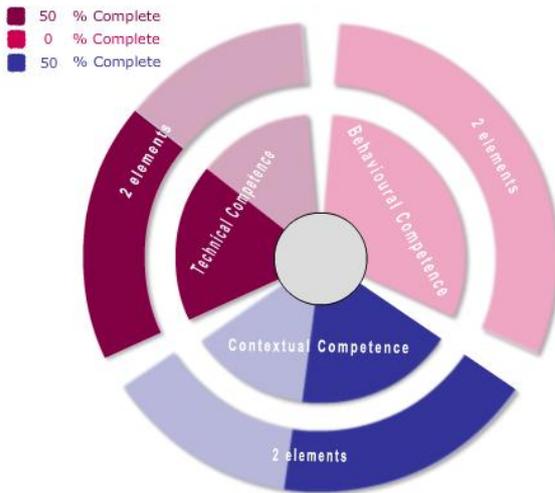
## Assessment Home Page



On the left hand side of the assessment home page is the Wheel of Competence which provides navigation to each of the assessment domain or topic area. Clicking on the segment will take you to the questions for that domain or topic area.

**NOTE: Each individual competence is called an “element” and a group of related competences are called a “domain”.**

As you complete the assessment questions, the Wheel of Competence will start to fill up and indicate how far you have progressed, as shown in example in the picture below.



**NOTE: If your organisation has tailored COMPASS, the Wheel of Competence may have more or less segments than are shown in the example and the titles may be different.**

## Complexity Questionnaire (from within assessment)

If you have not yet completed the Complexity Questionnaire you can do it now. This consists of 10 questions which are related to different aspects of projects that you have recently worked on. Each question should be answered honestly and should be based on the challenges you have encountered in projects you have worked on in the last 5 years only.

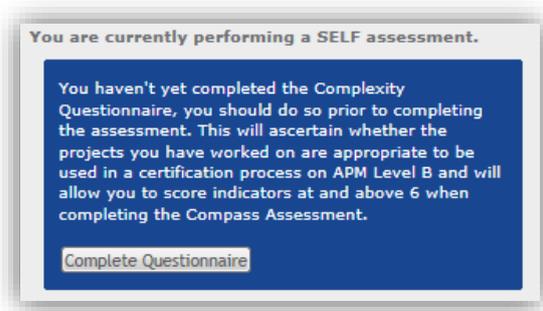
Some projects are simple in their delivery, and even some very large projects can be classed as simple if the scope and inter-activity is stable and limited. Complex projects, however, present numerous challenges through many interrelated sub-projects, a high degree of change, or multiple inter-activities with the wider organisation.

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**NOTE: If you have only worked on simple (or non-complex) projects, then you will only be able to score yourself on a scale of 1-5 for each competence.**

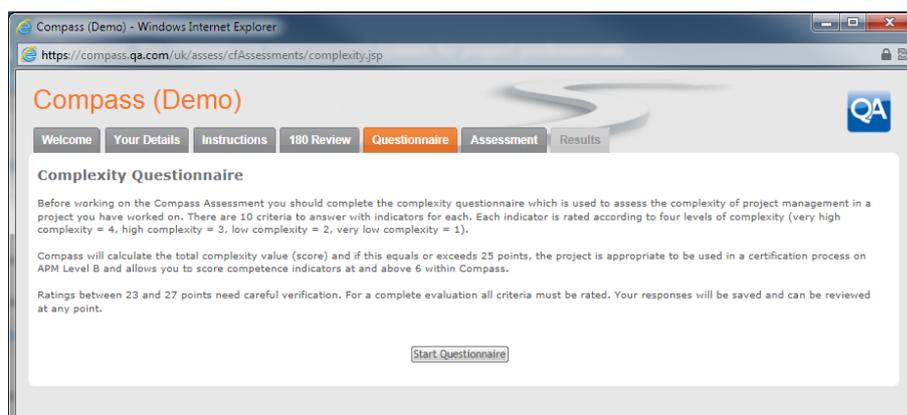
---

If you have not yet completed the Complexity Questionnaire, the following message will be displayed on the right hand side of the screen:



To start the Complexity Questionnaire, click the **Complete Questionnaire** button.

The following screen will be displayed:



Once you have read the introductory text, click the **Start Questionnaire** button to continue.

The following screen will be displayed.

**Complexity Questionnaire**

Before working on the Compass Assessment you should complete the complexity questionnaire which is used to assess the complexity of project management in a project you have worked on. There are 10 criteria to answer with indicators for each. Each indicator is rated according to four levels of complexity (very high complexity = 4, high complexity = 3, low complexity = 2, very low complexity = 1).

Compass will calculate the total complexity value (score) and if this equals or exceeds 25 points, the project is appropriate to be used in a certification process on APM Level B and allows you to score competence indicators at and above 6 within Compass.

Ratings between 23 and 27 points need careful verification. For a complete evaluation all criteria must be rated. Your responses will be saved and can be reviewed at any point.

**Question 1 of 10**

	Significant complexity		Limited complexity	
	complexity very high	complexity high	complexity low	complexity very low
<b>1. Objectives, Assessment of Results</b>				
Mandate and objective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conflicting objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transparency of mandate and objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interdependence of objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number and assessment of results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Next Question](#)

Click on the radio buttons to select your answer and click the [Next Question](#) button.

As you move through the questionnaire, you are able to go back and review your answers by clicking the [Previous Question](#) button.

When you have completed all 10 questions, the following screen will be displayed:

**Questionnaire Complete**

Thank you for completing the Complexity Questionnaire.

Your total score is: 20

The project you have assessed yourself on is not deemed to be complex to be used in a certification process against APM Level B and you will be limited to scoring Knowledge and Experience indicators between 0-5 in this Compass Assessment.

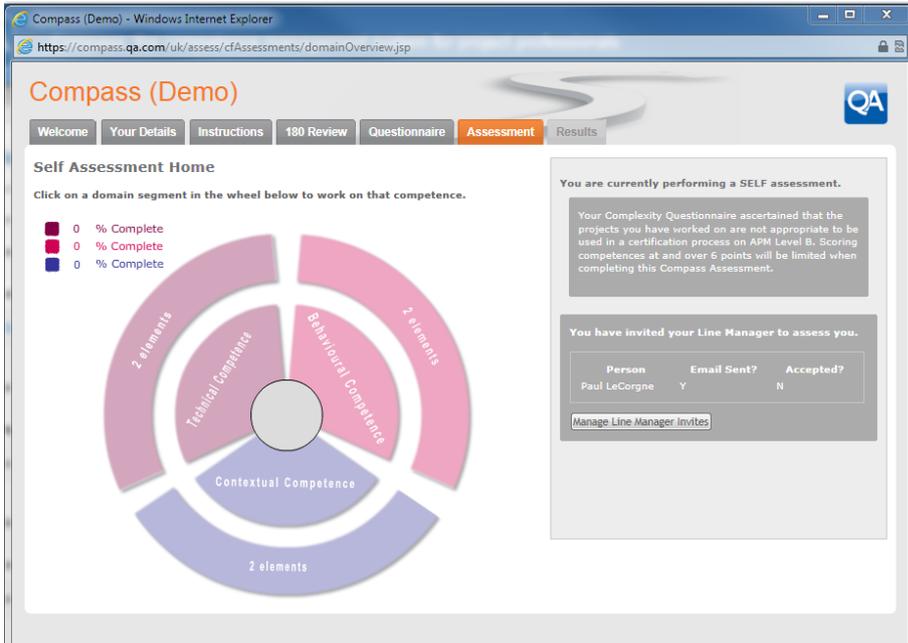
[Continue to the Assessment..](#)

A score will be displayed and a statement to signify whether you have worked on complex projects or not.

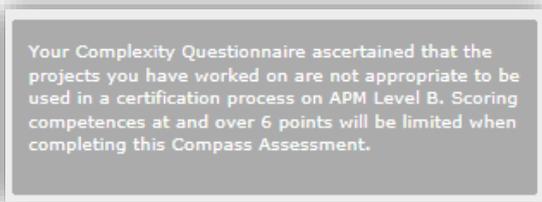
If you have worked on complex projects, then you will be able to score from 1-10 for each competence in the assessment, otherwise you will only be able to score 1-5.

When you are ready to proceed, click the [Continue to the Assessment..](#) button.

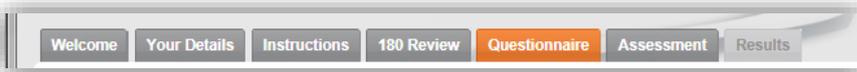
You will be returned to the assessment home page.



On the right hand side will now be displayed a message relating to your complexity questionnaire score:

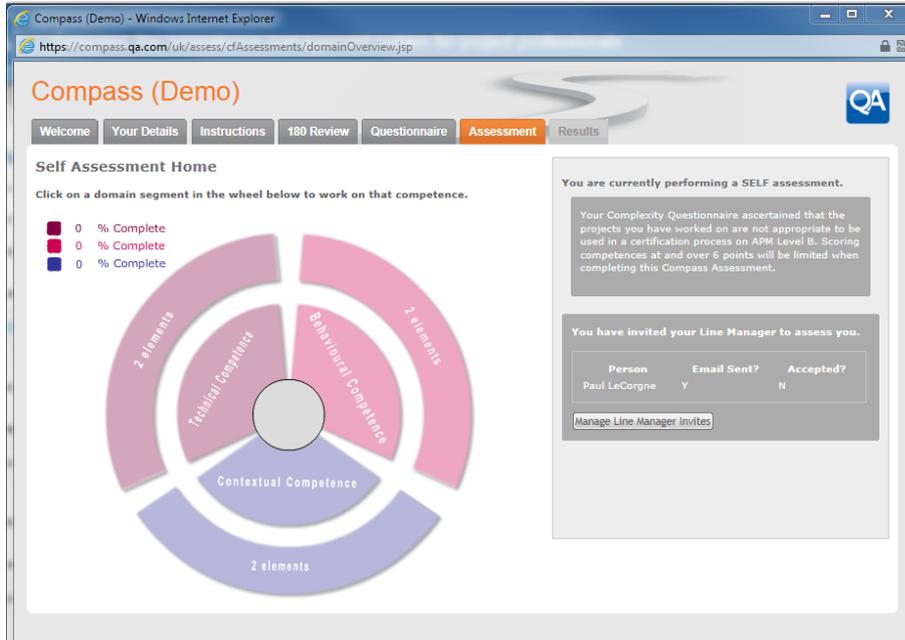


If you wish to amend your answers in the Complexity Questionnaire at any time, then you can click the Questionnaire Tab at the top of the screen and make any necessary amendments:

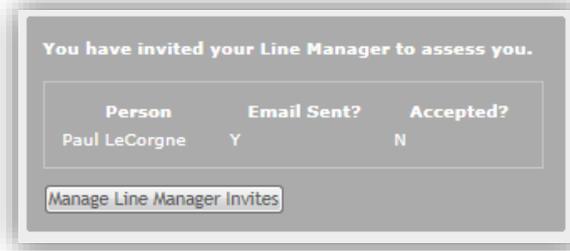


## Revoking a Line Manager invitation.

You will note that also on the right hand side of the Assessment Home Page, there is indication of the current status of any 180 or 360 reviews.

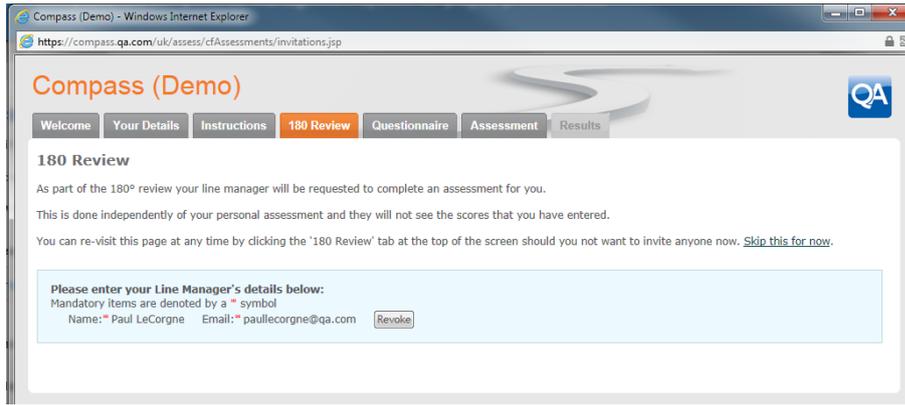


In this example, a Line Manager has been sent an invitation email, but has yet to accept and complete the assessment as shown in the dashboard area.



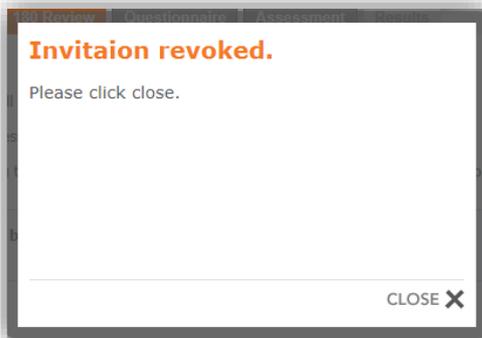
If you wish to amend or change the Line Manager (or appointed assessor) invitation, then click on the **Manage Line Manager Invites** button.

The following screen will be displayed:

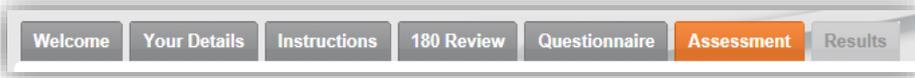


If you wish to edit or change the invitation, then it must be cancelled and then a new invitation sent. To cancel the invitation click on the **Revoke** button.

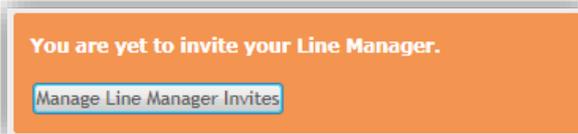
The following message will be displayed:



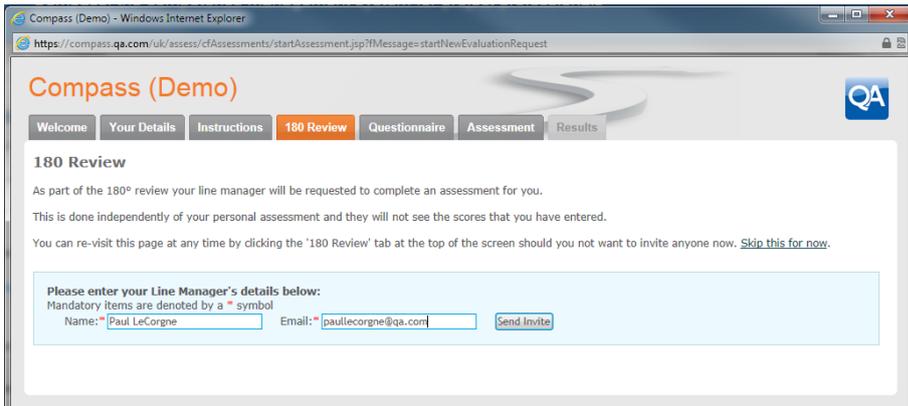
You will then need to click the Assessment tab at the top of the screen to return to the Assessment Home Page.



On the right hand side of the Assessment Home Page will be displayed the following message.



Clicking the following **Manage Line Manager Invites** button will take you to the following screen where you can create a new invitation to your Line Manager (or appointed assessor):

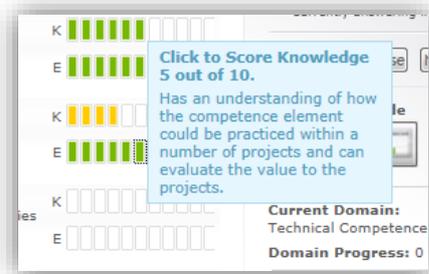




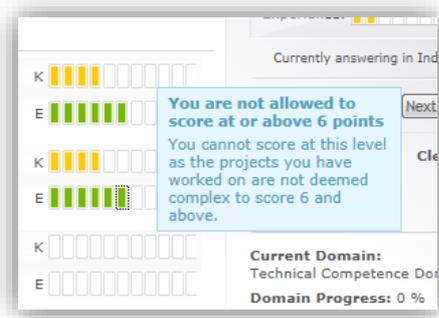
At the top of the screen is the competence title followed by a short definition of the competence. Below that are the indicators which support the assessment by showing how the competence may be applied to a project. There may be a different number of indicators for each competence.

For each competence indicator you are required to score for Knowledge (K) and Experience (E) and moving your mouse over the slider-bars will show a pop-up description of what is expected at this score.

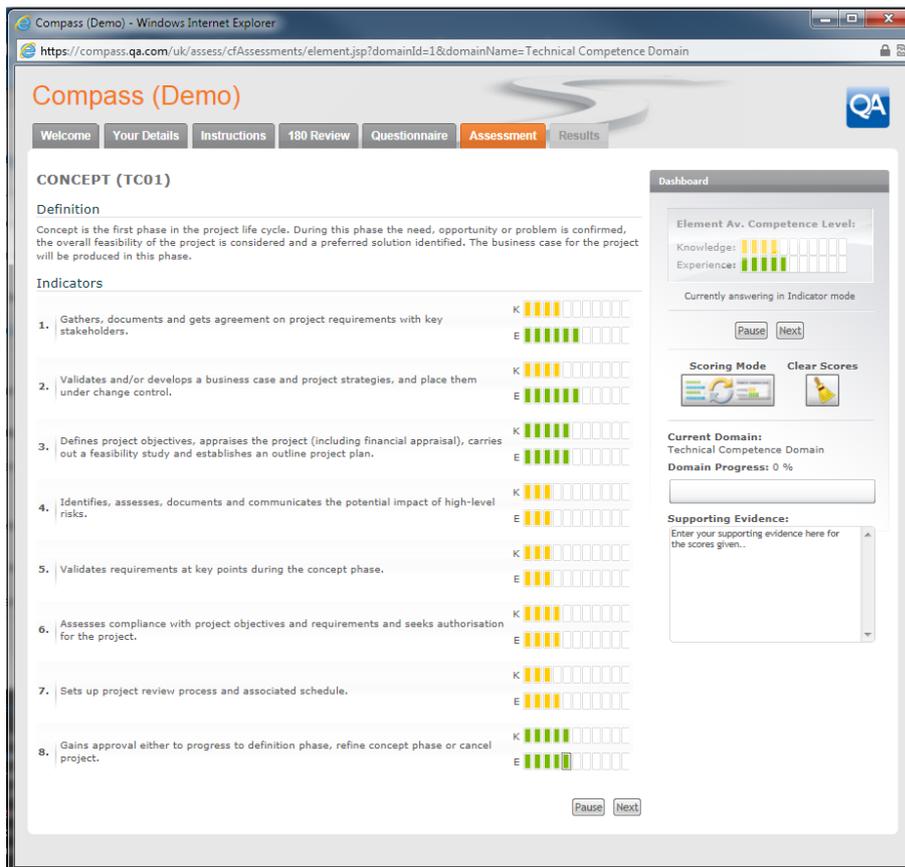
For example:



If you get the following message for scores 6 and above, then it is because either you have not completed the complexity questionnaire, or your score in the complexity questionnaire indicated you have not worked on complex projects.



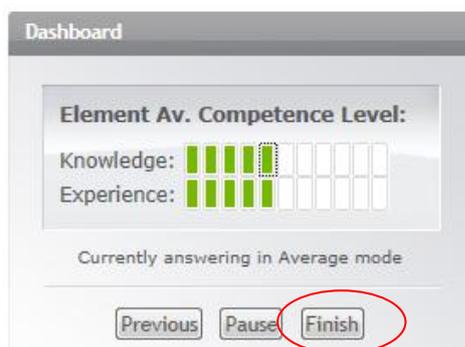
The following screenshot shows that each indicator has had a score selected. You will note that the dashboard on the right hand side is now showing the average of the scores.



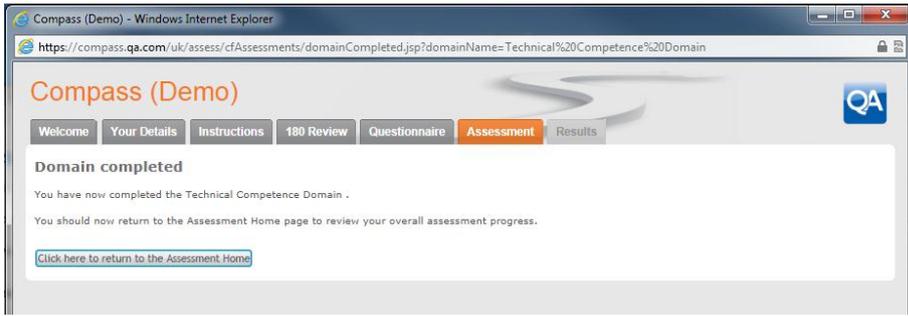
You will also note the 'Supporting Evidence' field to the bottom right. This is a text only field that allows you to make notes re any evidence you want noted against the competency scoring. As an example you may write 'Please note I have done much work on the Concept stage and you can see my evidence in the P drive under ProjectX / Initiation.'

If you have finished entering all the scores, you can move onto the next Competence by clicking the **Next** button.

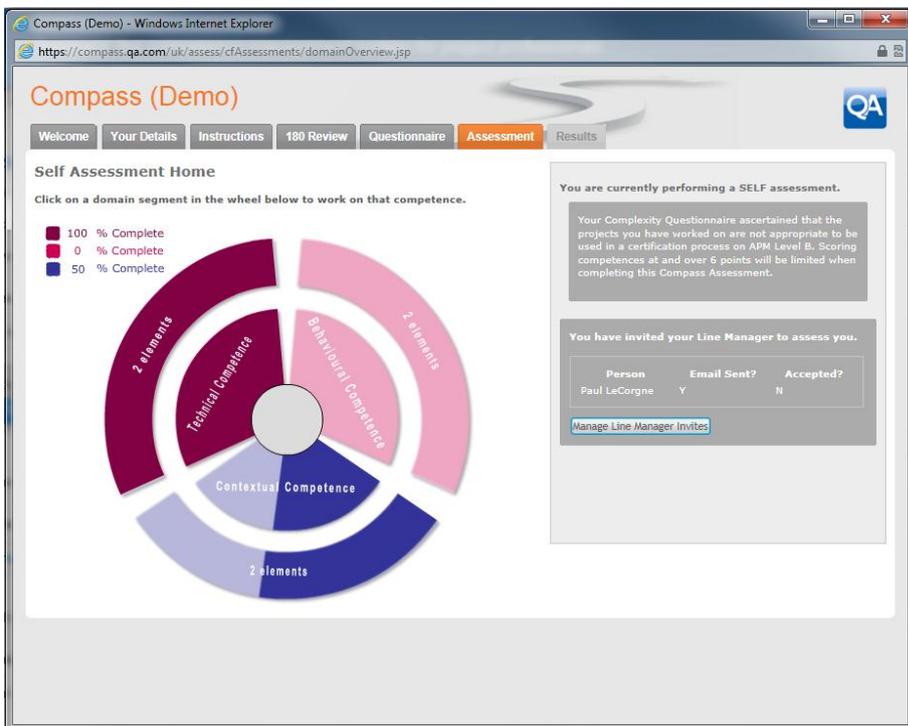
When you have completed all the competences in a domain a **Finish** button will be displayed in the Dashboard area as shown below:



Clicking the **Finish** button will display the following screen confirming you have completed all the competences in that domain:

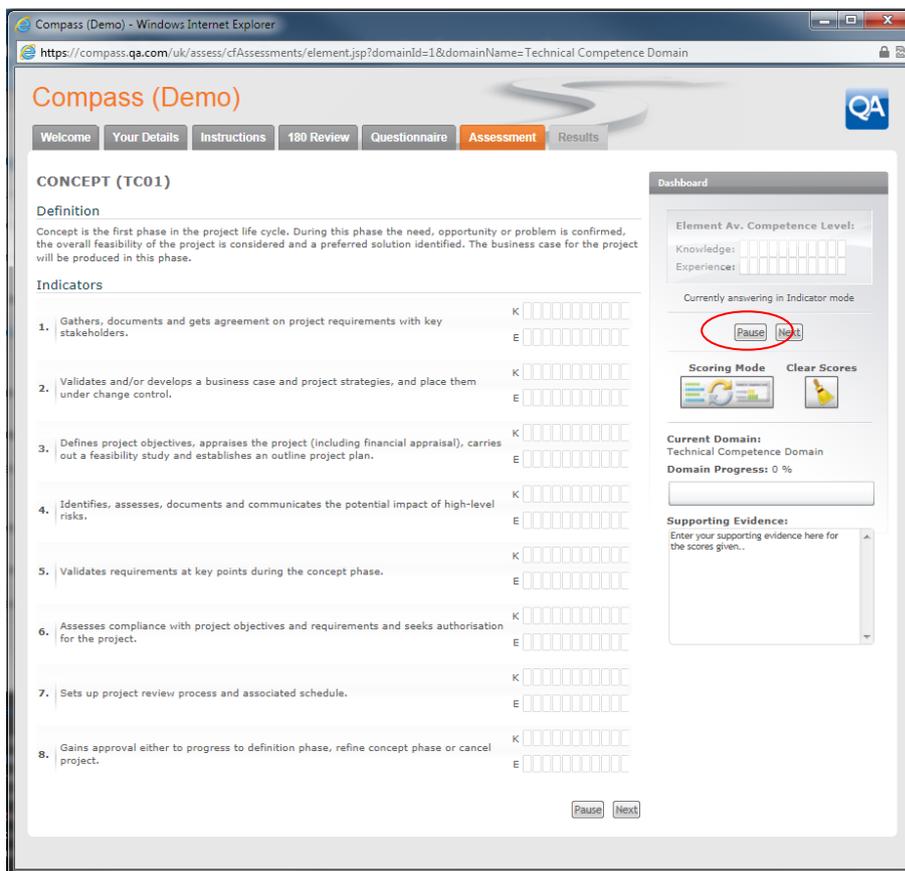


Click the [Click here to return to the Assessment Home](#) button to return to the Assessment Home Page where the Wheel of Competence will be updated to indicate that domain is now complete.

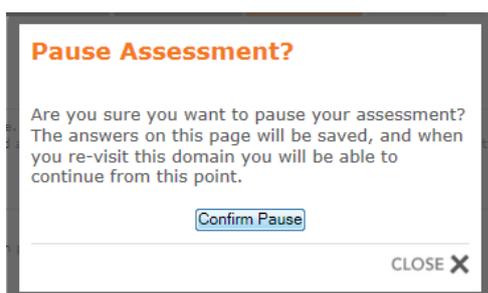


## Pausing the Assessment

If you wish to leave the assessment and return to it later then you can click the **Pause** button located in the dashboard area.



A message will be displayed:



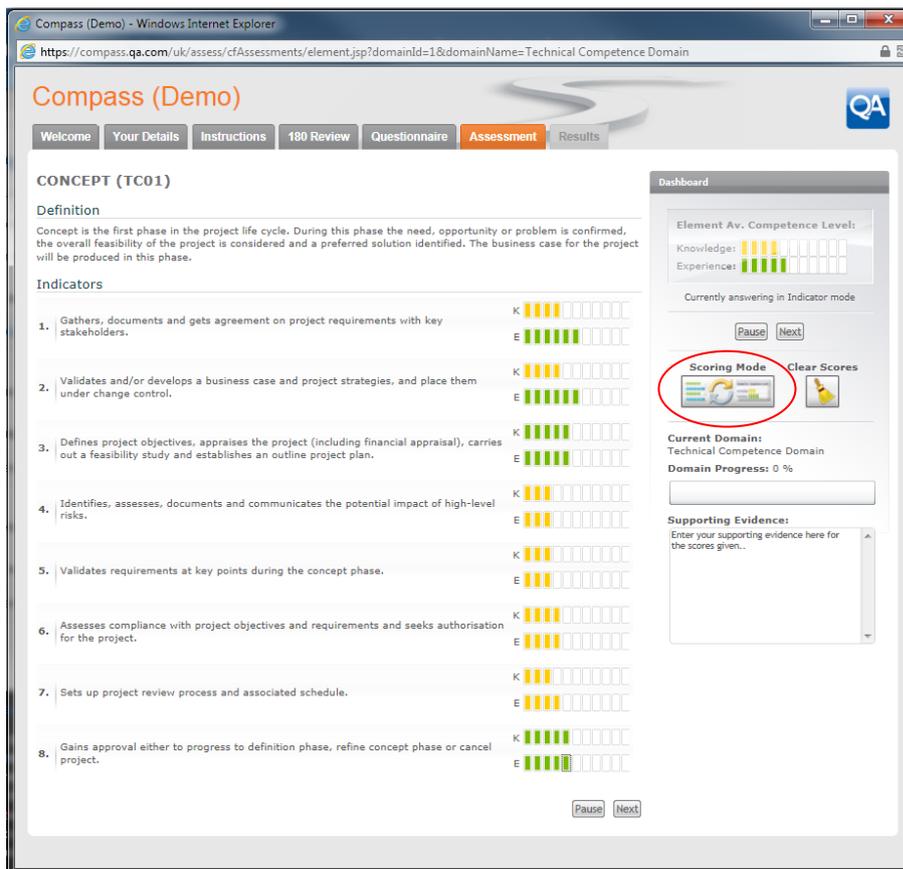
Click the **Confirm Pause** button to stop the assessment and save your results so far, or click the close button to continue the assessment.

## Switching scoring modes

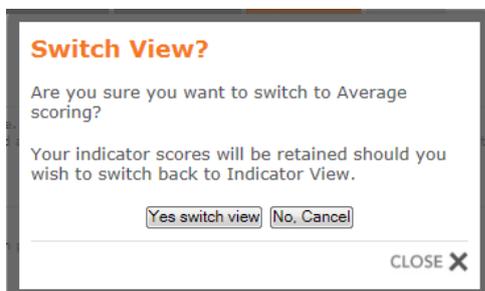
COMPASS has the ability to switch scoring modes from the detailed indicator scoring to an average scoring mode.

**NOTE: By default, the detailed scoring mode is selected initially for the user, and the average scoring mode is selected initially for the Line Manager (or appointed assessor), who may have a number of staff to assess.**

From the competence screen, click the  button:

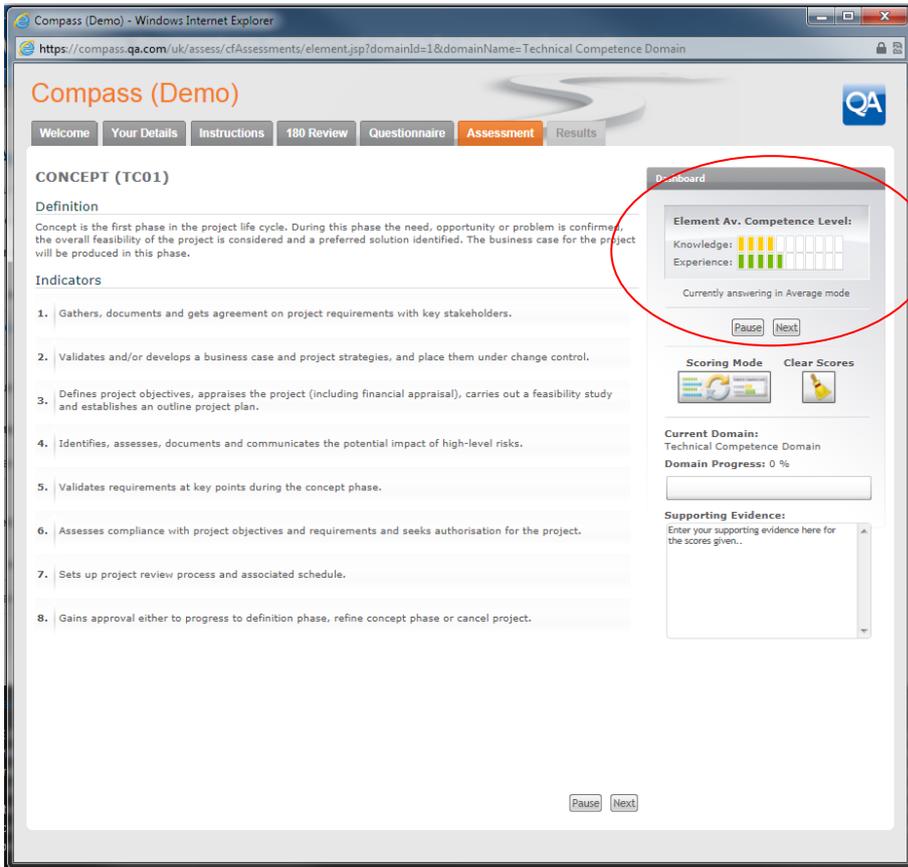


The following message will appear:



Click the **Yes switch view** button to change the scoring mode or **No, Cancel** button to return to the existing scoring mode.

If you have changed from the detailed scoring mode to average scoring mode then the following screen will appear:

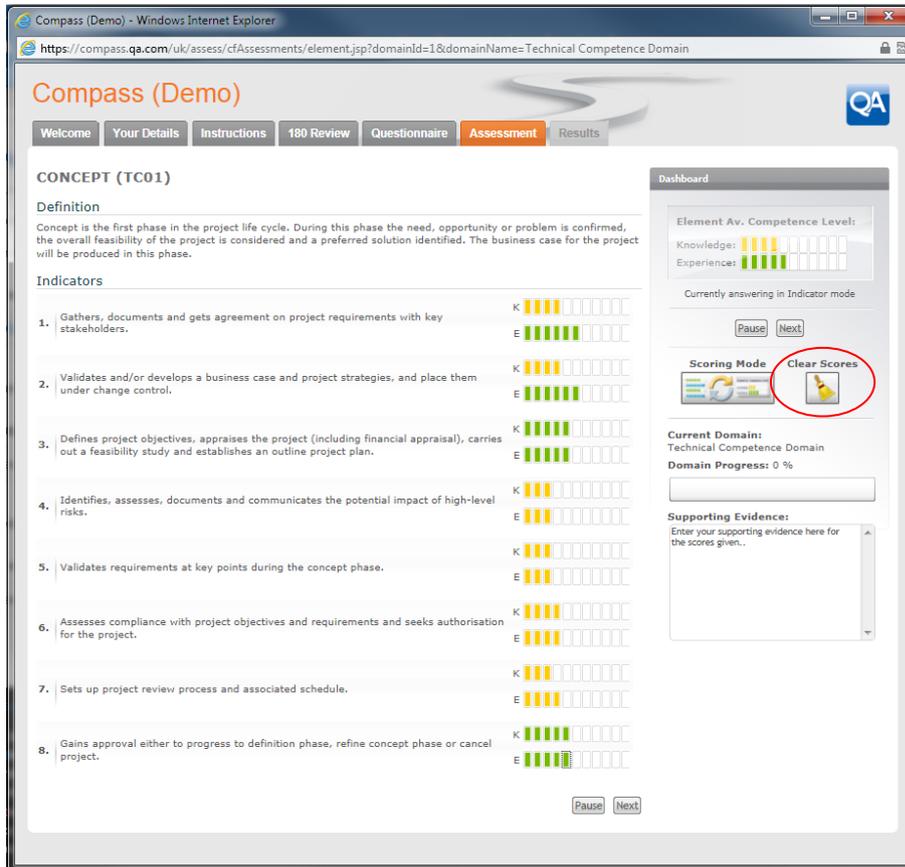


You will now be able to score Knowledge (K) and Experience (E) for the whole competence in the Dashboard area as highlighted above.

## Clearing the scores for a competence

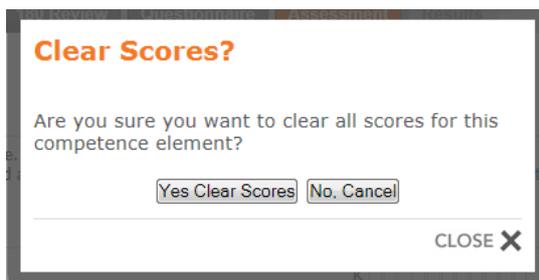
If you have completed the scores for a competence element and wish to clear all the scores, then click

the  button in the Dashboard area.



The screenshot shows the 'Compass (Demo)' assessment interface. The main content area displays the 'CONCEPT (TC01)' definition and a list of eight indicators with progress bars for Knowledge (K) and Experience (E). The right-hand 'Dashboard' panel shows 'Element Av. Competence Level' with progress bars for Knowledge and Experience, and a 'Scoring Mode' section where the 'Clear Scores' button (represented by a yellow bell icon) is circled in red. Other buttons like 'Pause' and 'Next' are also visible in the dashboard.

The following message will appear:



The dialog box has a title 'Clear Scores?' in orange. Below the title, it asks 'Are you sure you want to clear all scores for this competence element?'. At the bottom, there are two buttons: 'Yes Clear Scores' and 'No, Cancel'. A 'CLOSE X' button is located in the bottom right corner.

Click the **Yes Clear Scores** button to clear all the scores you have entered or the **No, Cancel** button to return to the existing scores.

## Finishing the assessment

Once you have completed all the domains you will see an additional message at the top of the assessment home page.

Compass (Demo) - Windows Internet Explorer  
https://compass.qa.com/uk/assess/cfAssessments/domainOverview.jsp

Compass (Demo)

Welcome Your Details Instructions 180 Review Questionnaire **Assessment** Results

Self Assessment Home

You have completed all the domains. You can review your answers by going back into domains. Once you are sure about your answers you must submit the assessment to be able to review the results. Please note once you have submitted the assessment you will not be able to change your answers.

Submit Assessment

Click on a domain segment in the wheel below to work on that competence.

100 % Complete  
100 % Complete  
100 % Complete

2 elements  
Technical Competence  
Behavioural Competence  
Contextual Competence  
2 elements

You are currently performing a SELF assessment.

Your Complexity Questionnaire ascertained that the projects you have worked on are not appropriate to be used in a certification process on APM Level B. Scoring competences at and over 6 points will be limited when completing this Compass Assessment.

You have invited your Line Manager to assess you.

Person	Email Sent?	Accepted?
Paul LeCorgne	Y	N

Manage Line Manager Invites

The following message will be displayed:

You have completed all the domains. You can review your answers by going back into domains. Once you are sure about your answers you must submit the assessment to be able to review the results. Please note once you have submitted the assessment you will not be able to change your answers.

Submit Assessment

If you are happy to continue, click the **Submit Assessment** button.

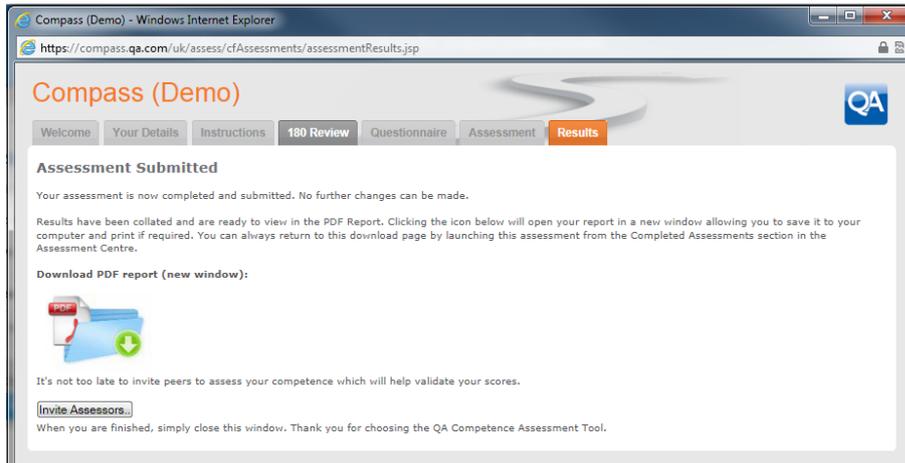
If you wish to review your scores you can click on the segment of the Wheel of competence to go directly to that domain.

---

**NOTE: Your scores are saved automatically and if you wish to close the assessment window and return to submit your scores later, then you will not lose the information you have already entered.**

---

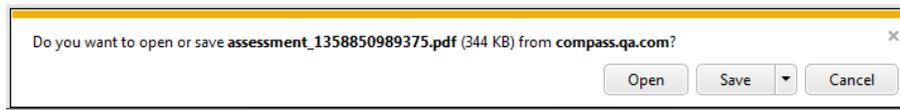
Once you have submitted your assessment the following screen will be displayed:



If you have not yet invited your Line Manager (or appointed assessor) then you can do so by clicking the **Invite Assessors..** button.

If you wish to view or download your PDF report then click the  button.

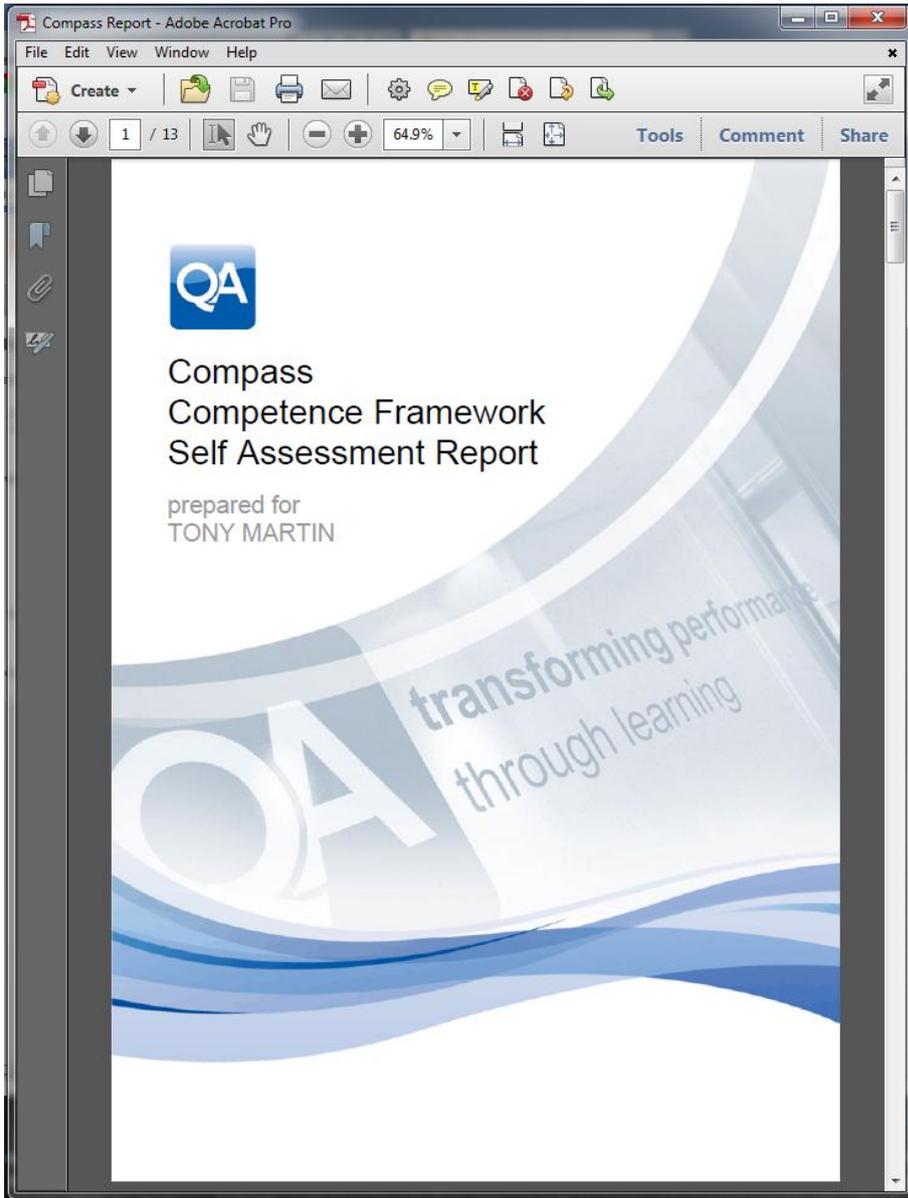
Depending on your browser, a message similar to this may be displayed:



You can choose to save the file for reading later, or select Open to view it now.

Your PDF report contains a comprehensive overview of your assessment results aligned to recognised standards from the Association of Project Management (APM). If your Line manager (or appointed assessor) has not yet completed their assessment of you then you will see only our scores on the report.

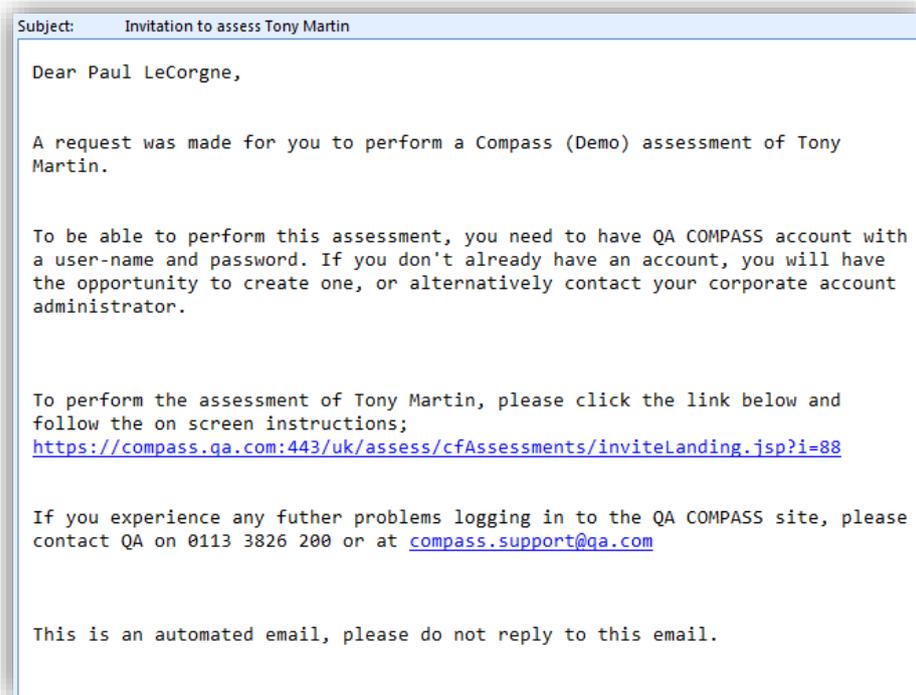
When they have completed their assessment of you, you will be able to download an updated report showing their scores against your own.



## 1.6 COMPASS for Line Managers

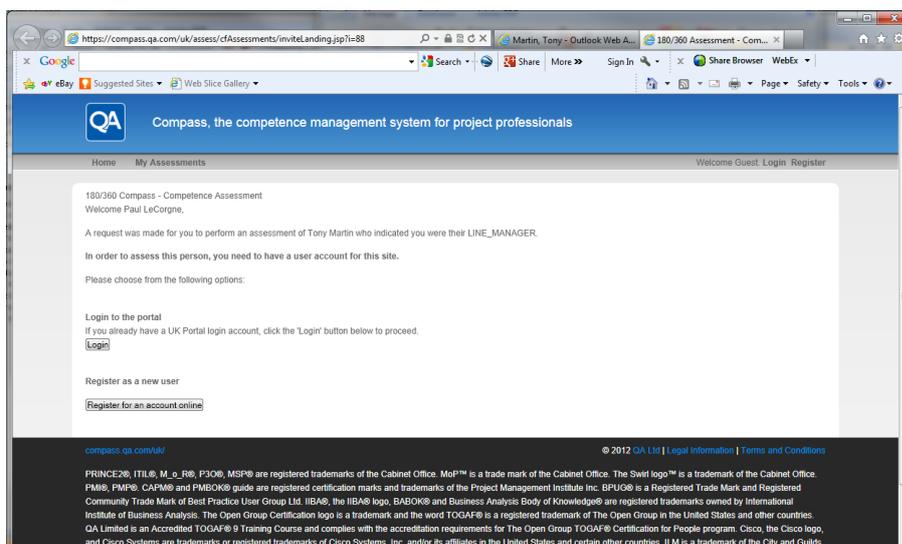
If you have been invited to assess a member of staff or a colleague then you will have been sent an email containing a link to COMPASS.

### Invitation email



Click on the link contained within the email to continue to the assessment.

The following screen will be displayed:

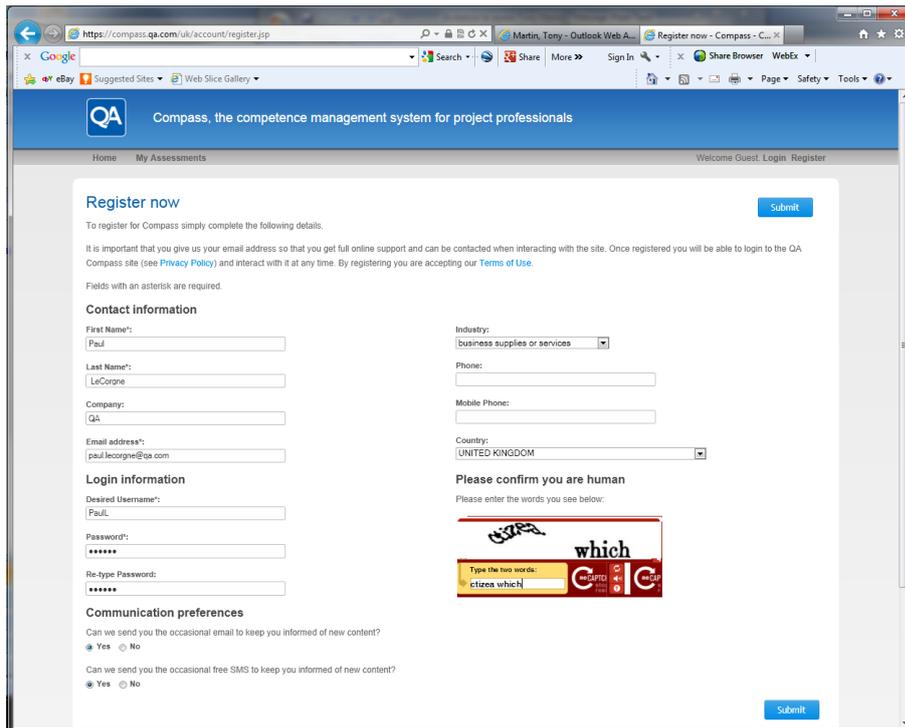


If you have not used COMPASS before then you will be required to register an account by clicking the **Register for an account online** button.

If you already have a COMPASS account because you have assessed another member of staff or you have completed your own assessment then click the **Login** button to access your account.

## Register for an account

Clicking the **Register for an account online** button will display the following screen:



As a new user, you are required to complete some basic details for your COMPASS profile, so enter your details as required. Fields marked with an asterix (\*) are compulsory.

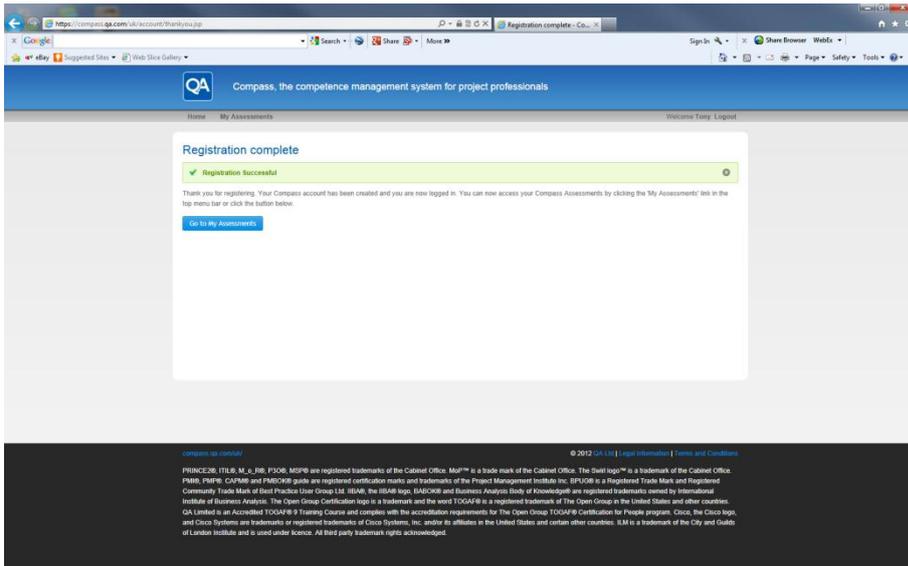
---

**NOTE: If your organisation has required additional information such as Payroll number or Location, then these additional fields will also be displayed and are compulsory.**

---

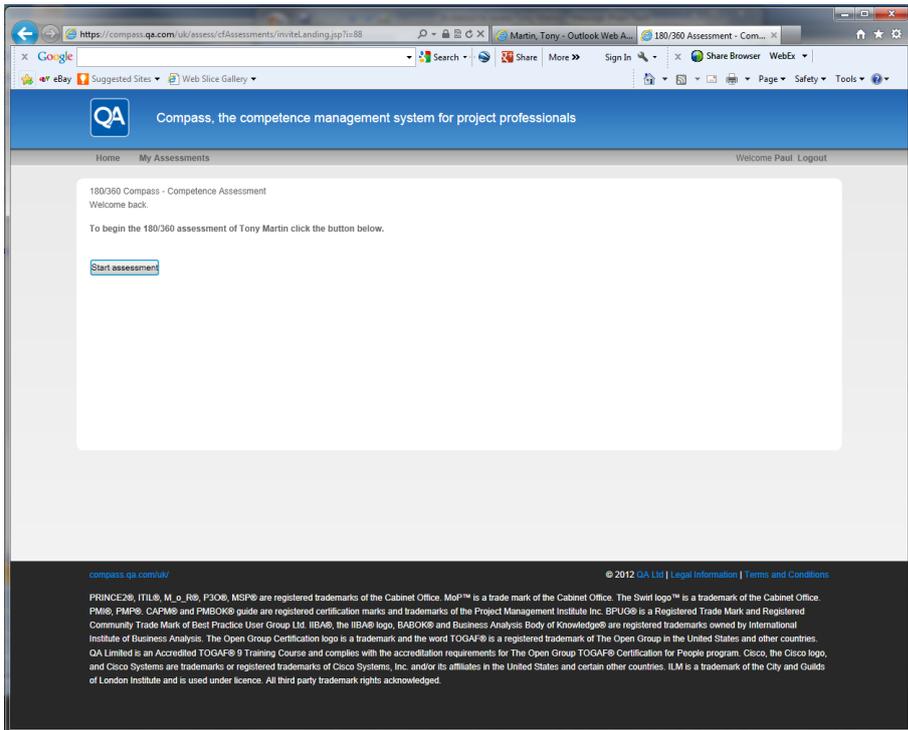
Once you have completed all the required fields, click the **Submit** button to create your account.

The following screen will be displayed:



## Existing users

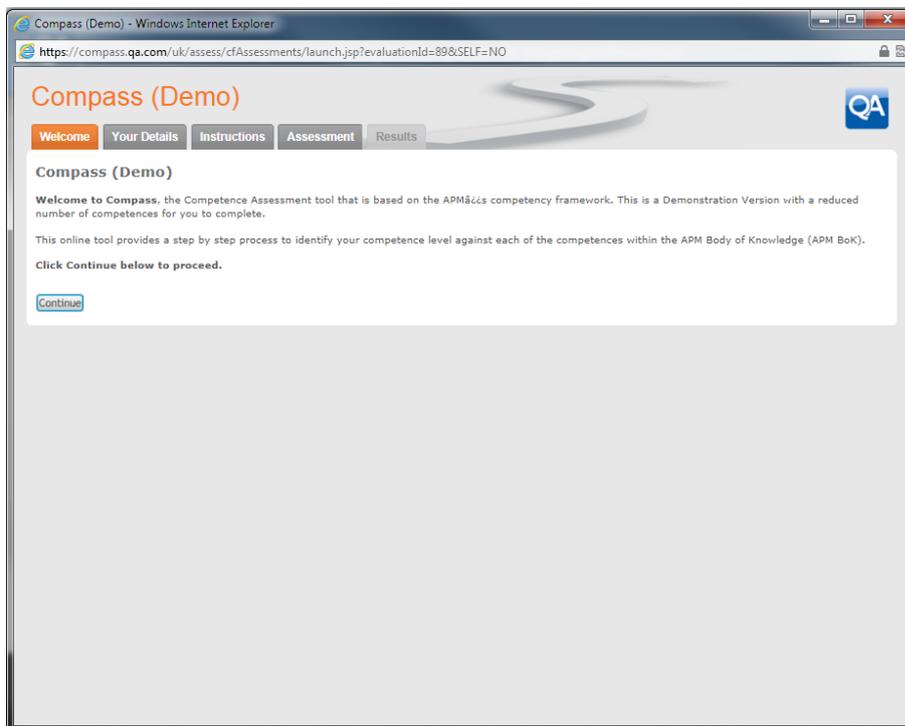
If you have previously registered an account on COMPASS, then clicking the link in the invitation email will take you to the page shown below:



To start the assessment, click the **Start assessment** button.

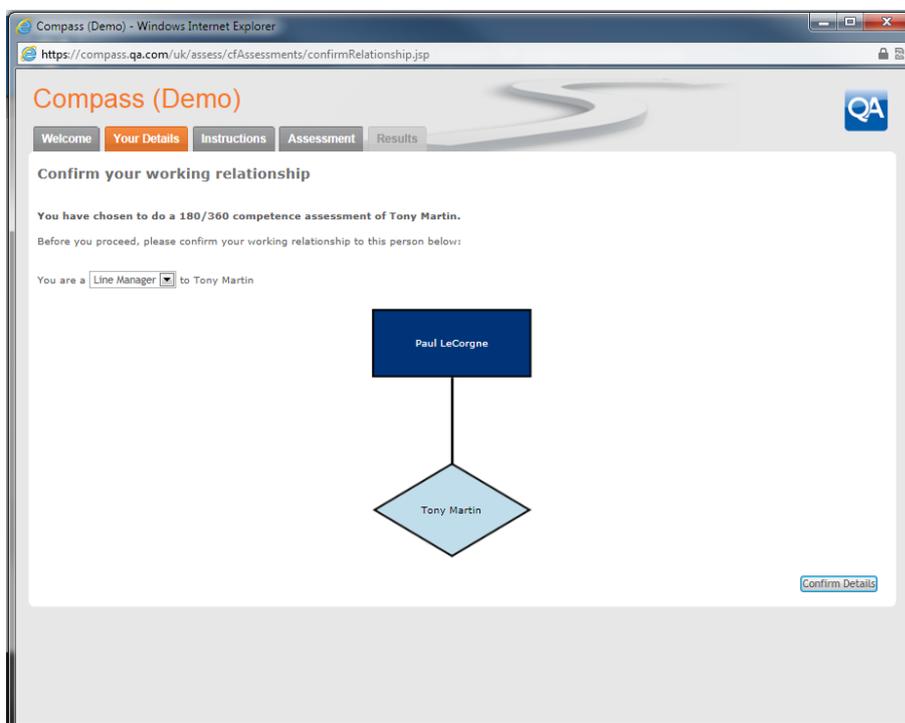
## Starting the assessment

The assessment will be displayed in a new window and you will be presented with the screen below:



Once you have read the introduction text, click the **Continue** button.

The following screen will be displayed if you are the line manager:



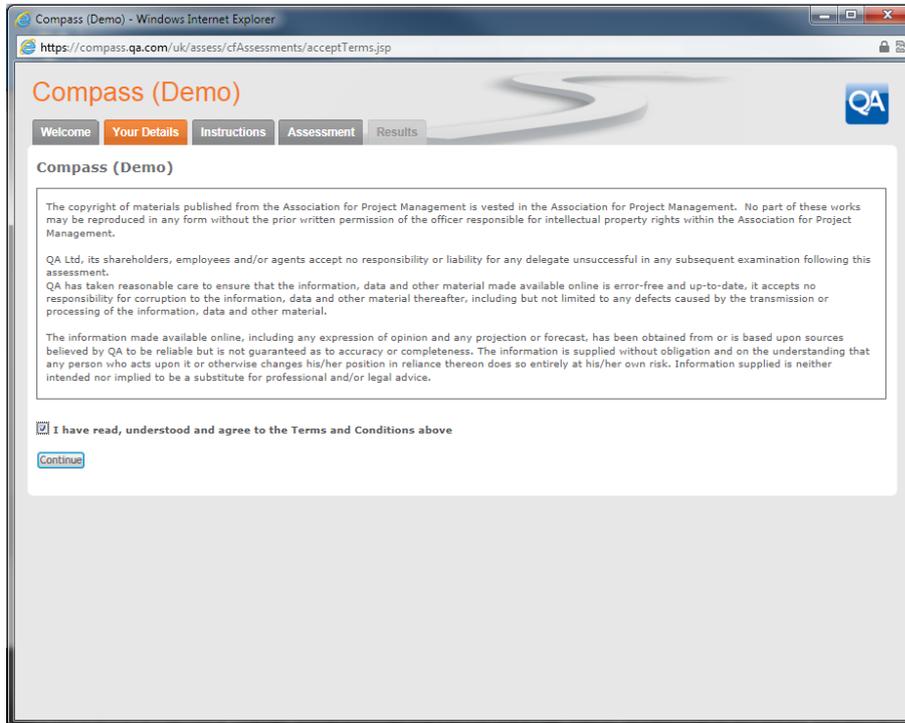
The person you are assessing will have selected you to be either a line manager, a peer, or a direct report. Your relationship will be displayed as above. If this is incorrect then you are able to use the drop down selection box to choose another relationship:

You are a Line Manager to Tony Martin

- Line Manager
- Peer
- Direct Report

Click the **Confirm Details** button to confirm your relationship.

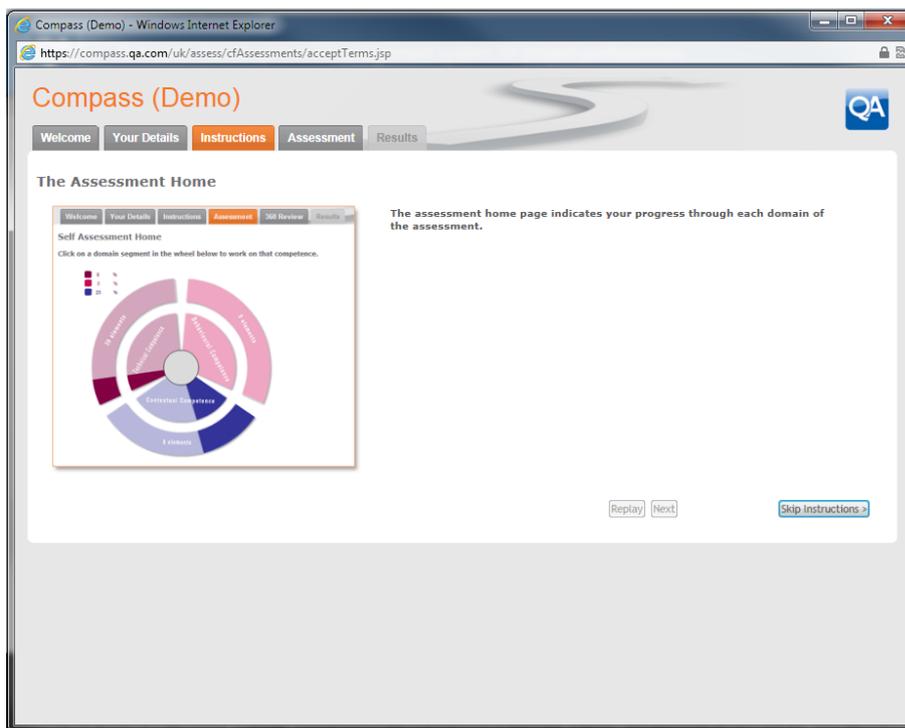
The following T's & C's screen will be displayed:



Tick the box to clarify you have read and understood the T's & C's.

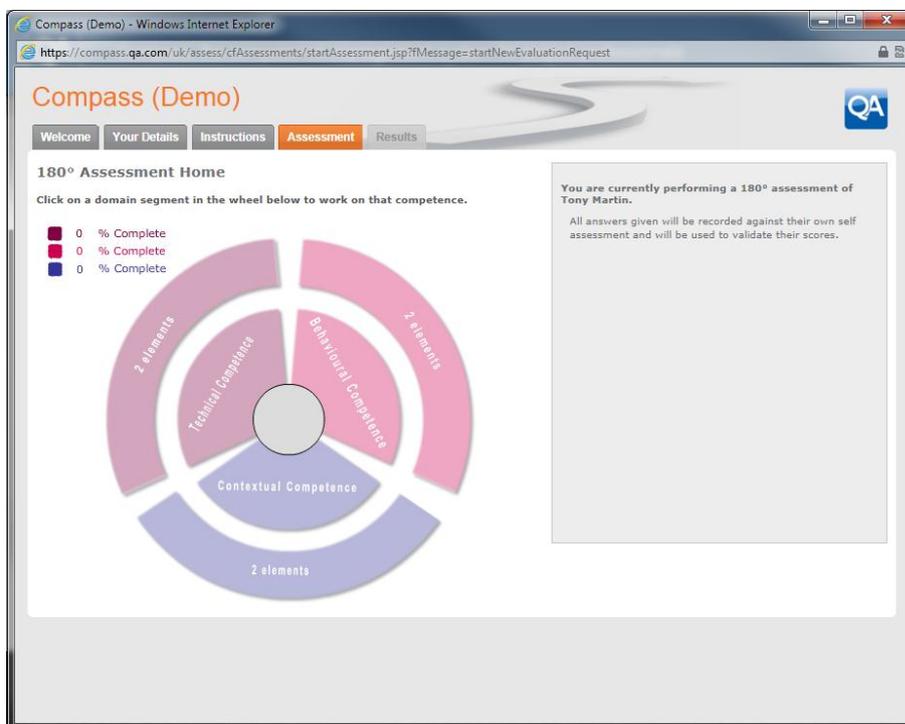
Click the **Continue** button.

You will now be taken to a new screen which provides you with a short instructions module. If you have not used COMPASS before then take a moment to watch the short instruction animations to familiarise yourself with the COMPASS interface:



Click on the **Skip Instructions >** button if you do not wish to watch the animations or click the **Replay** button to view it again. When each animation has completed, click the **Next** button to see the next screen.

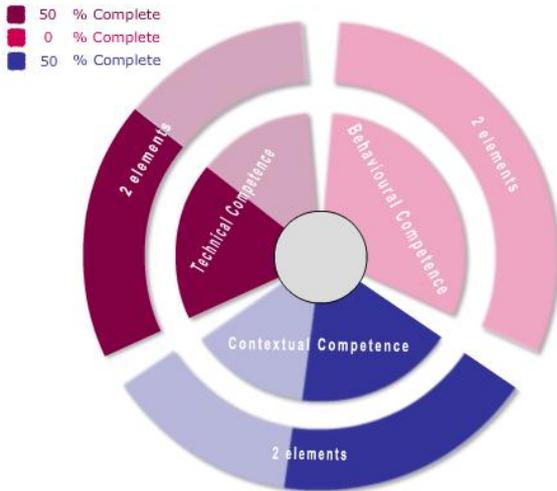
You will be presented with the assessment home page as shown:



On the left hand side of the assessment home page is the Wheel of Competence which provides navigation to each of the assessment domain or topic area. Clicking on the segment will take you to the questions for that domain or topic area.

**NOTE: Each individual competence is called an “element” and a group of related competences are called a “domain”.**

As you complete the assessment questions, the Wheel of Competence will start to fill up and indicate how far you have progressed, as shown in example in the picture below.



**NOTE: If your organisation has tailored COMPASS, the Wheel of Competence may have more or less segments than are shown in the example and the titles may be different.**

## Competence assessment questions

From the Assessment Home Page, click on a segment in the Wheel of Competence to navigate to that competence domain

The following screen will be displayed:

Compass (Demo) - Windows Internet Explorer  
https://compass.qa.com/uk/assess/cfAssessments/element.jsp?domainId=1&domainName=Technical Competence Domain

Compass (Demo) QA

Welcome Your Details Instructions **Assessment** Results

**CONCEPT (TC01)**

**Definition**  
Concept is the first phase in the project life cycle. During this phase the need, opportunity or problem is confirmed, the overall feasibility of the project is considered and a preferred solution identified. The business case for the project will be produced in this phase.

**Indicators**

1. Gathers, documents and gets agreement on project requirements with key stakeholders.
2. Validates and/or develops a business case and project strategies, and place them under change control.
3. Defines project objectives, appraises the project (including financial appraisal), carries out a feasibility study and establishes an outline project plan.
4. Identifies, assesses, documents and communicates the potential impact of high-level risks.
5. Validates requirements at key points during the concept phase.
6. Assesses compliance with project objectives and requirements and seeks authorisation for the project.
7. Sets up project review process and associated schedule.
8. Gains approval either to progress to definition phase, refine concept phase or cancel project.

**Dashboard**

**Element Av. Competence Level:**  
Knowledge: [Progress Bar]  
Experience: [Progress Bar]

Currently answering in Average mode  
Pause Next

Scoring Mode Clear Scores

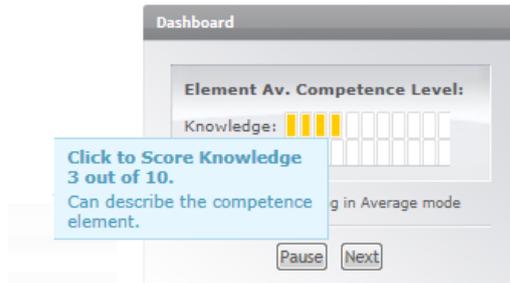
Current Domain:  
Technical Competence Domain  
Domain Progress: 0 %

Supporting Evidence:  
Enter your supporting evidence here for the scores given.

At the top of the screen is the competence title followed by a short definition of the competence. Below that are the indicators which support the assessment by showing how the competence may be applied to a project. There may be a different number of indicators for each competence.

By default, you are able to score the average competence level in the dashboard on the right hand side of the screen. For each competence you are required to score for Knowledge (K) and Experience (E) and moving your mouse over the slider-bars will show a pop-up description of what is expected at this score.

For example:

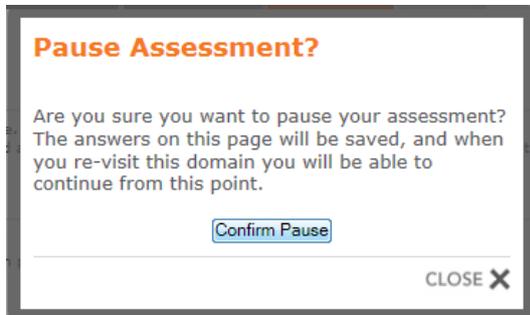


When you have selected an appropriate score for the individual you are assessing then click the  button to continue to the next.

## Pausing the assessment

If you wish to pause the assessment to clarify information or seek further evidence from the individual before you select the appropriate score, then click the **Pause** button.

The following pop-up message will be displayed:



Click the **Confirm Pause** button to return to the assessment home page where you can end the assessment. All your answers will be saved, and you can return to the assessment later.

## Switching scoring modes

COMPASS has the ability to switch scoring modes from the average scoring mode to an indicator level scoring mode.

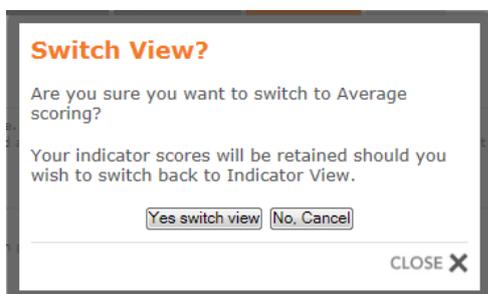
---

**NOTE: By default, the detailed scoring mode is selected initially for the user, and the average scoring mode is selected initially for the Line Manager (or appointed assessor), who may have a number of staff to assess.**

---

From the competence screen, click the  button:

The following message will appear:



Click the **Yes switch view** button to change the scoring mode or **No, Cancel** button to return to the existing scoring mode.

If you have selected to switch the view, then the following screen will be displayed:



## Clearing the scores for a competence

If you have completed the scores for a competence element and wish to clear the scores, then click the



button in the Dashboard area.

Compass (Demo) - Windows Internet Explorer  
https://compass.qa.com/uk/assess/cfAssessments/element.jsp?domainId=1&domainName=Technical Competence Domain

Compass (Demo) QA

Welcome Your Details Instructions 180 Review Questionnaire **Assessment** Results

**CONCEPT (TC01)**

**Definition**  
Concept is the first phase in the project life cycle. During this phase the need, opportunity or problem is confirmed, the overall feasibility of the project is considered and a preferred solution identified. The business case for the project will be produced in this phase.

**Indicators**

- Gathers, documents and gets agreement on project requirements with key stakeholders. K E
- Validates and/or develops a business case and project strategies, and place them under change control. K E
- Defines project objectives, appraises the project (including financial appraisal), carries out a feasibility study and establishes an outline project plan. K E
- Identifies, assesses, documents and communicates the potential impact of high-level risks. K E
- Validates requirements at key points during the concept phase. K E
- Assesses compliance with project objectives and requirements and seeks authorisation for the project. K E
- Sets up project review process and associated schedule. K E
- Gains approval either to progress to definition phase, refine concept phase or cancel project. K E

Pause Next

**Dashboard**

Element Av. Competence Level:  
Knowledge: [Progress Bar]  
Experiences: [Progress Bar]

Currently answering in Indicator mode

Pause Next

Scoring Mode: **Clear Scores**

**Current Domain:**  
Technical Competence Domain  
**Domain Progress:** 0 %

**Supporting Evidence:**  
Enter your supporting evidence here for the scores given.

The following message will appear:

**Clear Scores?**

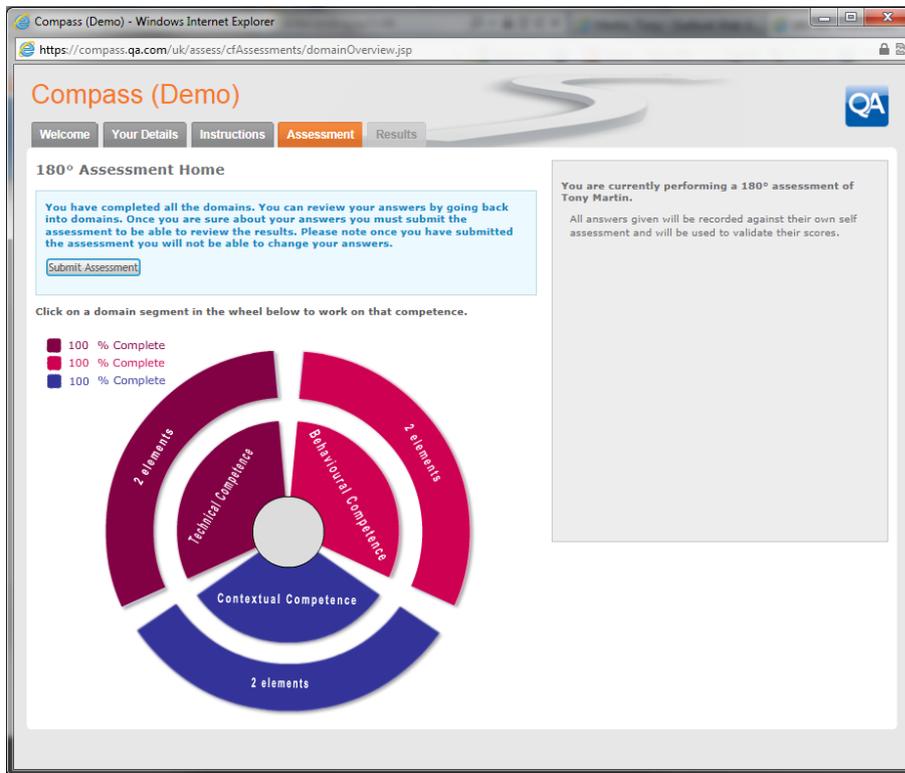
Are you sure you want to clear all scores for this competence element?

CLOSE X

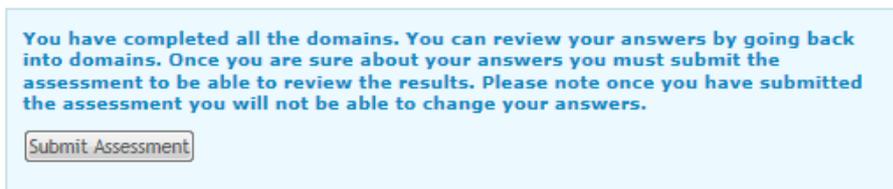
Click the  button to clear all the scores you have entered or the  button to return to the existing scores.

## Finishing the assessment

Once you have completed all the domains you will see an additional message at the top of the assessment home page.



The following message will be displayed:



If you are happy to continue, click the **Submit Assessment** button.

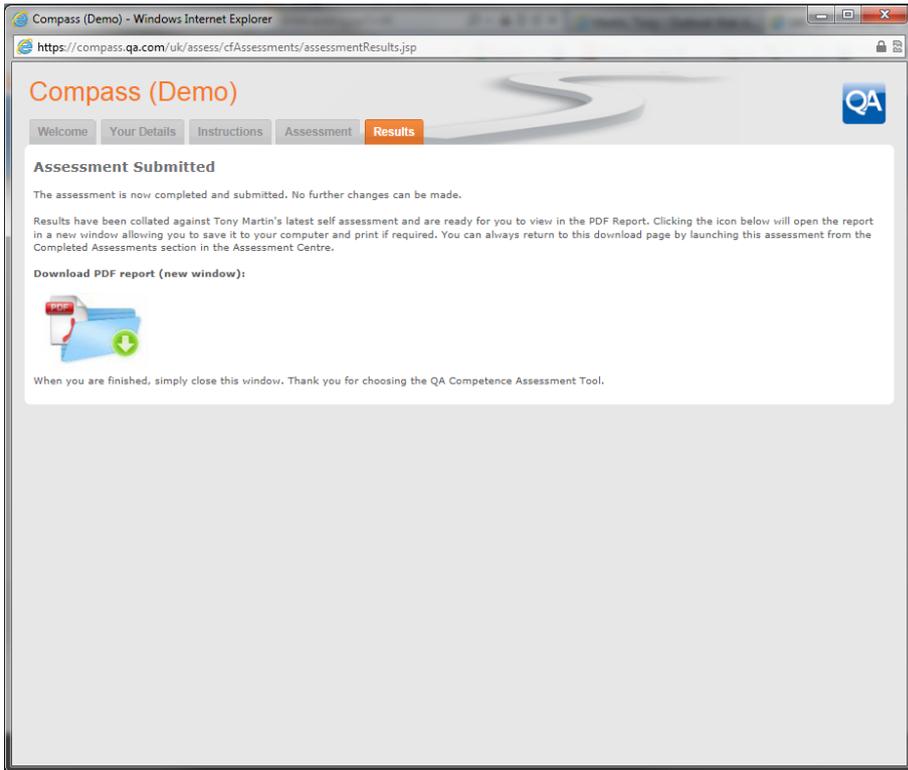
If you wish to review your scores you can click on the segment of the Wheel of competence to go directly to that domain.

---

**NOTE: Your scores are saved automatically and if you wish to close the assessment window and return to submit your scores later, then you will not lose the information you have already entered.**

---

Once you have submitted your assessment the following screen will be displayed:



If you wish to view or download your PDF report then click the  button.

Depending on your browser, a message similar to this may be displayed:



You can choose to save the file for reading later, or select Open to view it now.

The PDF report contains a comprehensive overview of the individual's assessment results aligned to recognised standards from the Association of Project Management (APM). If the individual has completed their self assessment then the report will contain their scores and your scores shown for comparison.

