



COMPASS Corporate User Guide

The Competence Management System
for Project Professionals.

Version 2.22

transforming performance
through learning

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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.

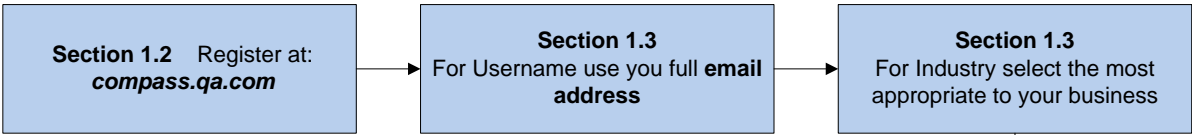
COMPASS is part of the QA Living Learning Framework which provides organisations with a structured programme for developing competent project professionals through progressive and immersive learning.

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.

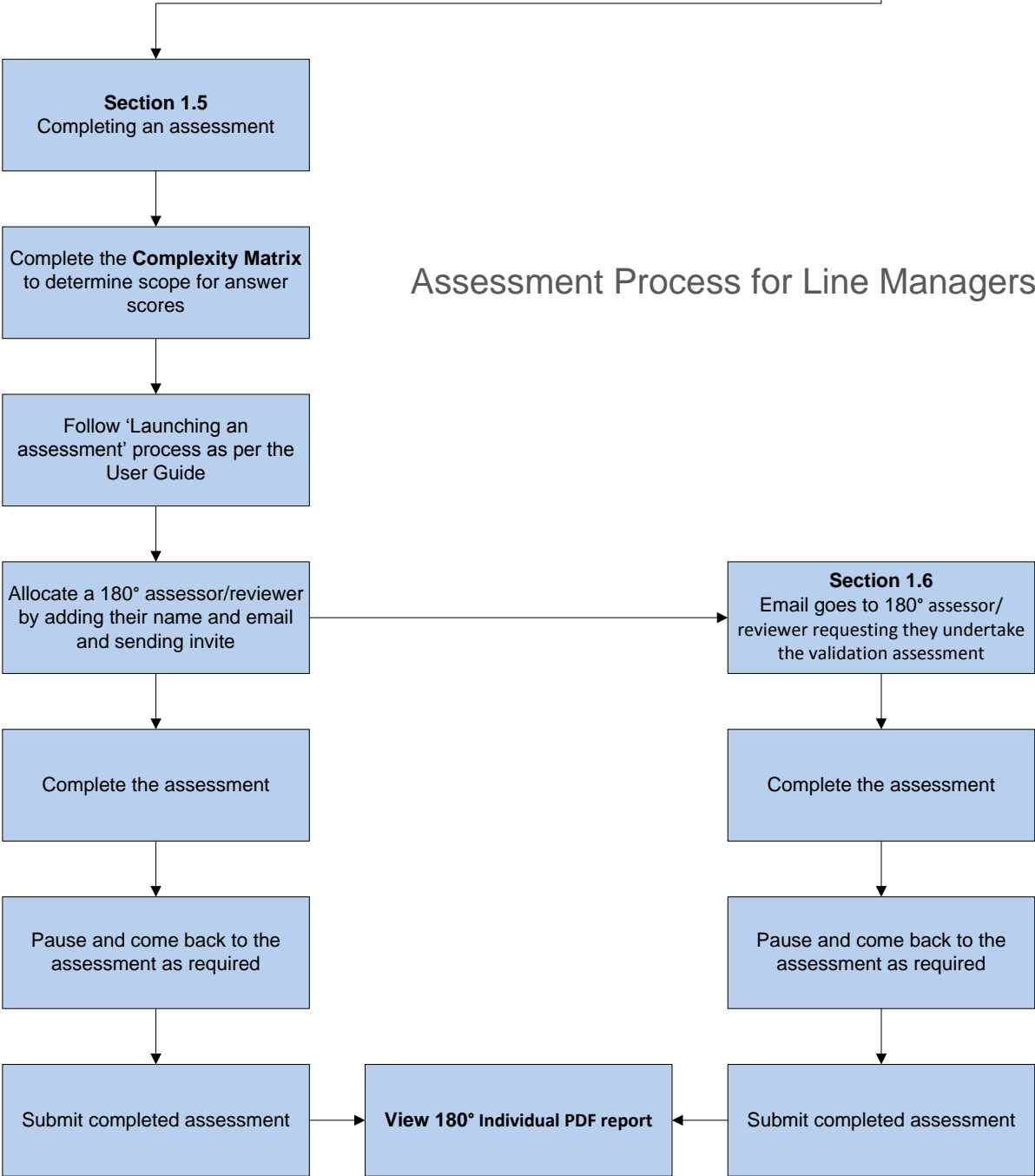
The following workflow diagram shows the end to end process at high level with reference to the relevant sections in this user guide. Use this for a basic process overview and graphical index.

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.

Registration Process



Assessment Process

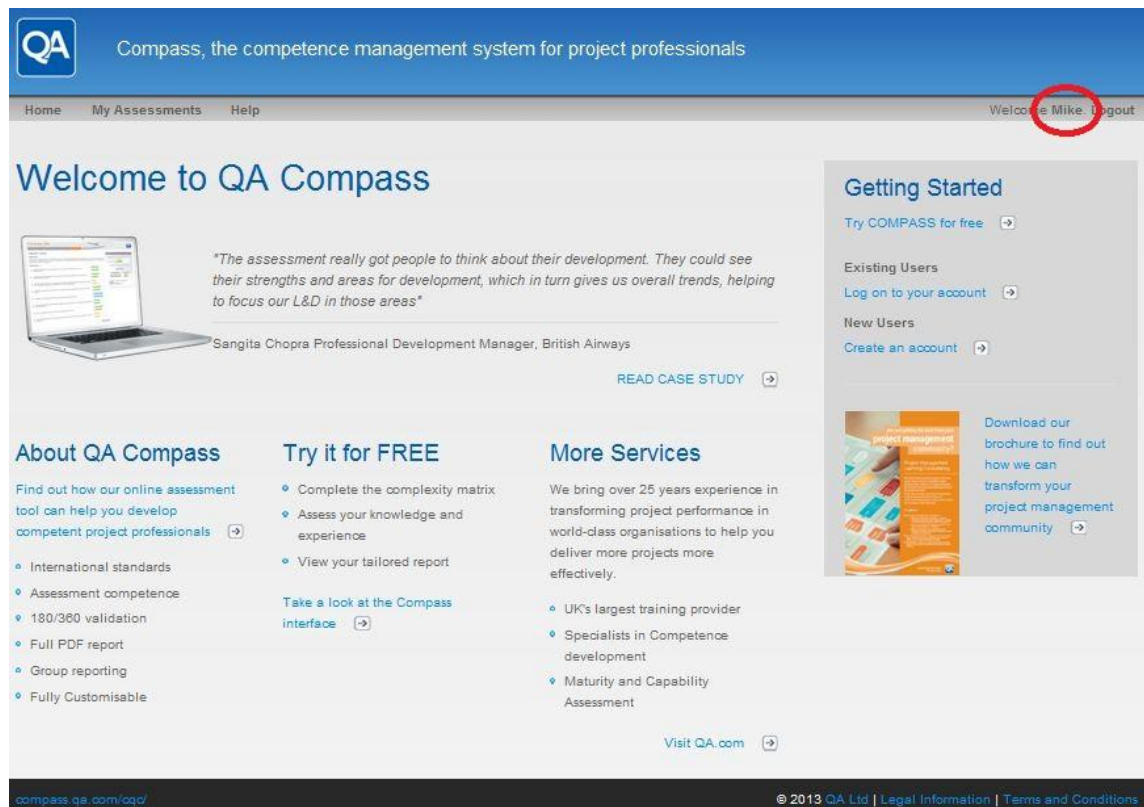


Assessment Process for Line Managers

1.2 How to access COMPASS

To access COMPASS, open your web browser and type: compass.qa.com 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 this is a navigation bar with links: Home, My Assessments, Help, Welcome Guest, Login, and Register. The main content area has the title 'Member Registration' and a 'Submit' button. Under the title, 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 then asks the user to enter their company password and email address, noting that the password is case sensitive. Below this is a 'Corporate Registration Security Check' section with input fields for 'Password:' and 'Email address:'. At the bottom of the page is a footer with the URL 'compass.qa.com/cqc/' and copyright information '© 2013 QA Ltd | Legal Information | Terms and Conditions'.

Enter your email address and your company corporate password.

You will then see the following page:

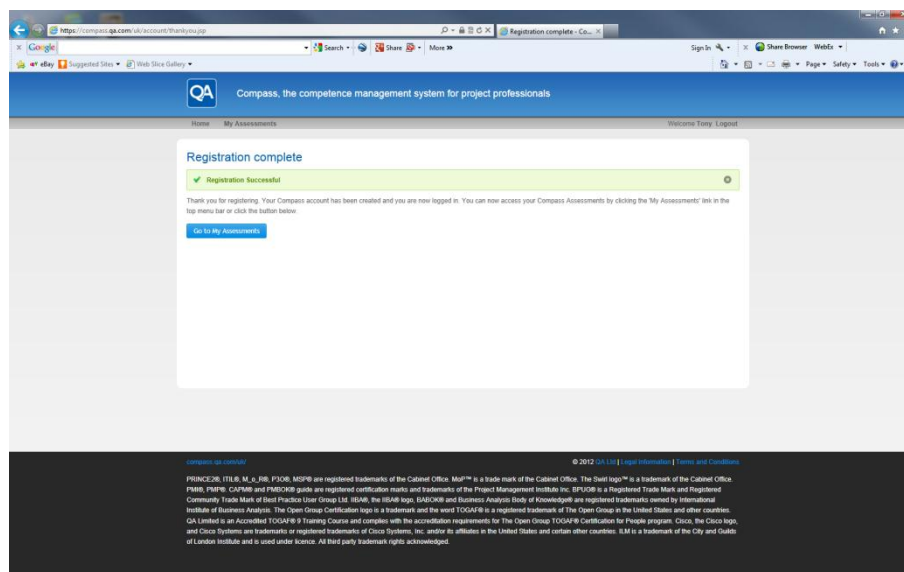
The screenshot shows the 'Corporate Registration' page. It has the same header and navigation bar as the previous page. The main content area has the title 'Corporate Registration' and a 'Submit' button. Below the title, it says 'To register for Compass simply complete the following details.' and notes that fields with an asterisk are required. The form is divided into two sections: 'Contact information' and 'Login information'. The 'Contact information' section includes input 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 input fields for 'Desired Username:', 'Password:', and 'Re-type Password:'. At the bottom of the page is a footer with the URL 'compass.qa.com/cqc/' and copyright information '© 2013 QA Ltd | Legal Information | Terms and Conditions'.

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.

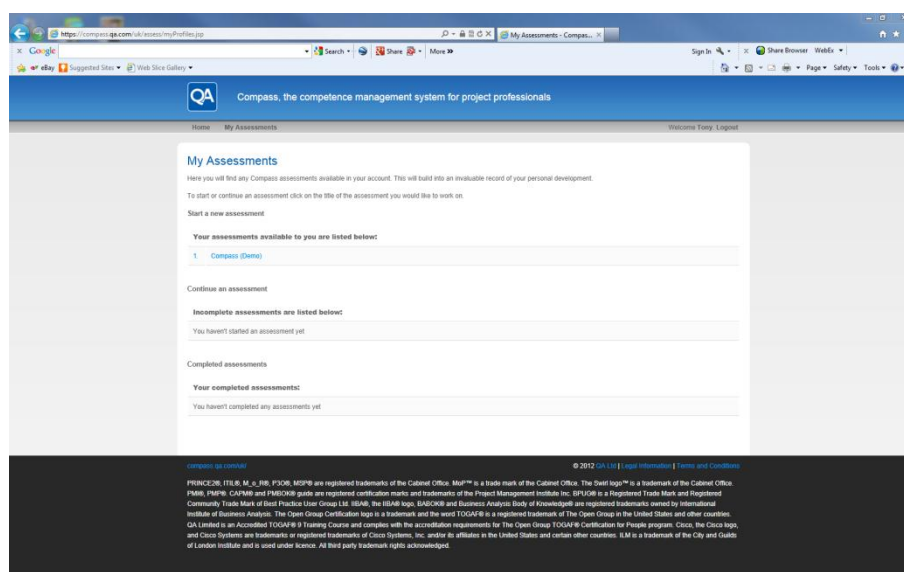
Once you have completed all the required fields, click the **Submit** button to create your account.

The following screen will be displayed:



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

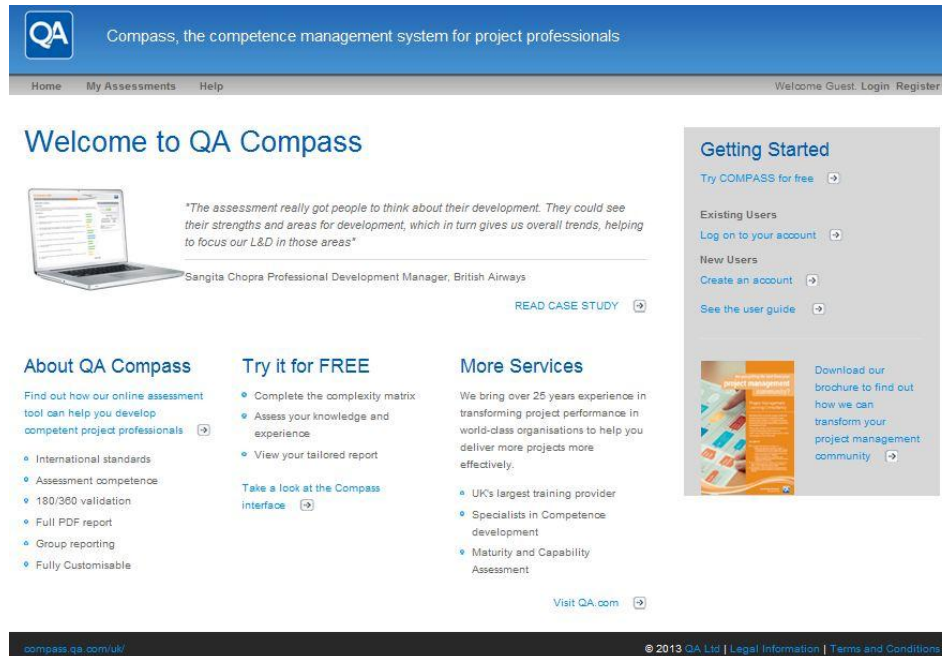
The following page will be displayed:



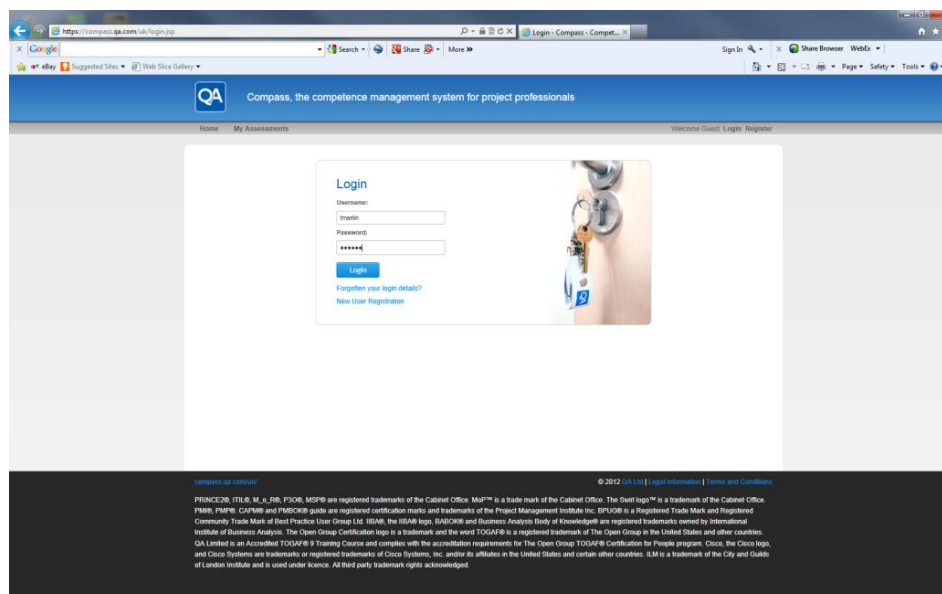
Go to Section **1.5 Completing an assessment** to get started.

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**.



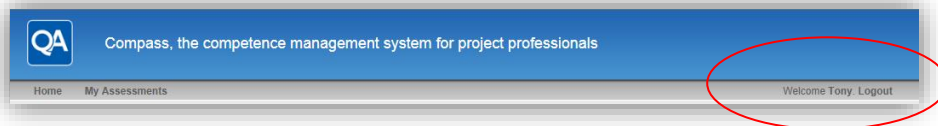
The following screen will be displayed:



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

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.

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.

Complexity Questionnaire
Before starting a Compass Assessment it is recommended that you complete the Project Complexity Questionnaire. This will allow you to record the complexity of projects that you typically manage, which allows the Compass Tool to set the correct level of scoring within the assessment, and hence increase the accuracy of the results.

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.

Complexity Questionnaire

Before starting a Compass Assessment it is recommended that you complete the Project Complexity Questionnaire. This will allow you to record the complexity of projects that you typically manage, which allows the Compass Tool to set the correct level of scoring within the assessment, and hence increase the accuracy of the results.

When answering the complexity questions, consider your overall project experience over the last 8 years. For a complete evaluation all criteria must be rated. Your responses will be saved and can be reviewed or updated at any point.

Question 1 of 10

	Significant complexity		Limited complexity	
	strongly agree	agree	disagree	strongly disagree
1. Objectives, Assessment of Results				
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](#)

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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.

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: Select one..

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. MIKE.KIBBLEWHITE_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:

Compass (Demo) - Windows Internet Explorer

https://compass.qa.com/uk/assess/cfAssessments/launch.jsp?allocId=21344&evaluationId=89

Compass (Demo)

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

Compass (Demo)

Welcome to Compass, the Competence Assessment tool that is based on the APM&L's competency framework. This is a Demonstration Version with a reduced number of competences for you to complete.

This online tool provides a step by step process to identify your competence level against each of the competences within the APM Body of Knowledge (APM BoK).

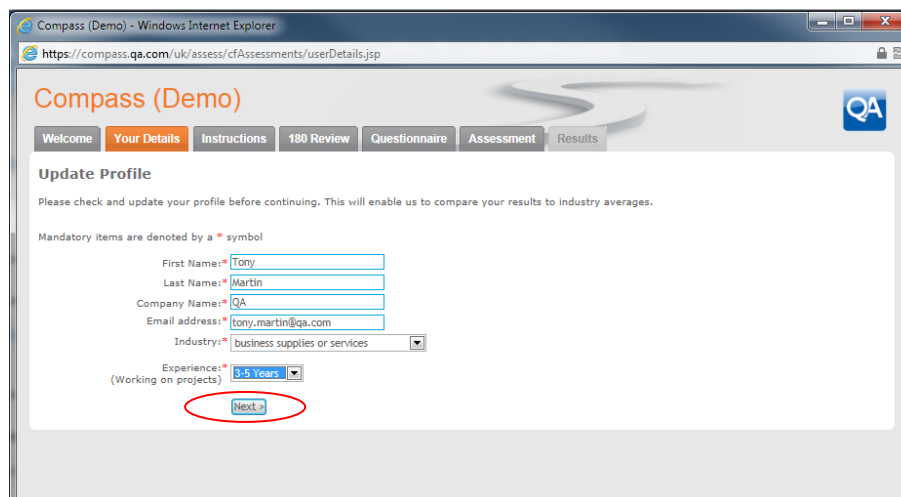
Click Continue below to proceed.

[Continue](#)

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

Once you have read the introductory text, click on the [Continue](#) button.

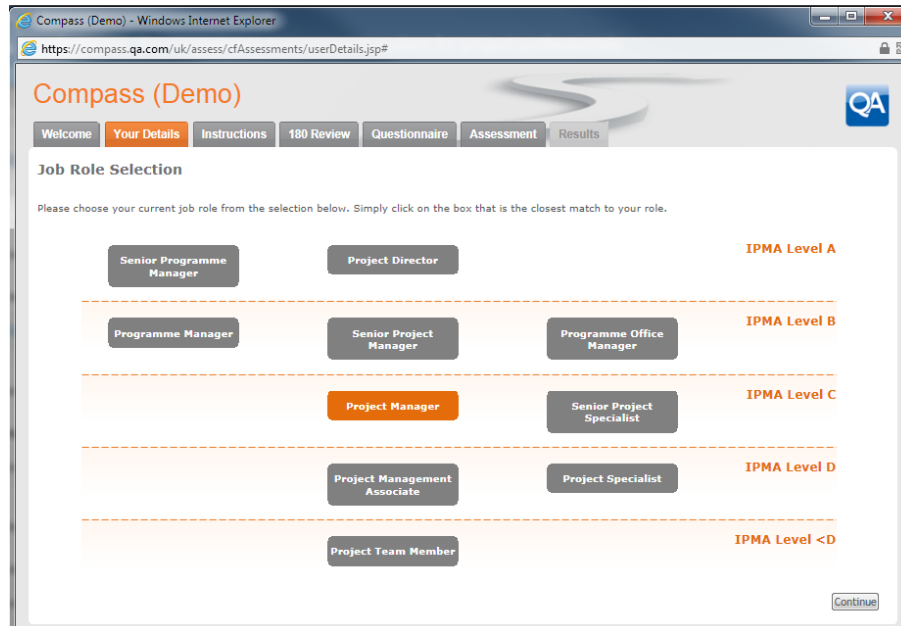
The following screen will be displayed:



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.

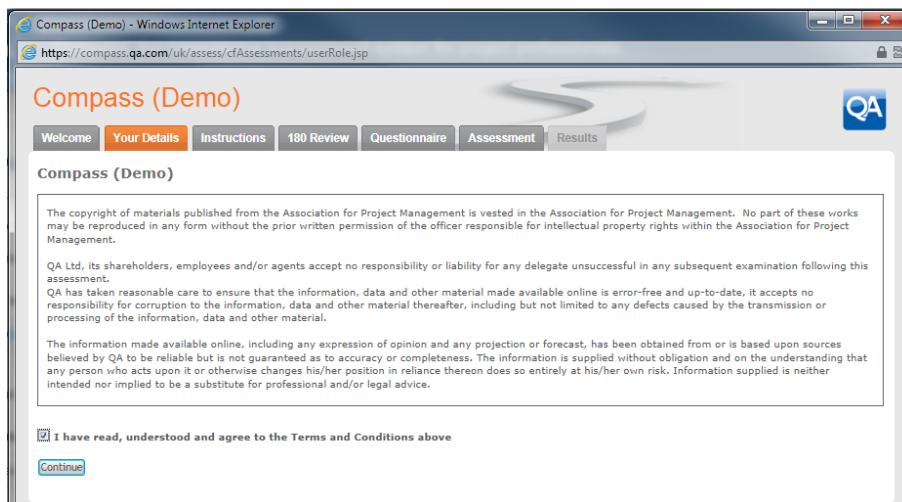
By placing your mouse over each role, you will see a pop-up displayed which gives a description of each role as shown below:

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.

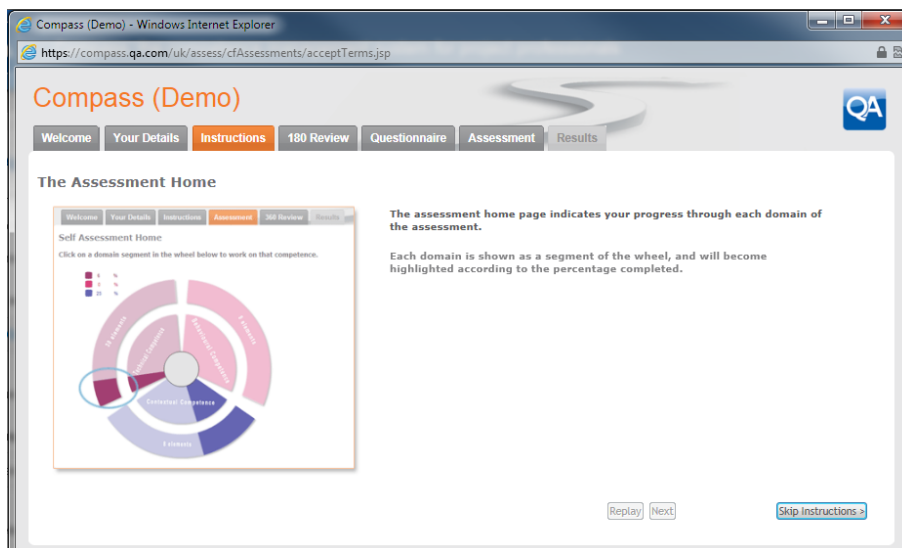
Once you have selected your current role by clicking on the job title to highlight it, click the **Continue** button.

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)

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

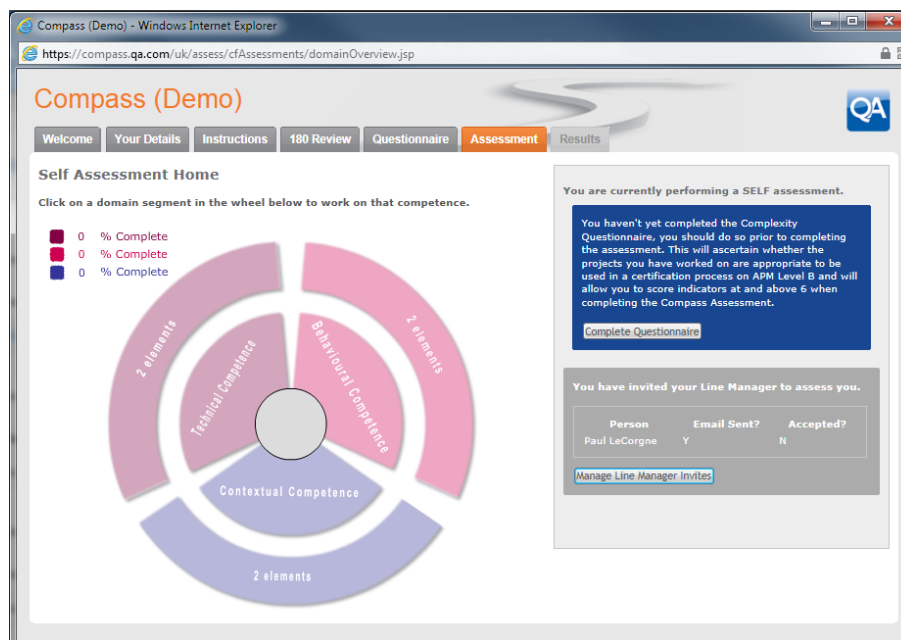
Name: * Paul LeCorgne Email: * paullecorgne@qa.com [Send Invite](#)

To invite your Line Manager (or appointed assessor) to complete a 180 Review, simply enter their name and email address and click the [Send Invite](#) 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:

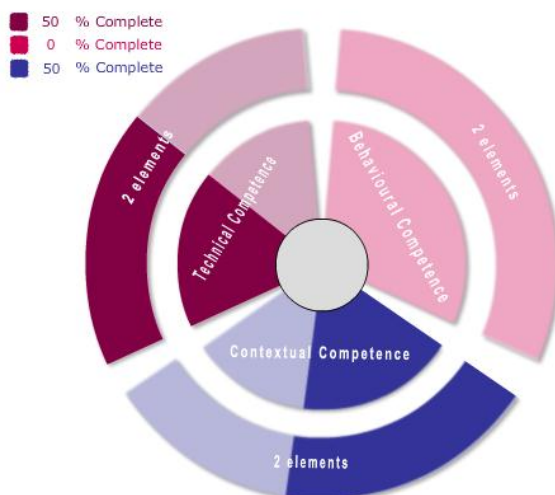
Assessment Home Page



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.

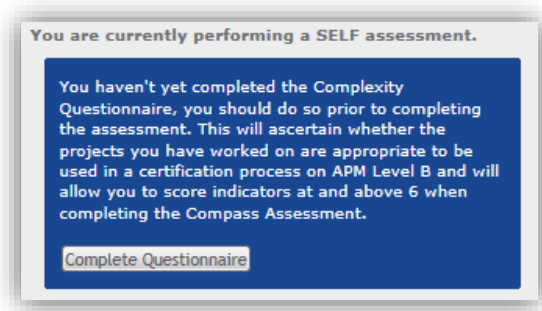
Complexity Questionnaire (from within assessment)

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.

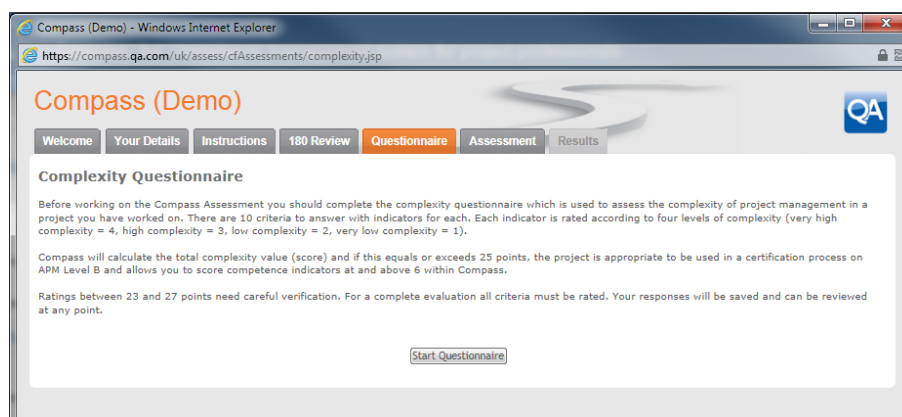
NOTE: If you have only worked on simple (or non-complex) projects, then you will only be able to score yourself on a scale of 1-5 for each competence.

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	
1. Objectives, Assessment of Results	complexity very high	complexity high	complexity low	complexity very low
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.

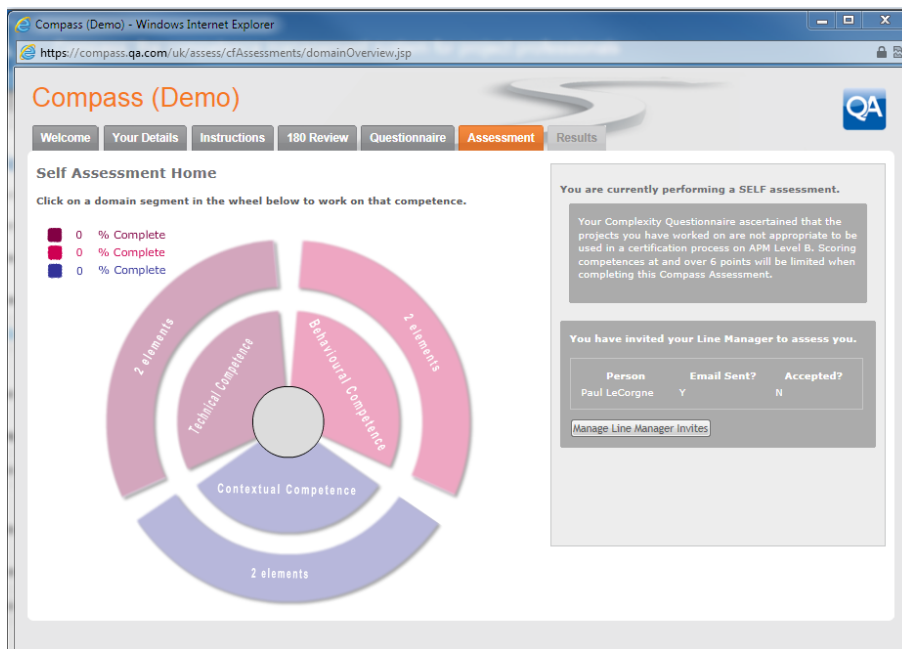
[Continue to the Assessment..](#)

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.

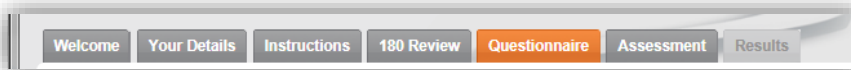
You will be returned to the assessment home page.



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

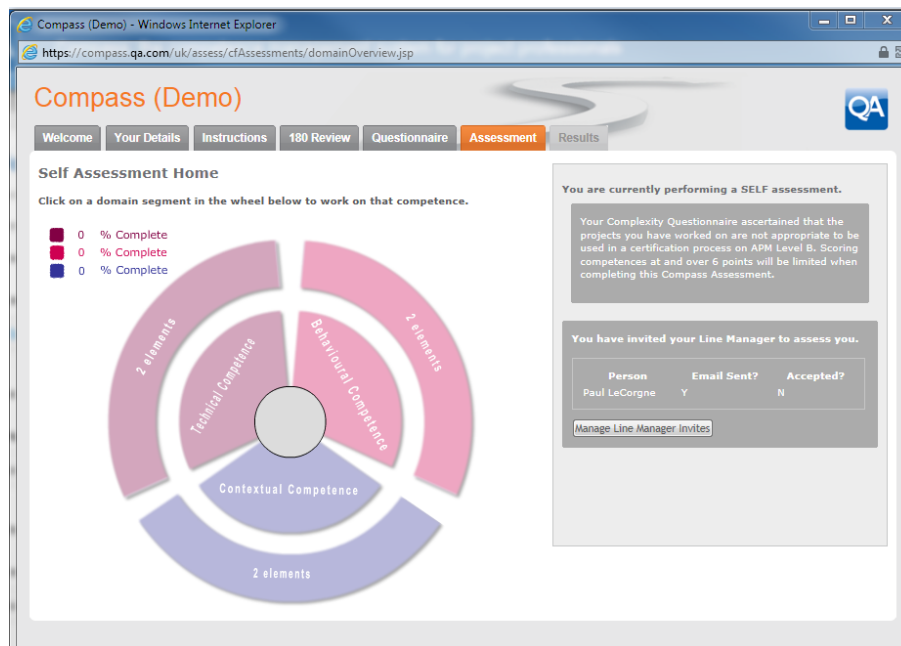
Your Complexity Questionnaire ascertained that the projects you have worked on are not appropriate to be used in a certification process on APM Level B. Scoring competences at and over 6 points will be limited when completing this Compass Assessment.

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:

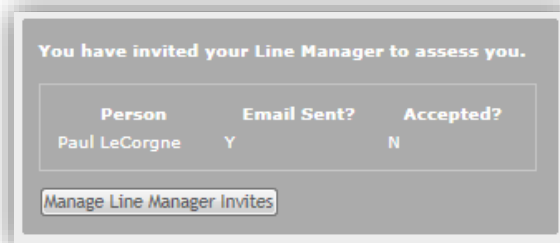


Revoking a Line Manager invitation.

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.

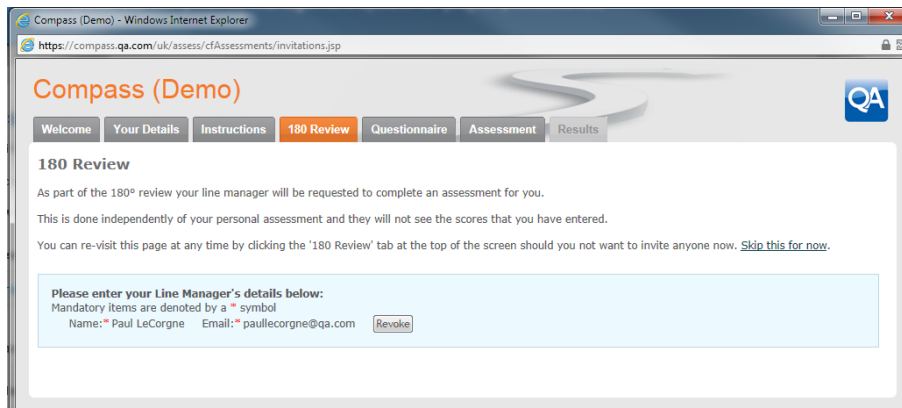


In this example, a Line Manager has been sent an invitation email, but has yet to accept and complete the assessment as shown in the dashboard area.



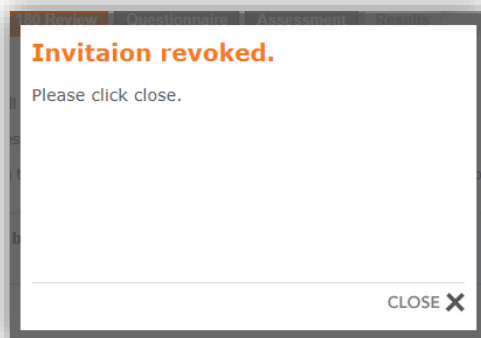
If you wish to amend or change the Line Manager (or appointed assessor) invitation, then click on the **Manage Line Manager Invites** button.

The following screen will be displayed:

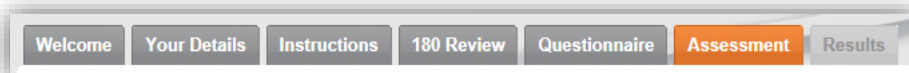


If you wish to edit or change the invitation, then it must be cancelled and then a new invitation sent. To cancel the invitation click on the **Revoke** button.

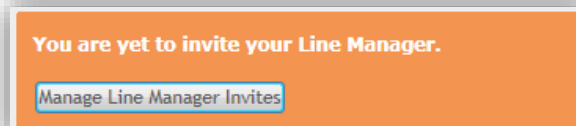
The following message will be displayed:



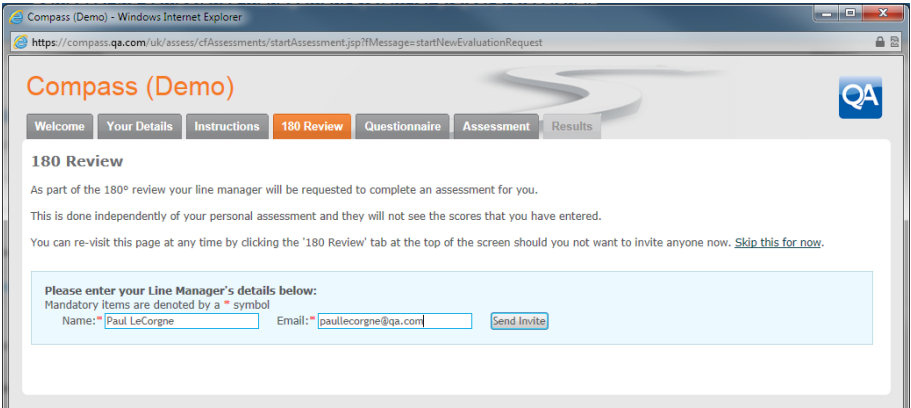
You will then need to click the Assessment tab at the top of the screen to return to the Assessment Home Page.



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):



Competence assessment questions

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

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

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

0 % Complete
0 % Complete
0 % Complete

2 elements
Technical Competence
Behavioural Competence
2 elements
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 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)

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

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

Pause Next

Dashboard

Element Av. Competence Level:

Knowledge:

Experience:

Currently answering in Indicator mode

Pause Next

Scoring Mode **Clear Scores**

Current Domain:
Technical Competence Domain

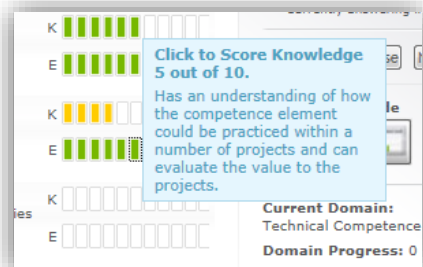
Domain Progress: 0 %

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

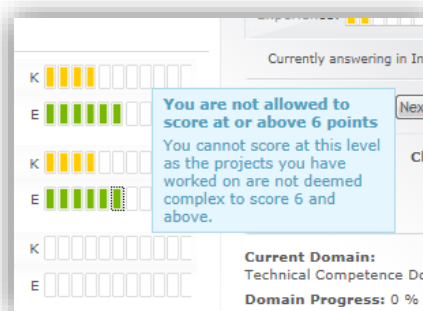
At the top of the screen is the competence title followed by a short definition of the competence. Below that are the indicators which support the assessment by showing how the competence may be applied to a project. There may be a different number of indicators for each competence.

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.



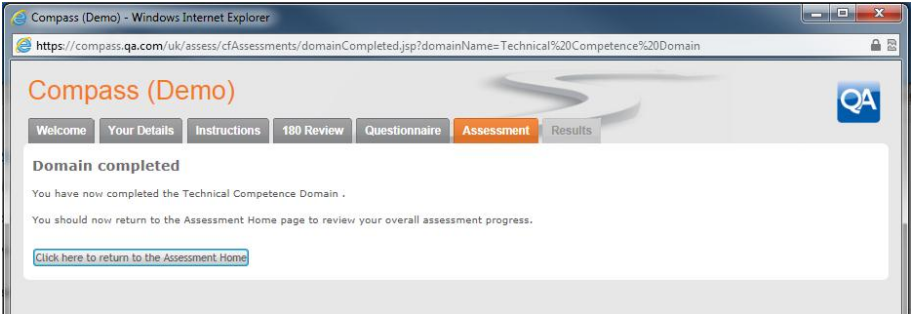
The following screenshot shows that each indicator has had a score selected. You will note that the dashboard on the right hand side is now showing the average of the scores.

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.'

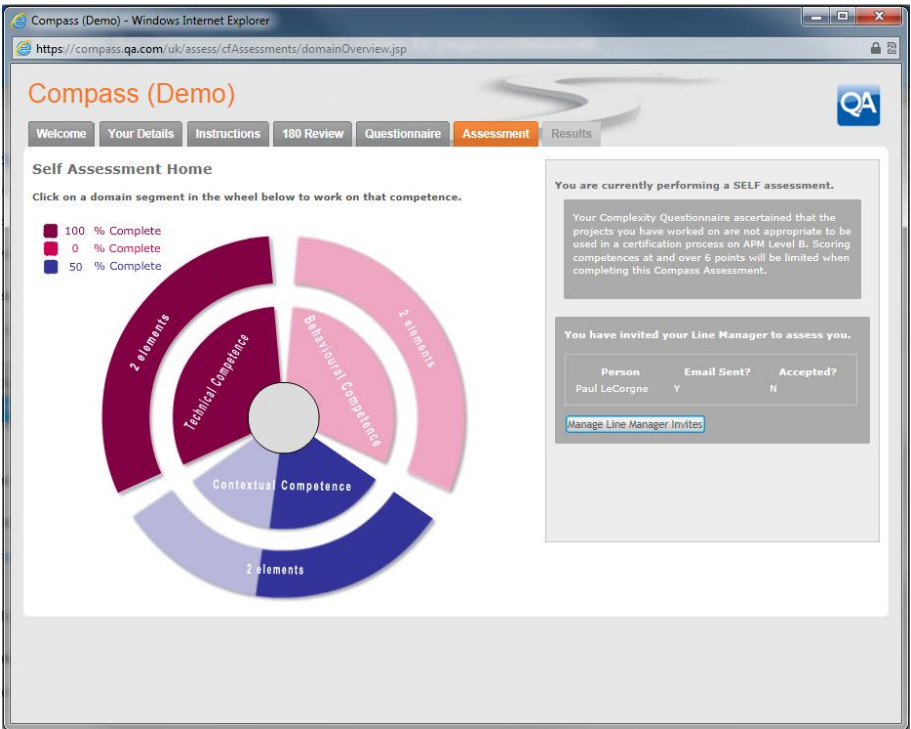
If you have finished entering all the scores, you can move onto the next Competence by clicking the **Next** button.

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.

The screenshot shows the 'Compass (Demo)' assessment interface in a Windows Internet Explorer browser. The URL is <https://compass.qa.com/uk/assess/cfAssessments/element.jsp?domainId=1&domainName=Technical Competence Domain>. The interface has a navigation bar with tabs: Welcome, Your Details, Instructions, 180 Review, Questionnaire, **Assessment**, and Results. The main content area is titled 'CONCEPT (TC01)' and includes a 'Definition' section, 'Indicators' (a list of 8 tasks), and a 'Dashboard' sidebar. The 'Dashboard' sidebar contains 'Element Av. Competence Level' (Knowledge and Experience bars), 'Currently answering in Indicator mode' (with 'Pause' and 'Next' buttons, where 'Pause' is circled in red), 'Scoring Mode' and 'Clear Scores' buttons, 'Current Domain: Technical Competence Domain', 'Domain Progress: 0 %', and 'Supporting Evidence' text area. At the bottom of the main content area, there are 'Pause' and 'Next' buttons.

A message will be displayed:

The screenshot shows a 'Pause Assessment?' dialog box. It contains the text: 'Are you sure you want to pause your assessment? The answers on this page will be saved, and when you re-visit this domain you will be able to continue from this point.' Below the text is a 'Confirm Pause' button and a 'CLOSE X' button.

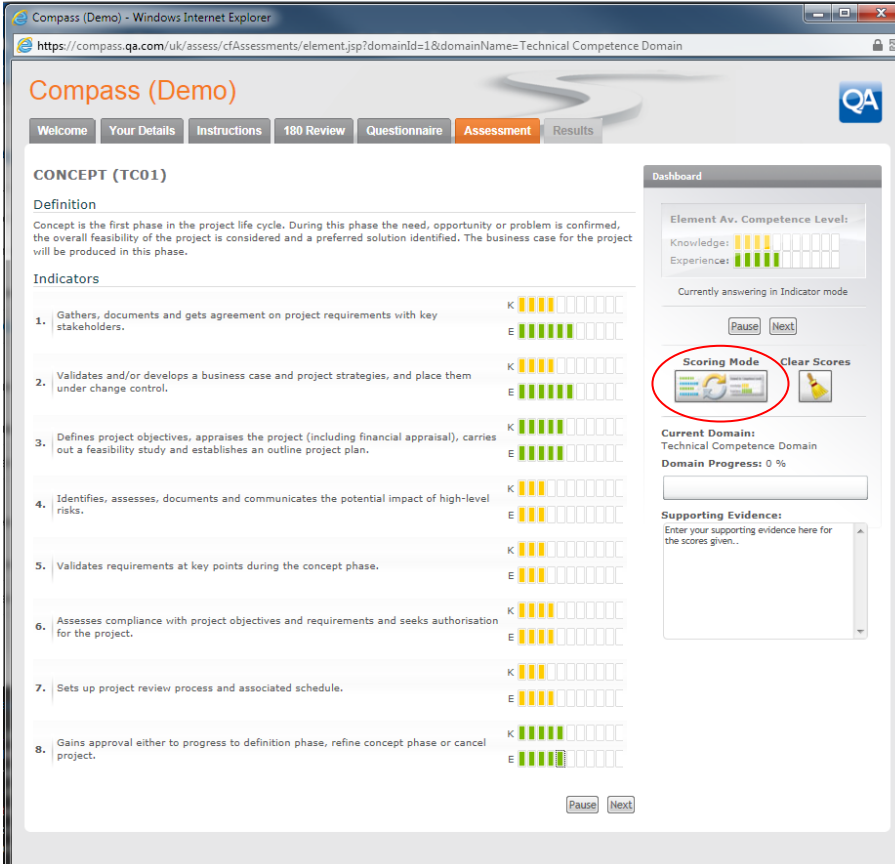
Click the **Confirm Pause** button to stop the assessment and save your results so far, or click the close button to continue the assessment.

Switching scoring modes

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

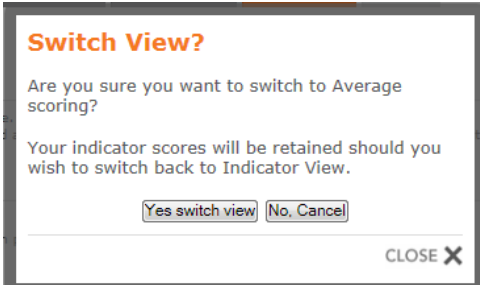
NOTE: By default, the detailed scoring mode is selected initially for the user, and the average scoring mode is selected initially for the Line Manager (or appointed assessor), who may have a number of staff to assess.

From the competence screen, click the  button:



The screenshot shows the Compass (Demo) web application in a Windows Internet Explorer browser. The URL is <https://compass.qa.com/uk/assess/cfAssessments/element.jsp?domainId=1&domainName=Technical Competence Domain>. The page has a navigation bar with tabs: Welcome, Your Details, Instructions, 180 Review, Questionnaire, Assessment (selected), and Results. The main content area is titled 'CONCEPT (TC01)' and includes a 'Definition' section and a list of 'Indicators' (8 items). Each indicator has a 'K' (Knowledge) and 'E' (Experience) column with progress bars. On the right, a 'Dashboard' panel shows 'Element Av. Competence Level' for Knowledge and Experience, 'Currently answering in Indicator mode', and buttons for 'Pause', 'Next', 'Scoring Mode' (circled in red), and 'Clear Scores'. Below the dashboard, it shows 'Current Domain: Technical Competence Domain' and 'Domain Progress: 0 %'. At the bottom of the dashboard is a 'Supporting Evidence' text area.

The following message will appear:



The dialog box has a title 'Switch View?' in orange. The text inside reads: 'Are you sure you want to switch to Average scoring?' followed by 'Your indicator scores will be retained should you wish to switch back to Indicator View.' At the bottom, there are two buttons: 'Yes switch view' and 'No, Cancel'. A 'CLOSE X' button is in the bottom right corner.

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:

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

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..

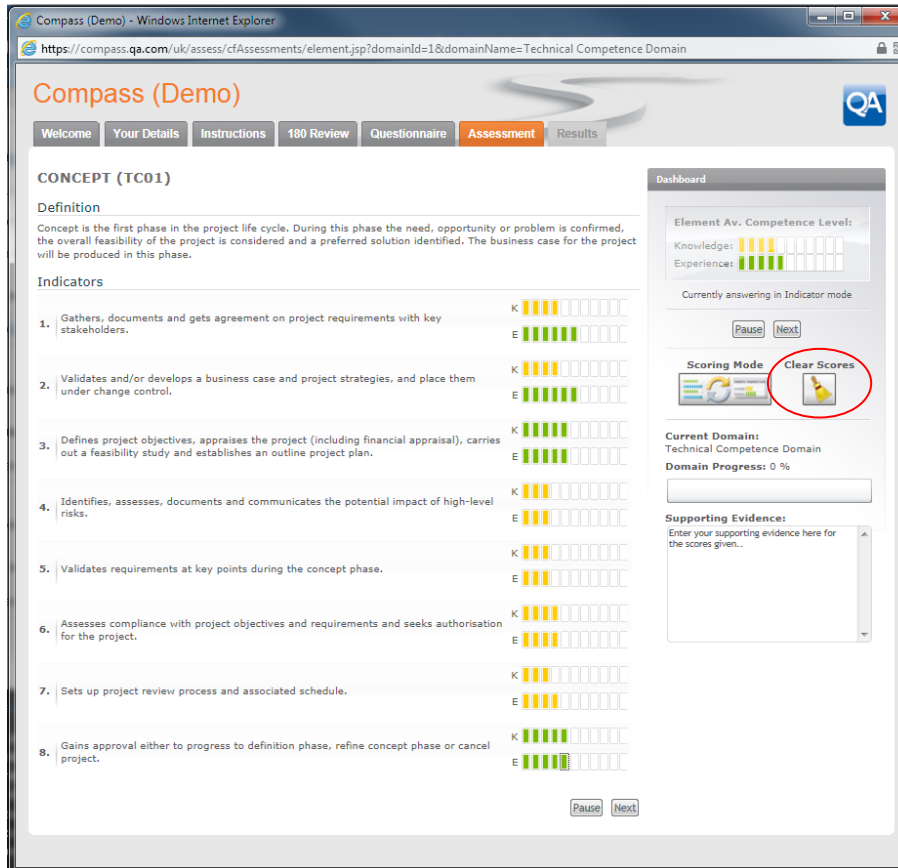
Pause Next

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.



Compass (Demo) - Windows Internet Explorer

https://compass.qa.com/uk/assess/cfAssessments/element.jsp?domainId=1&domainName=Technical Competence Domain

Compass (Demo)

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

Indicator	K	E
1. Gathers, documents and gets agreement on project requirements with key stakeholders.	100%	100%
2. Validates and/or develops a business case and project strategies, and place them under change control.	100%	100%
3. Defines project objectives, appraises the project (including financial appraisal), carries out a feasibility study and establishes an outline project plan.	100%	100%
4. Identifies, assesses, documents and communicates the potential impact of high-level risks.	100%	100%
5. Validates requirements at key points during the concept phase.	100%	100%
6. Assesses compliance with project objectives and requirements and seeks authorisation for the project.	100%	100%
7. Sets up project review process and associated schedule.	100%	100%
8. Gains approval either to progress to definition phase, refine concept phase or cancel project.	100%	100%

Dashboard

Element Av. Competence Level:

Knowledge: 100%

Experience: 100%

Currently answering in Indicator mode

Pause Next

Scoring Mode

Clear Scores

Current Domain:

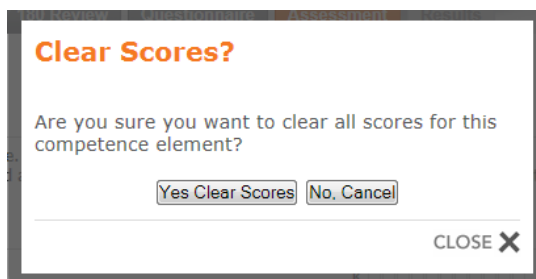
Technical Competence Domain

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?

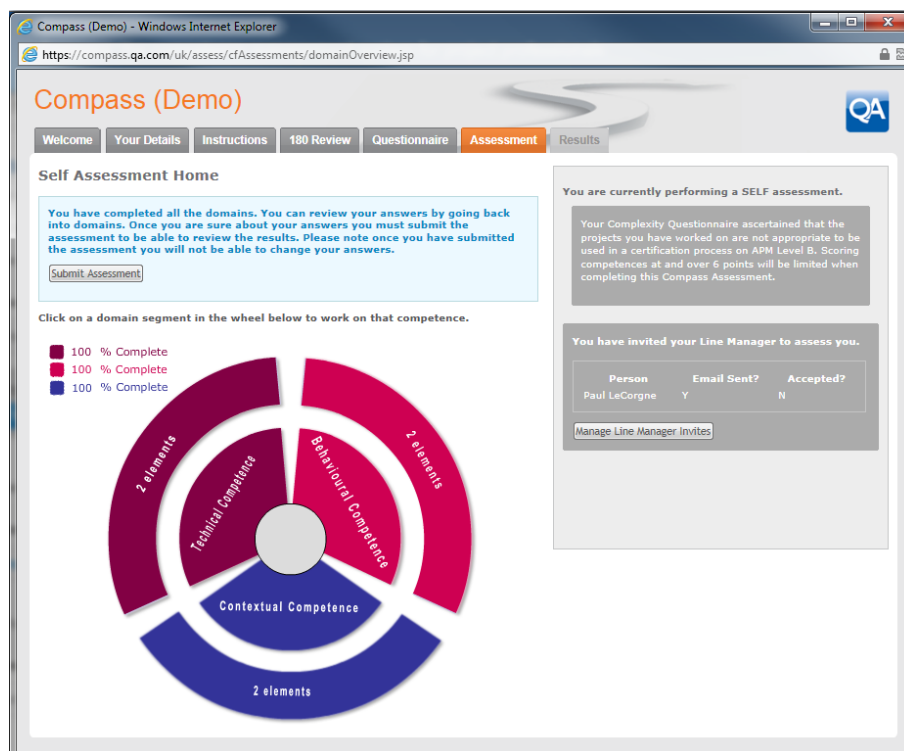
Yes Clear Scores **No, Cancel**

CLOSE X

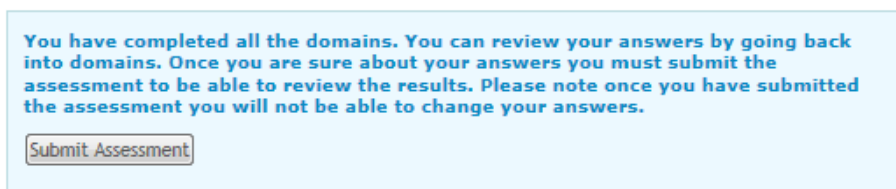
Click the **Yes Clear Scores** button to clear all the scores you have entered or the **No, Cancel** button to return to the existing scores.

Finishing the assessment

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



The following message will be displayed:

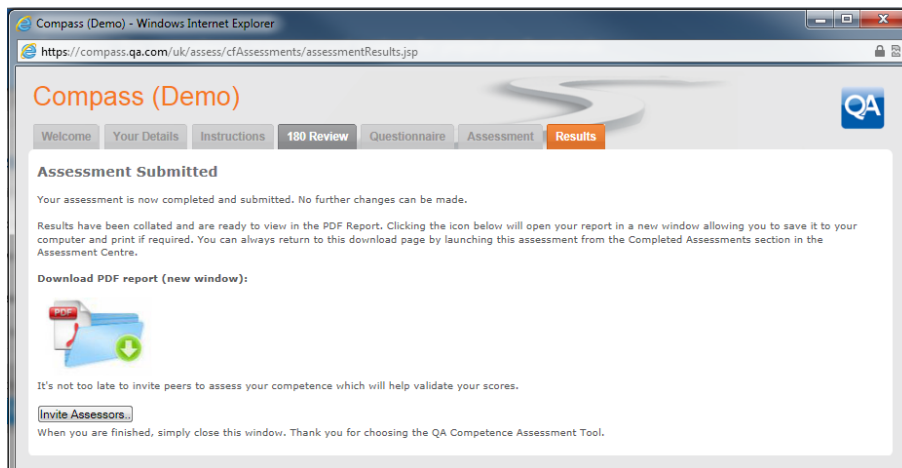


If you are happy to continue, click the [Submit Assessment](#) button.

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.

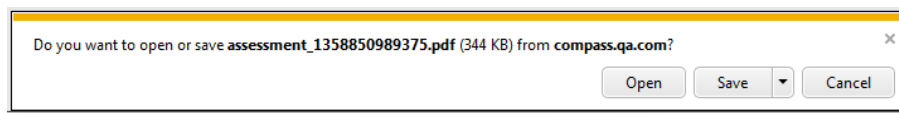
Once you have submitted your assessment the following screen will be displayed:



If you 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.

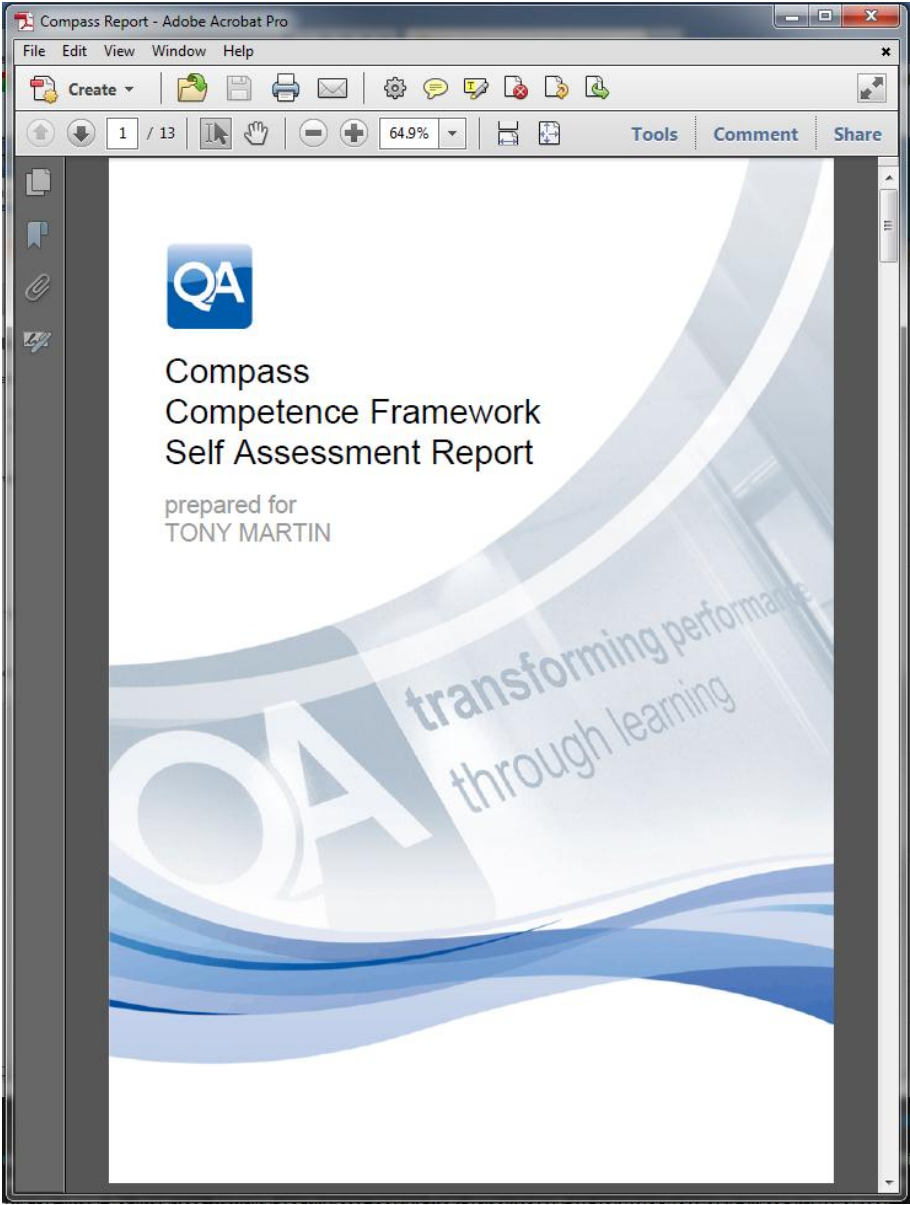
Depending on your browser, a message similar to this may be displayed:



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.

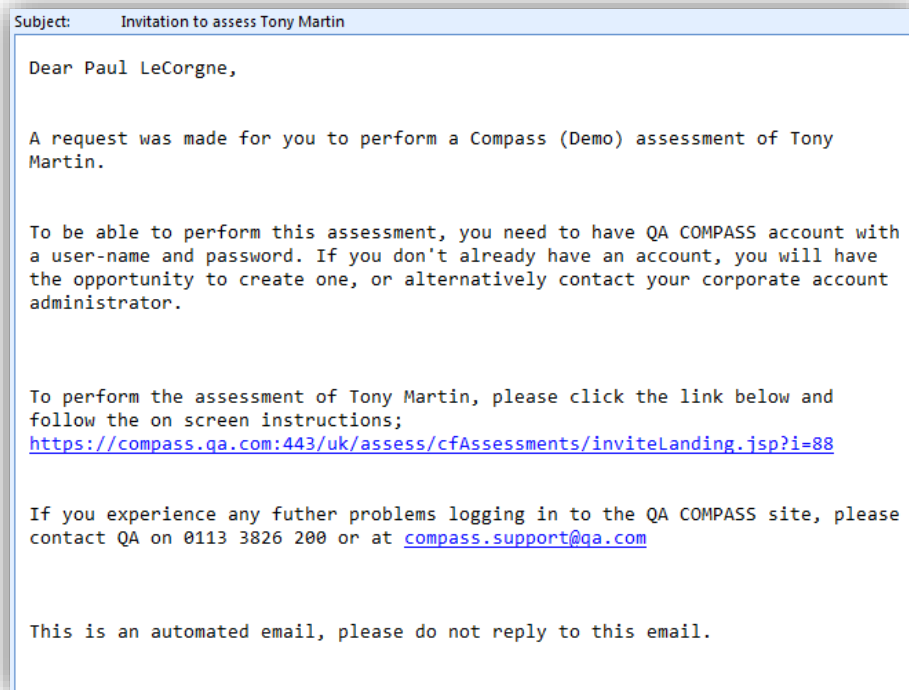
When they have completed their assessment of you, you will be able to download an updated report showing their scores against your own.



1.6 COMPASS for Line Managers

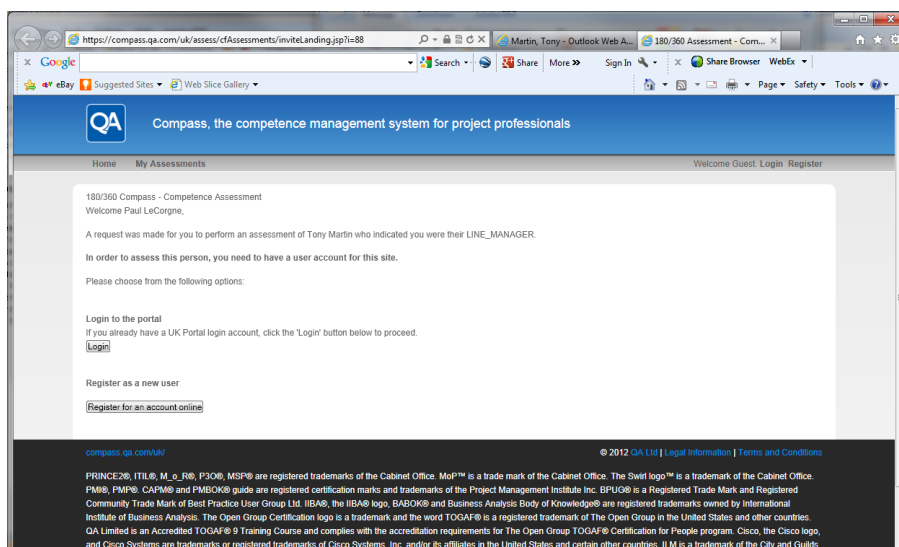
If you have been invited to assess a member of staff or a colleague then you will have been sent an email containing a link to COMPASS.

Invitation email



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

The following screen will be displayed:

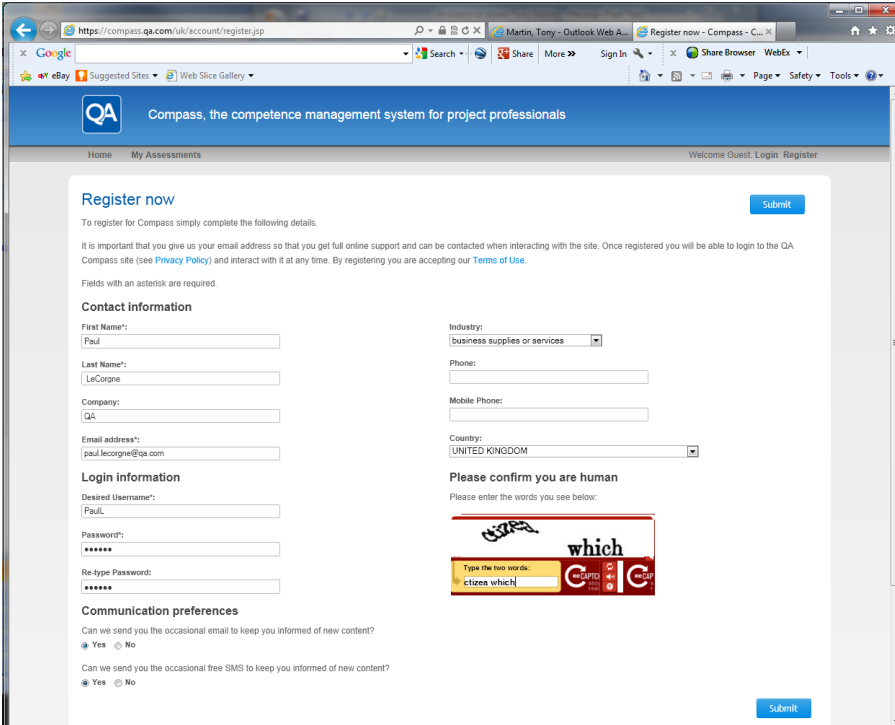


If you have not used COMPASS before then you will be required to register an account by clicking the **Register for an account online** button.

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:

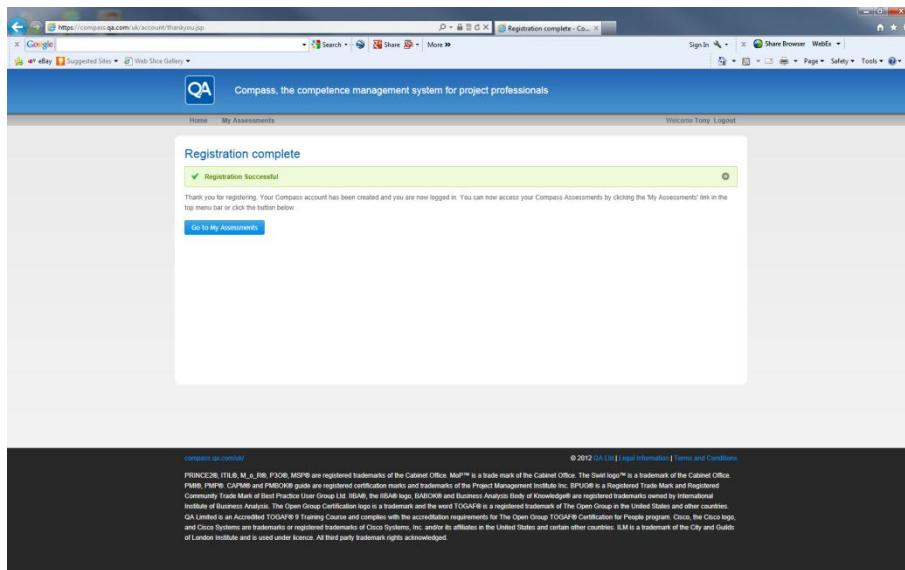
A screenshot of a web browser displaying the registration page for COMPASS. The browser's address bar shows 'https://compass.qa.com/uk/account/register.jsp'. The page has a blue header with the QA logo and the text 'Compass, the competence management system for project professionals'. Below the header, there are links for 'Home', 'My Assessments', 'Welcome Guest', 'Login', and 'Register'. The main content area is titled 'Register now' and includes a 'Submit' button. The registration form consists of several sections: 'Contact information' with fields for First Name (Paul), Last Name (LeCorgne), Company (QA), Email address (paul.lecorgne@qa.com), Industry (Business supplies or services), Phone, Mobile Phone, and Country (UNITED KINGDOM); 'Login information' with fields for Desired Username (Paul), Password, and Re-type Password; and 'Communication preferences' with checkboxes for receiving emails and SMS. A CAPTCHA image is also present, showing the word 'which' and the words 'ices which' and 'e'.

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.

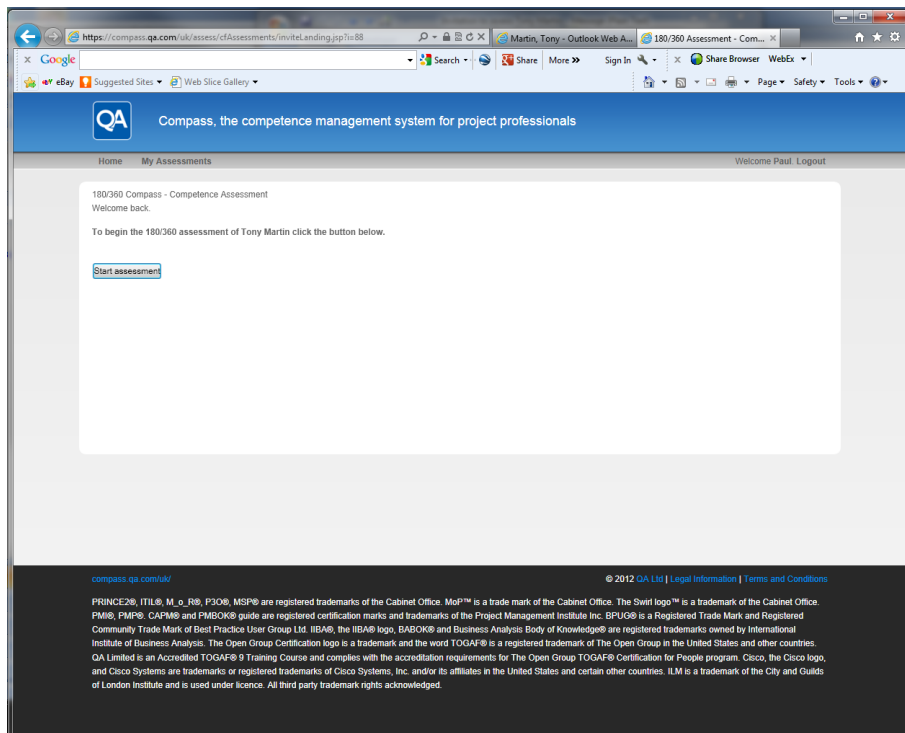
Once you have completed all the required fields, click the **Submit** button to create your account.

The following screen will be displayed:



Existing users

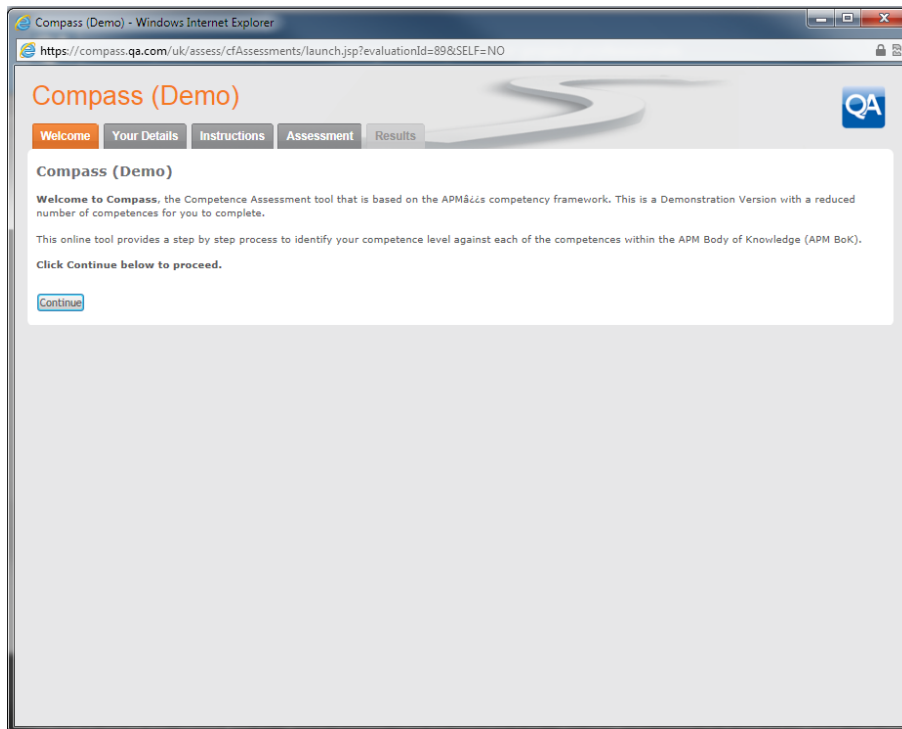
If you have previously registered an account on COMPASS, then clicking the link in the invitation email will take you to the page shown below:



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

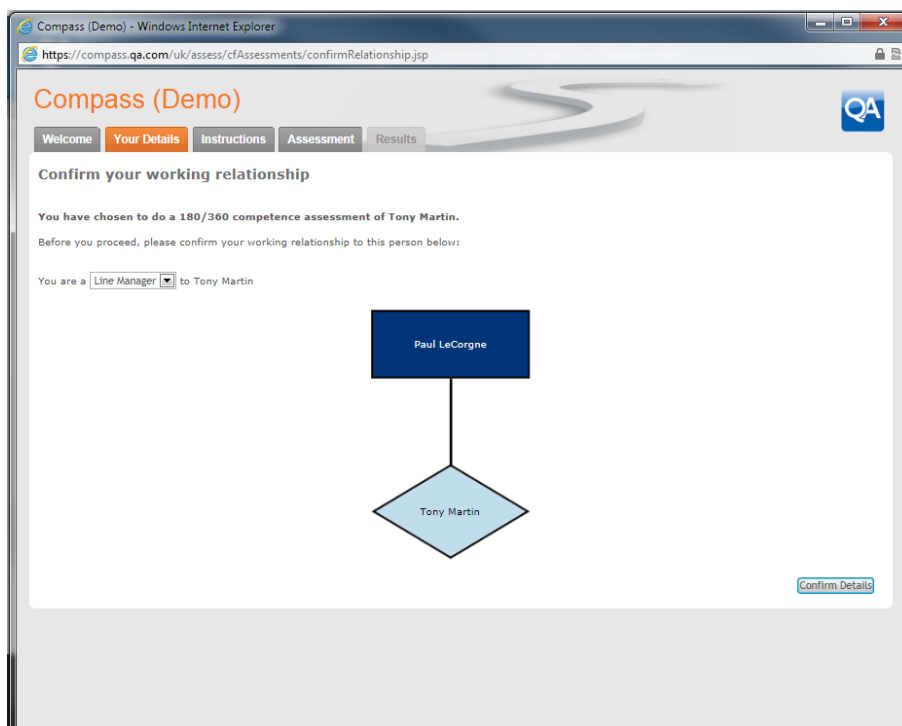
Starting the assessment

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:

The screenshot shows a web browser window titled "Compass (Demo) - Windows Internet Explorer". The address bar displays "https://compass.qa.com/uk/assess/cfAssessments/acceptTerms.jsp". The page header includes the "Compass (Demo)" logo and a navigation menu with tabs: "Welcome", "Your Details", "Instructions", "Assessment", and "Results". The main content area is titled "Compass (Demo)" and contains a text box with the following text:

The copyright of materials published from the Association for Project Management is vested in the Association for Project Management. No part of these works may be reproduced in any form without the prior written permission of the officer responsible for intellectual property rights within the Association for Project Management.

QA Ltd, its shareholders, employees and/or agents accept no responsibility or liability for any delegate unsuccessful in any subsequent examination following this assessment.

QA has taken reasonable care to ensure that the information, data and other material made available online is error-free and up-to-date, it accepts no responsibility for corruption to the information, data and other material thereafter, including but not limited to any defects caused by the transmission or processing of the information, data and other material.

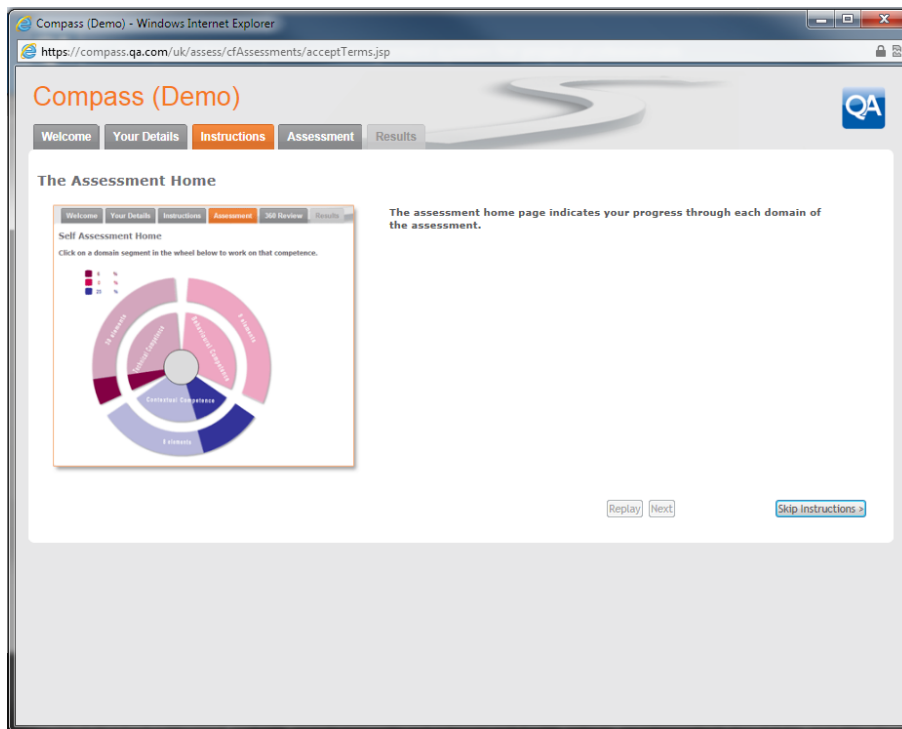
The information made available online, including any expression of opinion and any projection or forecast, has been obtained from or is based upon sources believed by QA to be reliable but is not guaranteed as to accuracy or completeness. The information is supplied without obligation and on the understanding that any person who acts upon it or otherwise changes his/her position in reliance thereon does so entirely at his/her own risk. Information supplied is neither intended nor implied to be a substitute for professional and/or legal advice.

Below the text box, there is a checkbox labeled "I have read, understood and agree to the Terms and Conditions above" which is checked. Below the checkbox is a "Continue" button.

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

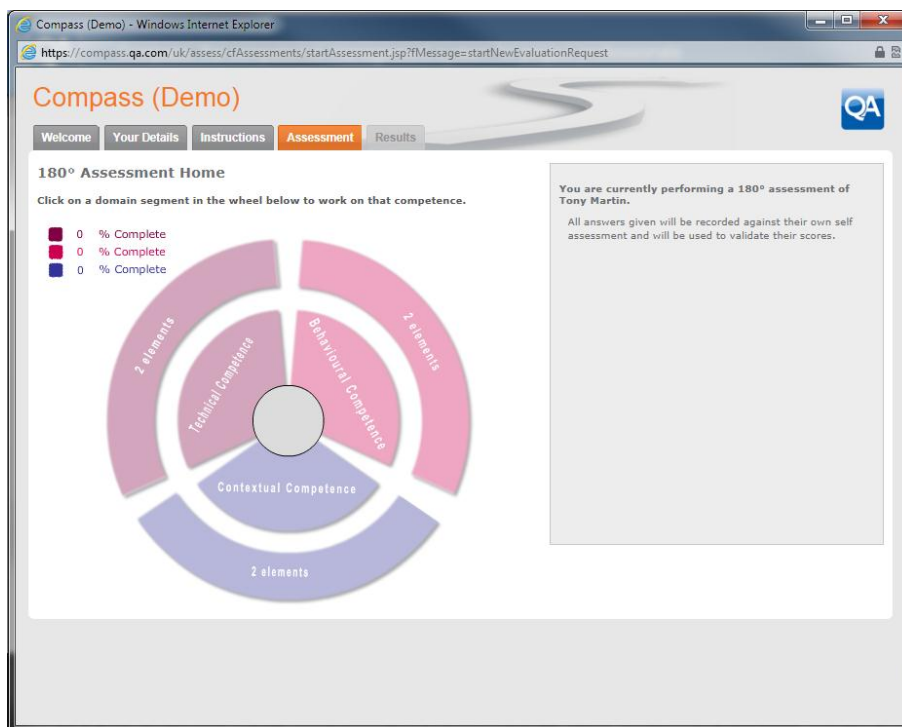
Click the Continue button.

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.

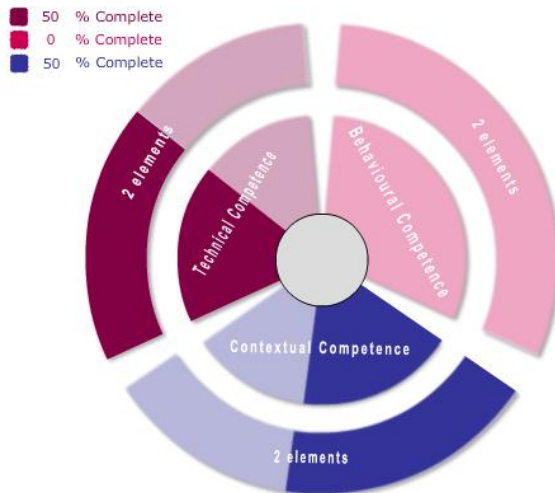
You will be presented with the assessment home page as shown:



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)

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:
Experience:

Currently answering in Average mode
Pause Next

Scoring Mode **Clear Scores**

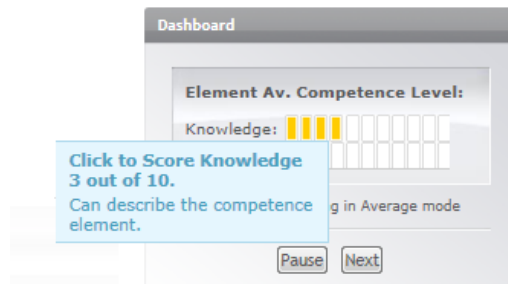
Current Domain:
Technical Competence Domain
Domain Progress: 0 %


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:

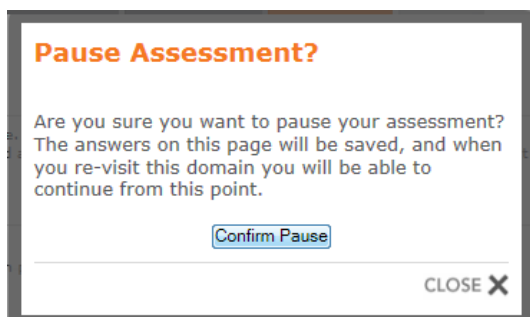


When you have selected an appropriate score for the individual you are assessing then click the  button to continue to the next.

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.

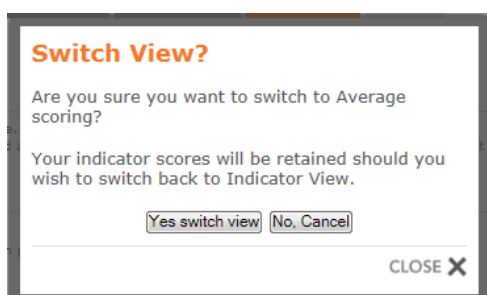
Switching scoring modes

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:

Compass (Demo) - Windows Internet Explorer

https://compass.qa.com/uk/assess/cfAssessments/element.jsp?domainId=1&domainName=Technical Competence Domain

Compass (Demo)

QA

WelcomeYour DetailsInstructionsAssessmentResults

PROJECT SUCCESS AND BENEFITS MANAGEMENT (TC02)

Definition

Project success is the satisfaction of stakeholder needs and is measured by the success criteria as identified and agreed at the start of the project. Benefits management is the identification of the benefits at an organisational level and the monitoring and realisation of those benefits.

Indicators

1. Analyses and understands the project and its context within the proposed business change and how these can enable the expected benefits (indirect, direct, financial and non-financial).

K

E

2. Agrees success criteria for the project with the sponsor, ensuring they are measurable.

K

E

3. Identifies critical success factors for the project with stakeholders.

K

E

4. Agrees KPIs ensuring these are quantitative by using traditional time, cost and quality techniques.

K

E

5. Understands the relationship between the timing of deliverables and the realisation of benefits.

K

E

6. Discusses and agrees the project success criteria and benefits realisation responsibilities with all relevant stakeholders as part of the project management contract with the customer.

K

E

7. Executes and controls PM plans and changes, and reports on project performance.

K

E

8. Ensures that the impacts of any deviations from plan are considered against the business case and the benefits realisation plan, and are escalated to the responsible stakeholders.

K

E

9. Collects results and prepares project performance reports against the agreed KPIs and anticipated benefits, and communicates to relevant stakeholders.

K

E

10. Ensures that benchmark data is captured against which benefit realisation can be measured.

K

E

PreviousPauseFinish

Dashboard

Element Av. Competence Level:

Knowledge:

Experience:

Currently answering in Indicator mode

PreviousPauseFinish

Scoring ModeClear Scores

Current Domain:

Technical Competence Domain

Domain Progress: 50 %

Supporting Evidence:

Enter your supporting evidence here for the scores given.

You will now be able to score each competence at indicator level for Knowledge (K) and Experience (E).

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.

The screenshot shows the Compass (Demo) web application in a Windows Internet Explorer browser. The URL is <https://compass.qa.com/uk/assess/cfAssessments/element.jsp?domainId=1&domainName=Technical Competence Domain>. The page title is "Compass (Demo)". The navigation bar includes tabs: Welcome, Your Details, Instructions, 180 Review, Questionnaire, Assessment, and Results. The main content area is titled "CONCEPT (TC01)" and contains a "Definition" section and a list of "Indicators" (1-8). Each indicator has a "K" (Knowledge) and "E" (Experience) column with a progress bar. The "Dashboard" sidebar on the right shows "Element Av. Competence Level" for Knowledge and Experience, "Currently answering in Indicator mode", "Scoring Mode" (with a "Clear Scores" button circled in red), "Current Domain: Technical Competence Domain", "Domain Progress: 0%", and a "Supporting Evidence" text area.

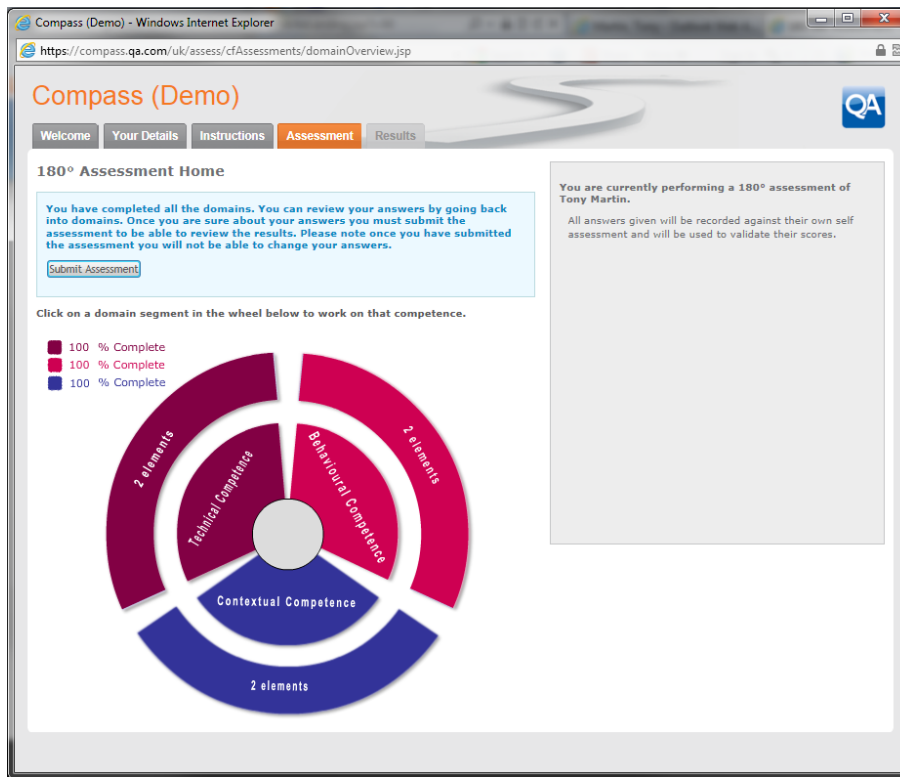
The following message will appear:

The dialog box is titled "Clear Scores?". It contains the text "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.

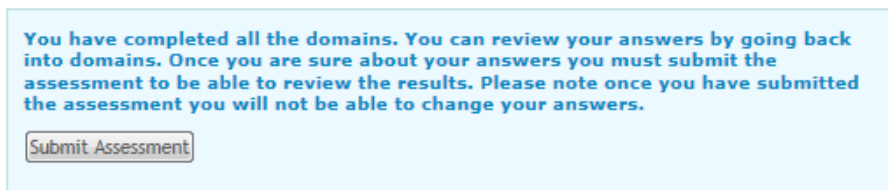
Click the **Yes Clear Scores** button to clear all the scores you have entered or the **No, Cancel** button to return to the existing scores.

Finishing the assessment

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



The following message will be displayed:

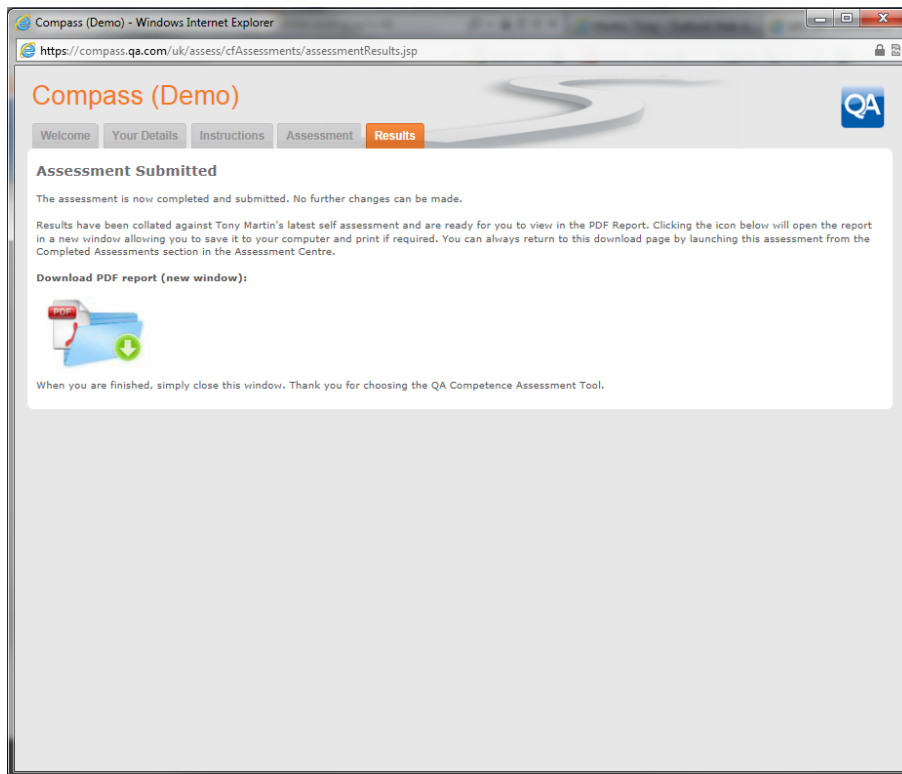


If you are happy to continue, click the **Submit Assessment** button.

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

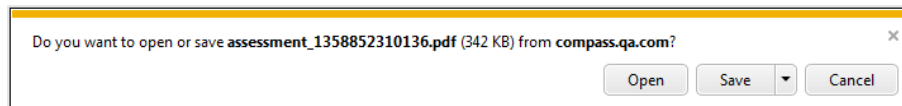
NOTE: Your scores are saved automatically and if you wish to close the assessment window and return to submit your scores later, then you will not lose the information you have already entered.

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.

