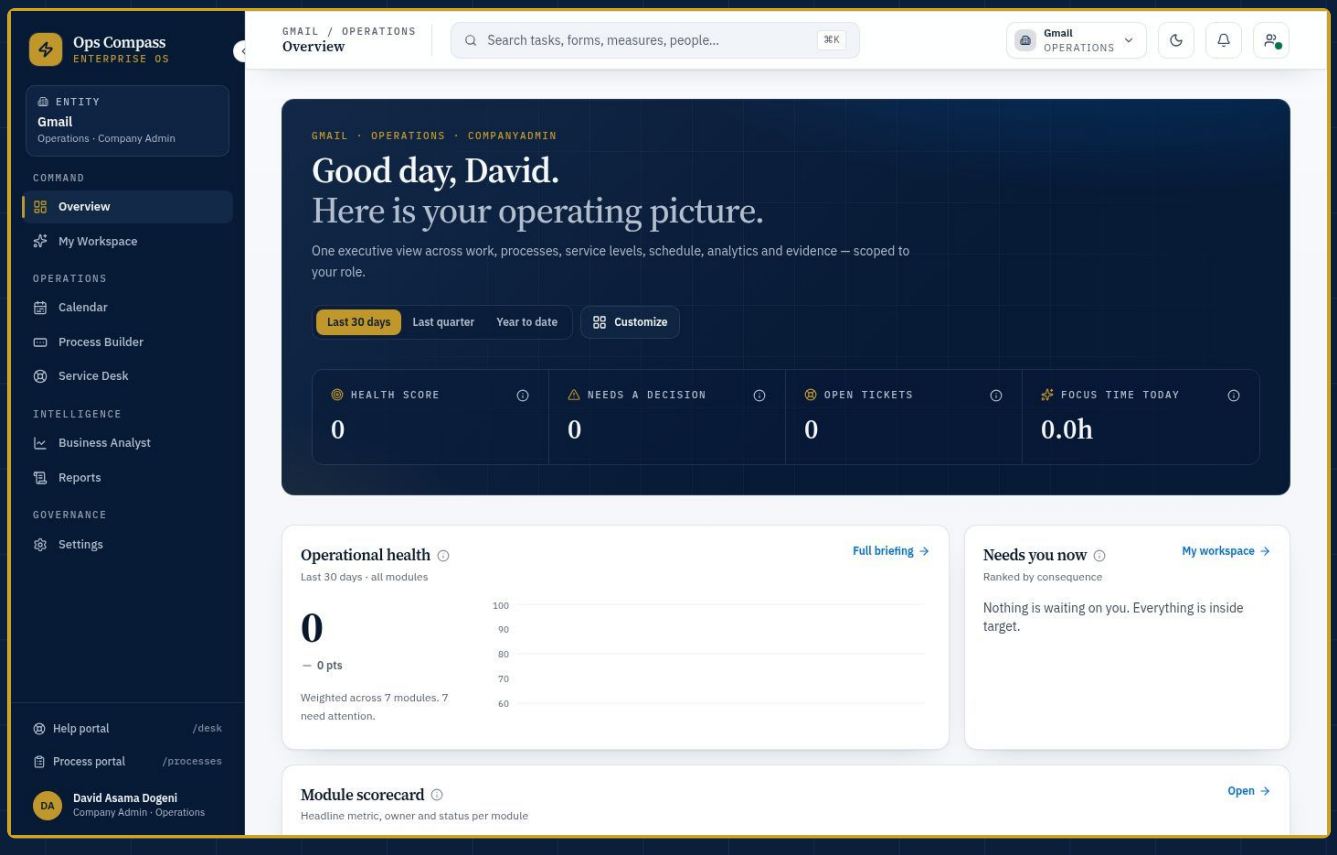
Ops Compass AI

THE AI BUSINESS OPERATING SYSTEM

USER MANUAL · HELP & DOCUMENTATION

Run the whole business from one compass.

Step-by-step guidance with screenshots for every module, portal and role.



Edition November 2026 · 52 guides · compass.1879techhub.com/help

ABOUT THIS MANUAL

How to use this manual

This manual collects every guide from the in-app Help & Docs centre. Each chapter covers one area of Ops Compass; each guide says who it is for, where to find the feature, and walks through it step by step with screenshots. The online help centre at /help is always the most current version and can filter guides to your role.

ROLE	WHAT IT COVERS
Team member	Runs tasks, checklists, forms and requests day to day
Builder	Designs processes, checklists, reports and dashboards
Department admin	Runs a department: people, service levels, settings
Company admin	Governs the whole organisation and its security
External collaborator	Invited from a partner company into shared work
Partner employee	Logs and tracks tickets through the partner desk
Visitor	Books a meeting through a public booking link

Find what applies to you
Every guide lists the roles it is written for. If a guide is for a role you do not hold, those screens may be hidden for you. Ask your administrator if you need access.

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CHAPTER 1

Getting started

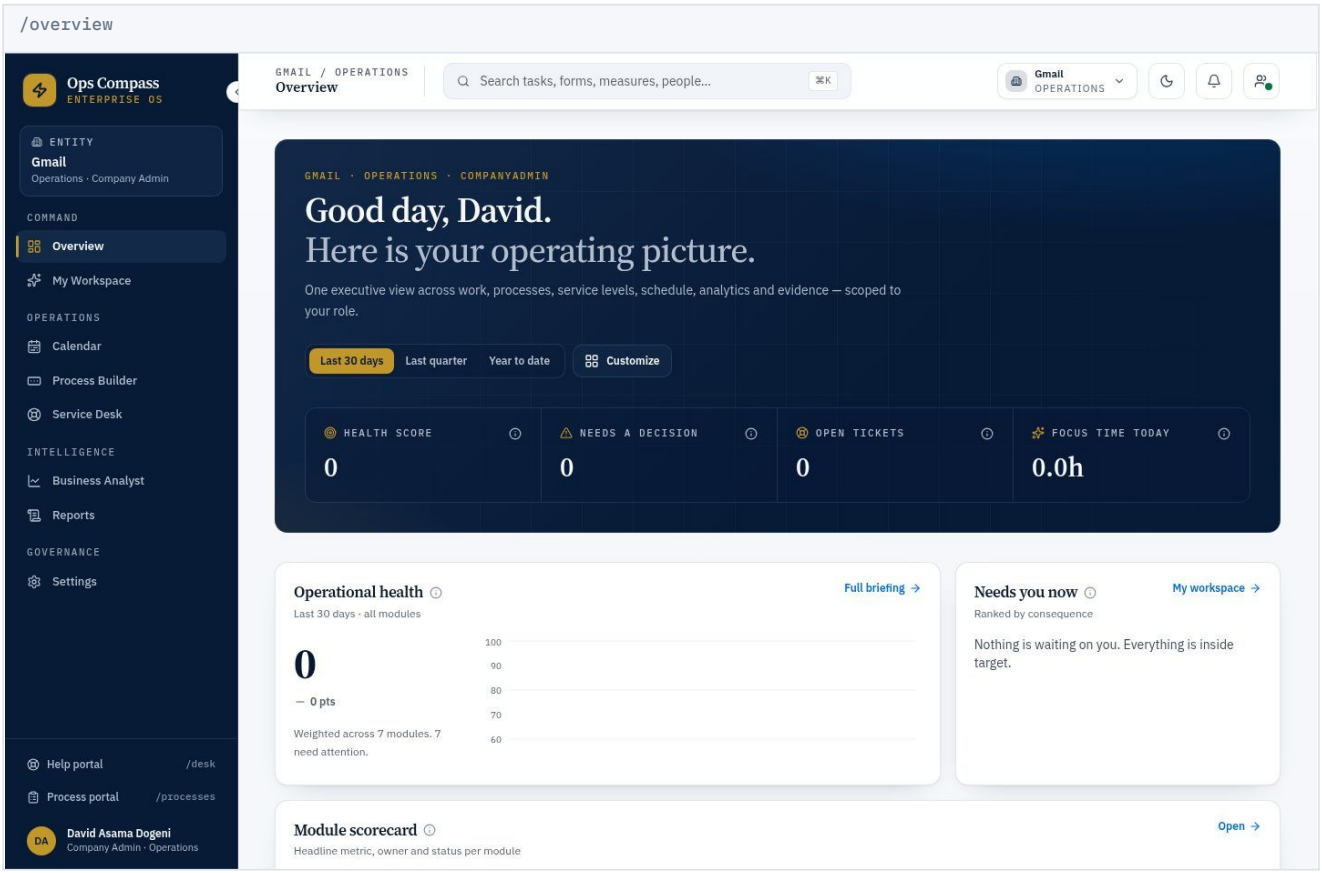
Sign in, find your way and understand roles.

GETTING STARTED

Welcome to Ops Compass

What Ops Compass is, how the product is organised and which part of it you will use first.

For: Every role · **Where:** Everywhere · 2 min read



One operating system for the whole business

Ops Compass brings the day-to-day running of a business into one place: tasks and delegation, standard operating procedures turned into digital processes, checklists, service desk tickets with service levels, calendars and bookings, key performance indicators, reports and a tamper-evident audit trail. Buddy, the built-in assistant, works across all of it.

Everything you see is scoped to your company and department. Your colleagues in other companies on the platform can never see your data, and within your company each department keeps its own work, settings and audit history.

The product at a glance

AREA	MODULES	WHAT IT DOES FOR YOU
Command	Overview, My Workspace	Your operating picture and your personal task board.
Operations	Calendar, Checklists, Process Builder, Service Desk	Run the daily work: schedules, routines, digital SOPs and requests.
Intelligence	Business Analyst, Reports	Connect business systems, track KPIs, ask questions and export board-ready reports.
Governance	Audit Trail, Settings	Evidence of every action and the rules the analyst and scorecards follow.

Alongside the main workspace there are focused portals for people who only need one job done:

PORTAL	ADDRESS	WHO USES IT
Help portal	/desk	Anyone raising an incident or service request; technicians working the queue.
Process portal	/processes	Anyone filling in a published form, tracking submissions, KPIs and dashboards.
Admin portal	/admin	Company and department administrators.
Partner desk	/partner	Employees of partner organisations logging tickets with you.
Booking pages	/book/...	Visitors booking a meeting through a shared link.

Your first ten minutes

1. Sign in with the work email your administrator invited (see “Signing in and staying secure”).
2. Check the entity card at the top of the left menu — it shows the company and department you are working in.
3. Open Overview to see what needs a decision, then My Workspace to see your tasks.
4. Press Ctrl + K (Cmd + K on Mac) to search for any page, task, form or person.
5. Open Buddy from the bottom-right corner and ask “What should I do first today?”.

> **Filter this help centre to your role**
> Use the “I am a...” selector at the top of the help centre. It hides guides for screens your role cannot open, so you only read what applies to you.

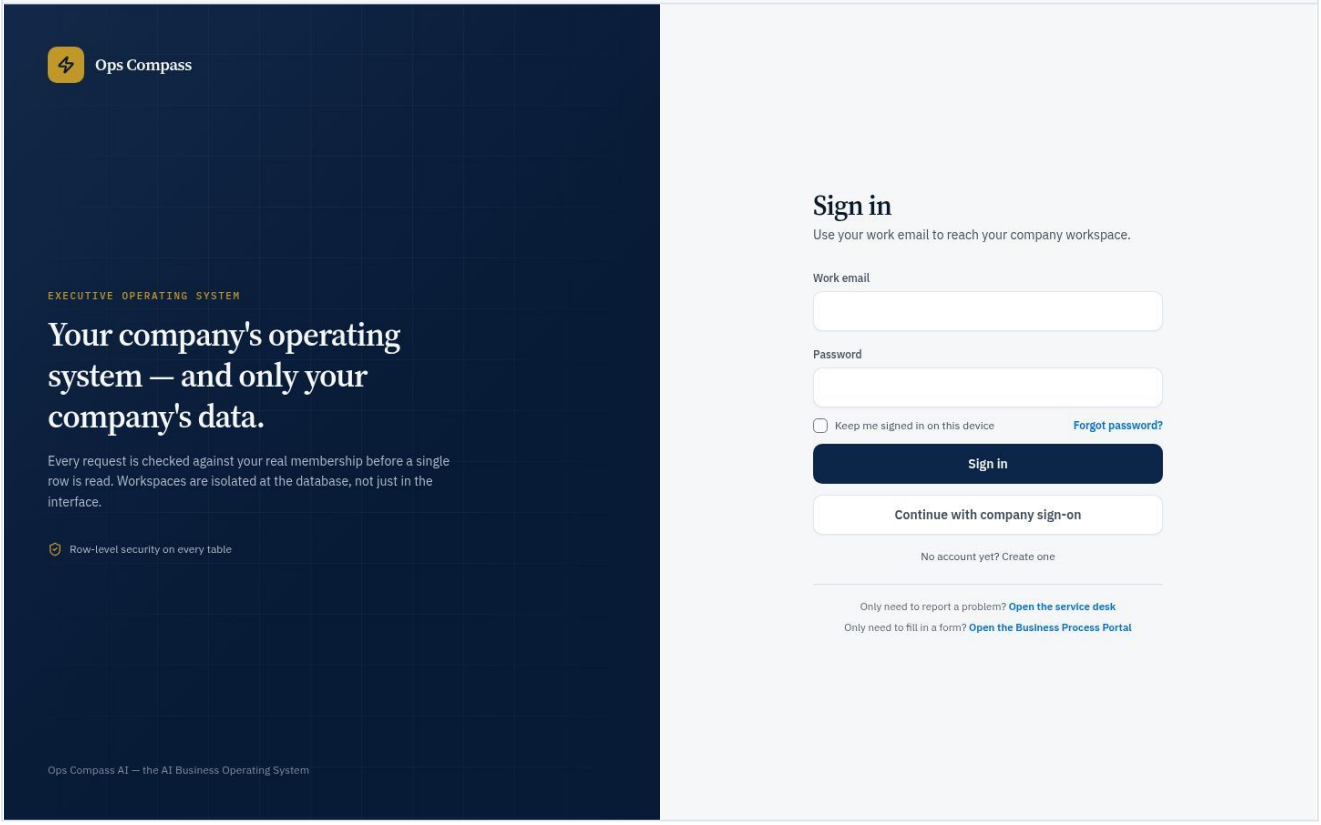
GETTING STARTED

Signing in and staying secure

Which sign-in page to use, how long you stay signed in, company sign-on, two-step verification and how to reset a forgotten password.

For: Every role · **Where:** Sign-in pages · 3 min read

/auth



Pick the right door

PAGE	ADDRESS	USE IT WHEN
Workspace sign-in	/auth	You use the full product (most staff).
Help portal sign-in	/desk/login	You only want to raise or track a request.
Process portal sign-in	/processes/login	You only fill in forms and follow your submissions.
Admin portal sign-in	/admin/login	You administer people, departments or security.
Partner sign-in	/partner/login	You work for a partner organisation and were given an external account.

All staff pages accept the same work account — the portals are simply quicker routes to one job.

Sign in

1. Enter your work email and password.
2. Tick “Keep me signed in on this device” only on a personal, trusted computer.
3. Select Sign in. If your company uses single sign-on, select “Continue with company sign-on” instead and follow your identity provider’s prompts.

> **How long a session lasts**
> By default your sign-in ends when you close the browser and after 30 minutes without activity. “Keep me signed in” keeps you signed in on that device until you sign out. The standalone portals always end the session when the browser closes.

Two-step verification

Two-step verification adds a 6-digit code from an authenticator app on your phone (Microsoft Authenticator, Google Authenticator or similar) after your password, so a stolen password alone can't open your account.

WHO	TWO-STEP VERIFICATION
Company admins, department admins and platform admins	Required. You're asked to set it up at your first sign-in and can't turn it off while you hold an admin role.
Everyone else	Optional. Turn it on from your account menu -> Two-step verification.

Set it up

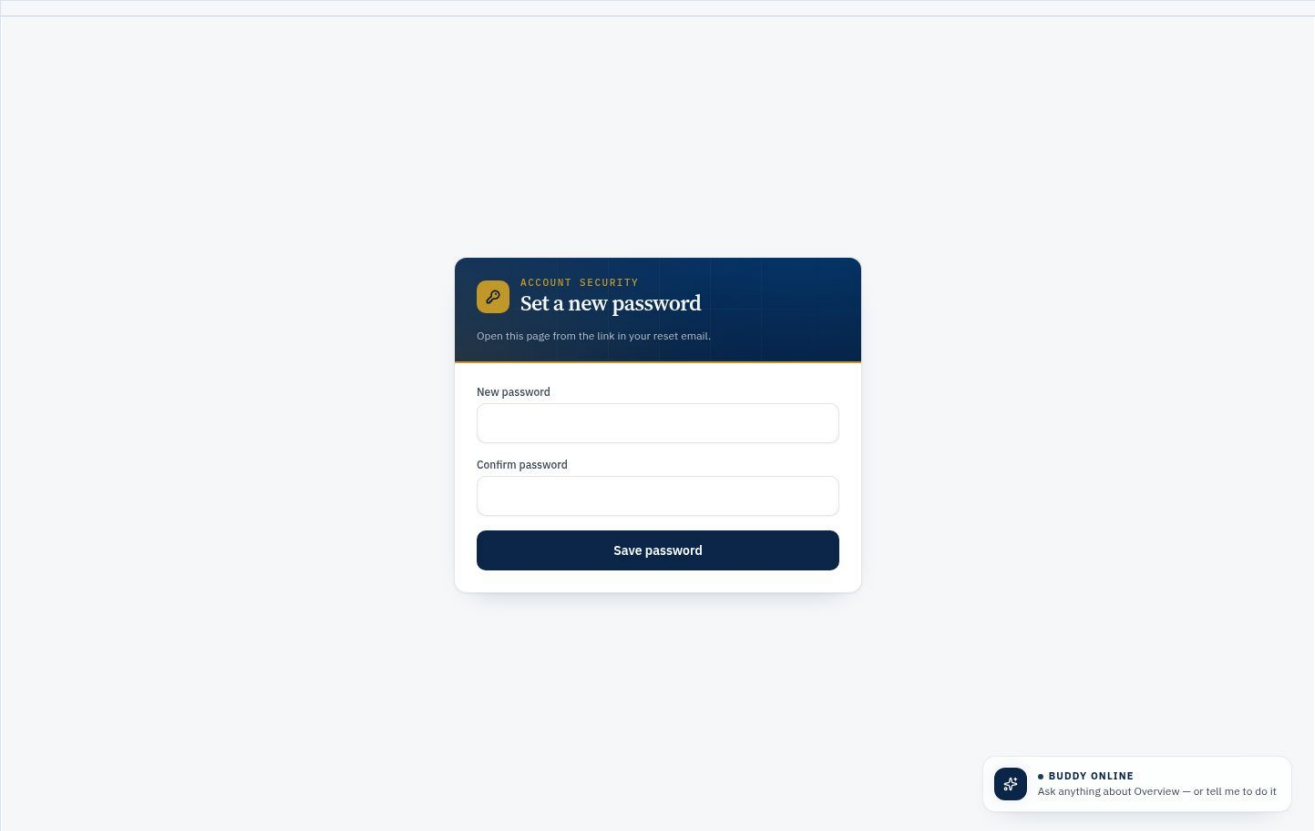
1. Sign in with your password. Administrators go straight to set-up; others open account menu -> Two-step verification -> Turn on.
2. In your authenticator app, add an account and scan the QR code (or select “Can't scan?” and type the key).
3. Enter the 6-digit code the app shows and select Confirm and turn on.

From then on, every sign-in asks for the current code after your password. If a code is refused, check your phone sets its time automatically and use the newest code.

> **Lost or replaced your phone?**
> Ask a company administrator to reset two-step verification for you: Admin portal -> People -> the access history button next to your name -> Two-step verification -> Reset. They should confirm who you are first. You'll be signed out everywhere and can set up your new phone at the next sign-in.

Forgotten password

1. On the sign-in page select “Forgot password?” and enter your work email.
2. Open the reset email and follow the link. It opens the “Set a new password” page.
3. Enter and confirm a new password, then select Save password. Passwords that appear in known data breaches are refused.



The secure “Set a new password” page opened from the reset email.

> **Important**
> Repeated failed sign-ins are recorded on the security dashboard. If you did not try to sign in and receive a reset email, tell your administrator.

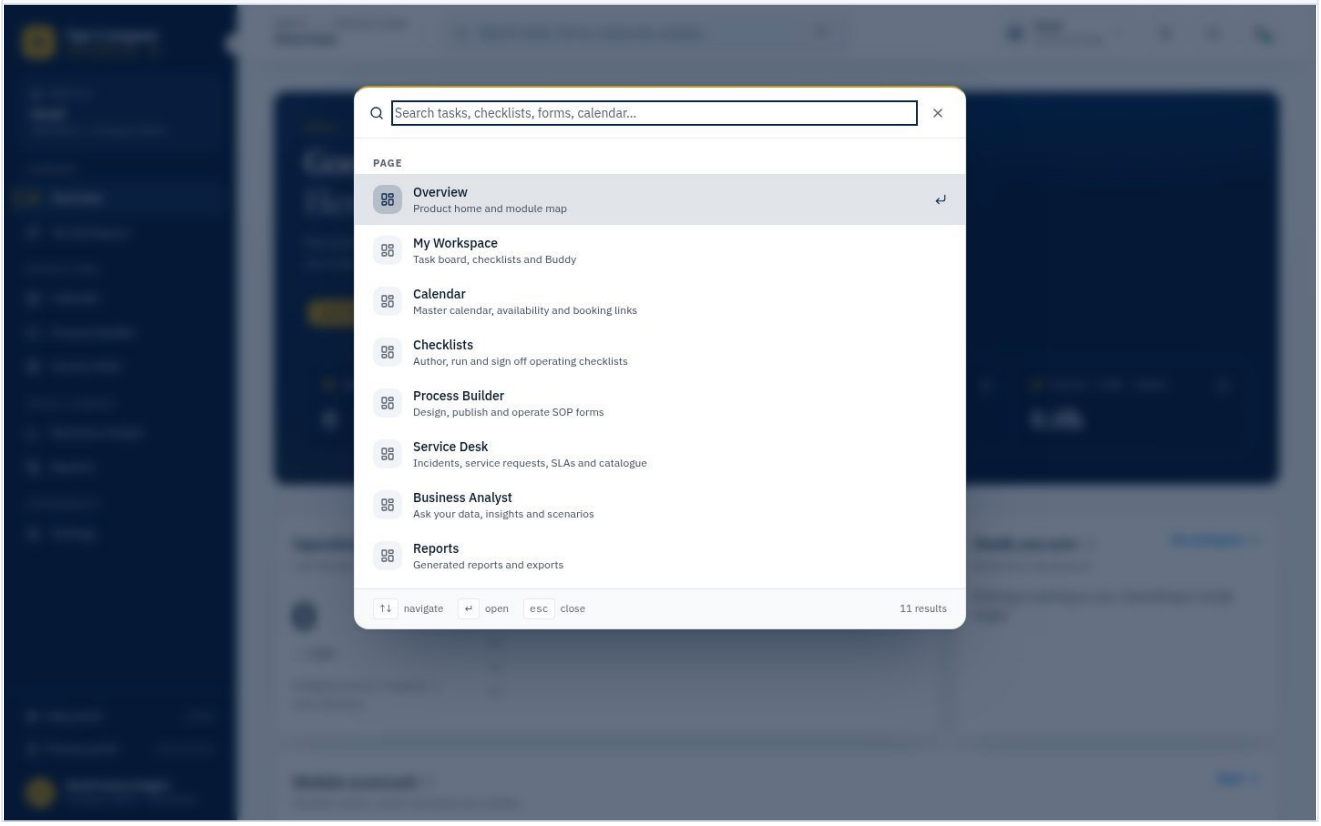
GETTING STARTED

Finding your way around

The navy menu, the entity switcher, search, notifications, the live status, themes and keyboard shortcuts.

For: Team member, Builder, Department admin, Company admin, External collaborator · **Where:** Left menu and top bar · 3 min read

/overview



The left menu

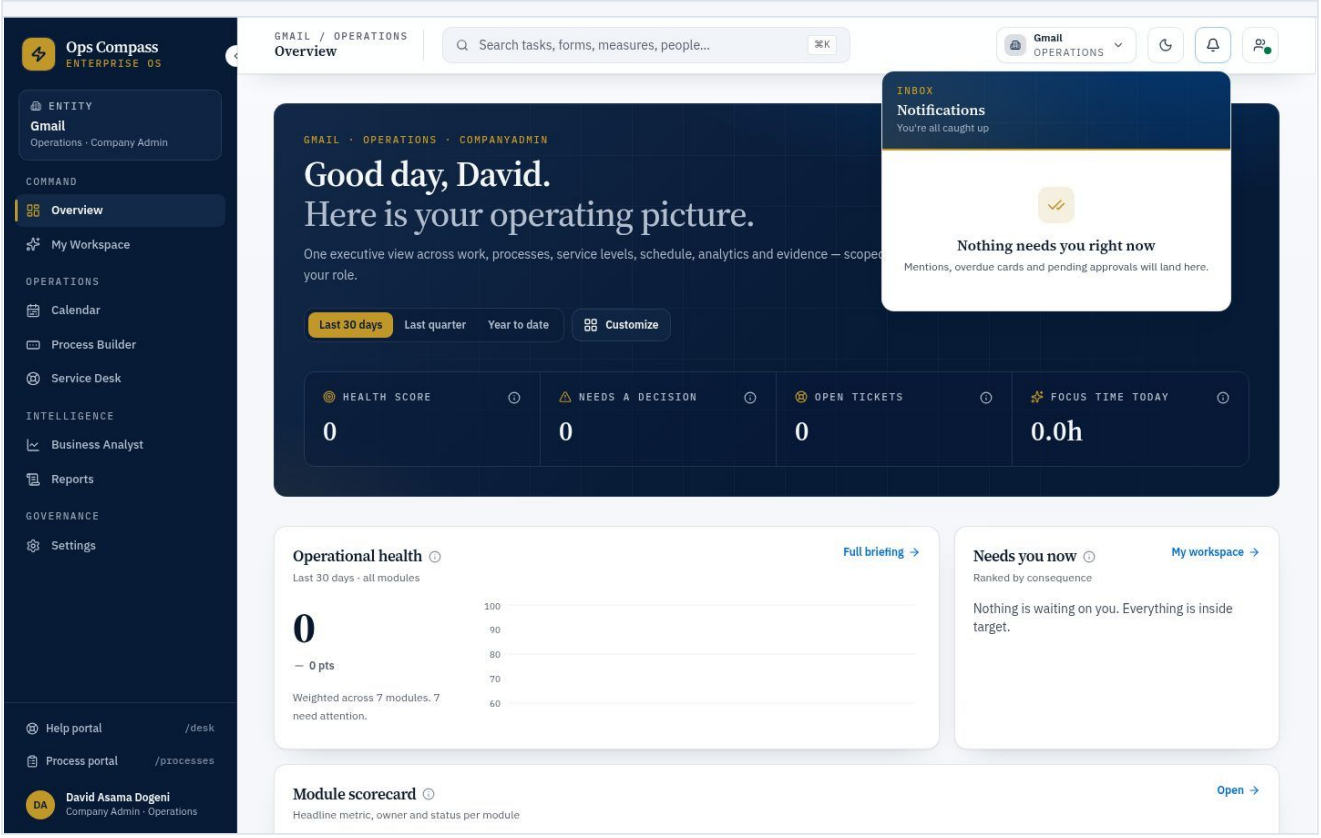
The navy menu groups modules into Command, Operations, Intelligence and Governance. A gold bar marks the page you are on. Modules you have not been granted do not appear at all. Help portal and Process portal links sit at the bottom, above your name.

- Collapse the menu with the arrow on its edge (or press [in a portal) to get more room. Your choice is remembered on this device.
- On a phone, the most used modules move to a bar at the bottom of the screen.

The top bar

CONTROL	WHAT IT DOES
Search (Ctrl/Cmd + K)	Jump to any page, task, checklist, form, measure or person. Use the arrow keys and Enter.
Company switcher	Move between the companies and departments you belong to.
Theme	Switch between the light Boardroom theme (default) and the dark Night boardroom theme.
Notifications (bell)	Everything that needs you, on every device: tasks assigned or delegated to you, approvals waiting, requests landing in your queue or assigned to you, replies, and progress on requests you raised. Also mentions and due or overdue cards. New items pop up as they arrive; a gold dot marks unread items and clicking one opens the exact task or request. The bell is also on the Help, Process and Partner portals.

CONTROL	WHAT IT DOES
Email alerts	Alerts you haven't opened within two minutes are also emailed to you: tickets, approvals, tasks and mentions. Choose which from your account menu -> Email alerts. Meeting invitations and new requests raised with your department are always emailed.
Live status	Shows who else from your company is online. Live, Paused or Offline.



Notifications open from the bell; unread items carry a gold marker.

WHEN THIS HAPPENS	WHO IS NOTIFIED
A colleague assigns you a task or delegates one to you	You
You finish, decline or update a task someone gave you	The person who gave it to you
A task needs your approval / your approval request is decided	The approver / the task owner
A request is raised with a department	The assigned person — or everyone on that desk while it is unassigned; the approver when it needs approval
A request is assigned, reassigned or picked up	The new owner, and the requester
A request changes status or the team replies	The requester (internal team notes never notify them)
A request is resolved	The requester, asking them to confirm the fix
The requester confirms, sends it back or replies	The person handling it

> **Tip**
> You are never notified about your own actions.

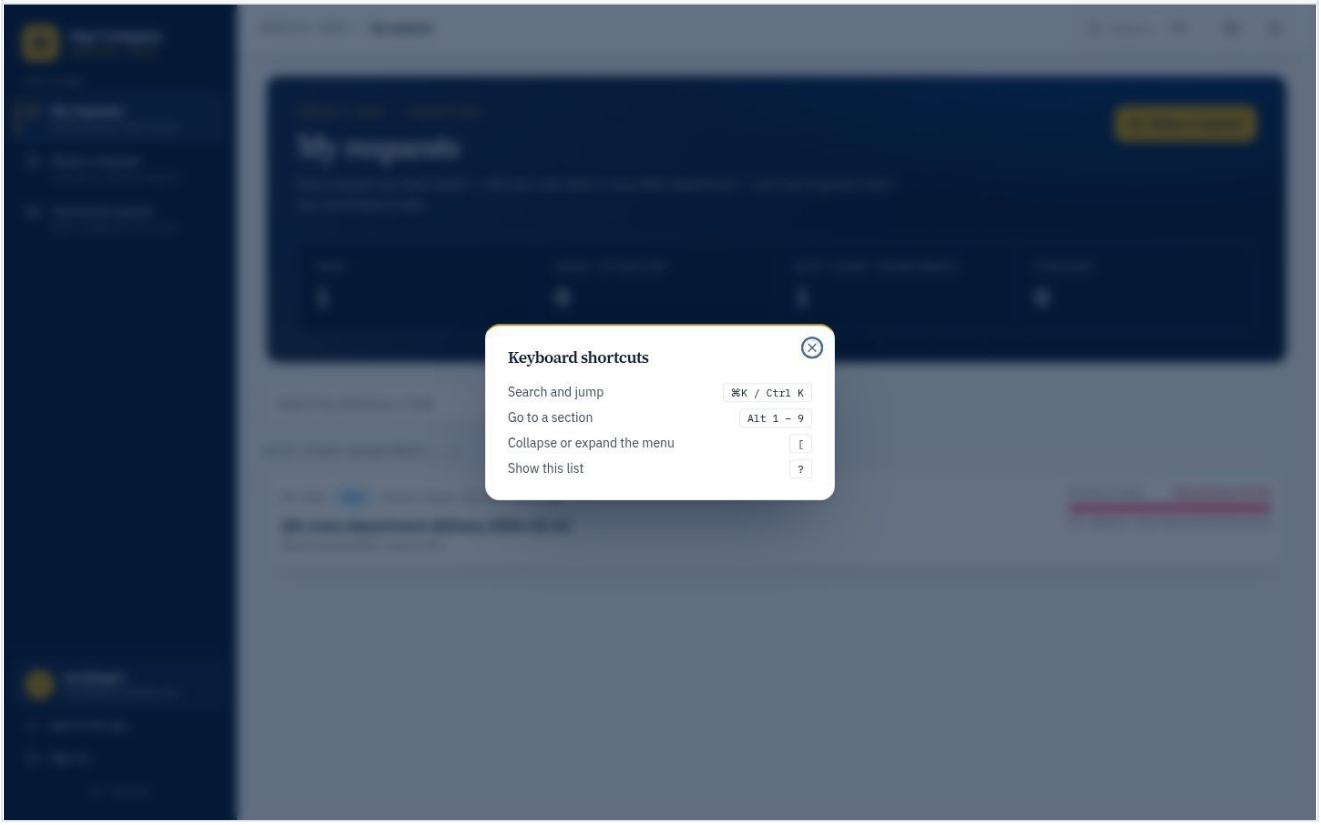
What Live, Paused and Offline mean

The live status only describes the colleague-presence connection — who is online and who is editing what. It does not control saving. Your changes are saved to the server when you make them; if you are Offline, saves wait until your connection returns, so stay on the page until you are back online.

> **Tip**
> If the status stays on Paused, open it and select “Try again”.

Keyboard shortcuts

KEYS	ACTION
Ctrl/Cmd + K	Search and jump
?	Show the shortcut list (portals)
[	Collapse or expand the menu (portals)
Alt + 1 … 9	Go to a portal section
Esc	Close a pop-up or panel



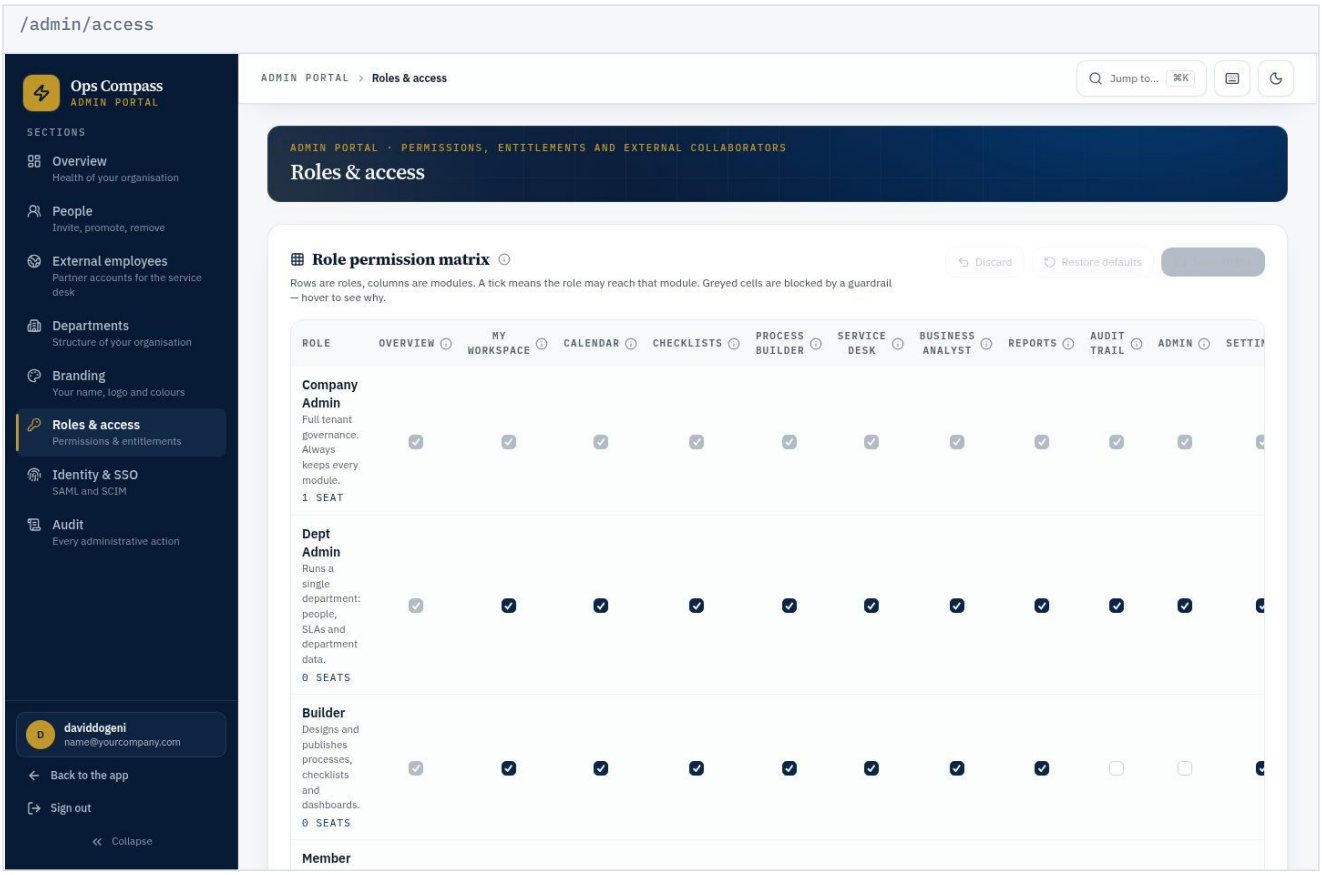
Press ? in any portal to see its shortcuts.

GETTING STARTED

Roles and permissions explained

The five roles, what each one can do, and how module access narrows what a person can open.

For: Every role · **Where:** Admin portal › Roles & access · 2 min read



The roles

ROLE	TYPICAL PERSON	IN SHORT
Company admin	COO, head of operations, IT lead	Governs the whole organisation: departments, branding, sign-on, every department's audit events.
Department admin	Head of a department	Runs one department: people, service desk set-up, settings, audit trail for the department.
Builder	Process owner, analyst	Designs and edits processes, checklists, reports and dashboards; opens the Business Analyst.
Member	Most employees	Does the work: tasks, checklists, forms, requests; can view reports.
External collaborator (Guest)	Supplier, contractor	Sees only work shared with them, within the scopes and expiry date set.

A role belongs to a department. The same person can be a Builder in Operations and a Member in Finance — Ops Compass always uses the role held in the department you are working in.

What each role can do

CAPABILITY	COMPANY ADMIN	DEPT ADMIN	BUILDER	MEMBER	GUEST
Author checklists, processes and reports	Yes	Yes	Yes	—	—
Publish authored work	Yes	Yes	—	—	—
Manage department members	Yes	Yes	—	—	—
Manage company and departments	Yes	—	—	—	—
Manage external collaborators	Yes	Yes	—	—	—
Change governance settings and KPI parameters	Yes	Yes	—	—	—
Open the Business Analyst	Yes	Yes	Yes	—	—
View reports	Yes	Yes	Yes	Yes	—
Export evidence files	Yes	Yes	Yes	—	—
View the audit trail	Yes	Yes	—	—	—
See audit events across all departments	Yes	—	—	—	—
Configure service levels and assign tickets	Yes	Yes	—	—	—

Module access can only narrow a role
Company admins can switch individual modules off for a person under Roles & access. That can hide a module the role would allow, but it can never grant something the role does not carry.

Hidden is not the only protection

Screens you cannot use are hidden to keep the product clean, but every action is also checked again on the server and in the database. Changing the page in your browser never gives you more access.

GETTING STARTED

Companies and departments

How work is separated by company and department, and how to switch between the ones you belong to.

For: Team member, Builder, Department admin, Company admin · **Where:** Top of the left menu (entity card) and top bar switcher · 1 min read

Everything is scoped

Each company is a sealed space. Inside it, every department has its own tasks, checklists, processes, service desk queue, settings and audit history. Some records are deliberately shared: cross-department tickets, company-wide delegation and company-level settings such as branding.

Switch department

1. Open the company switcher in the top bar (it shows the company and department names).
2. Choose the membership you want. The whole product reloads with that department's data and your role there.

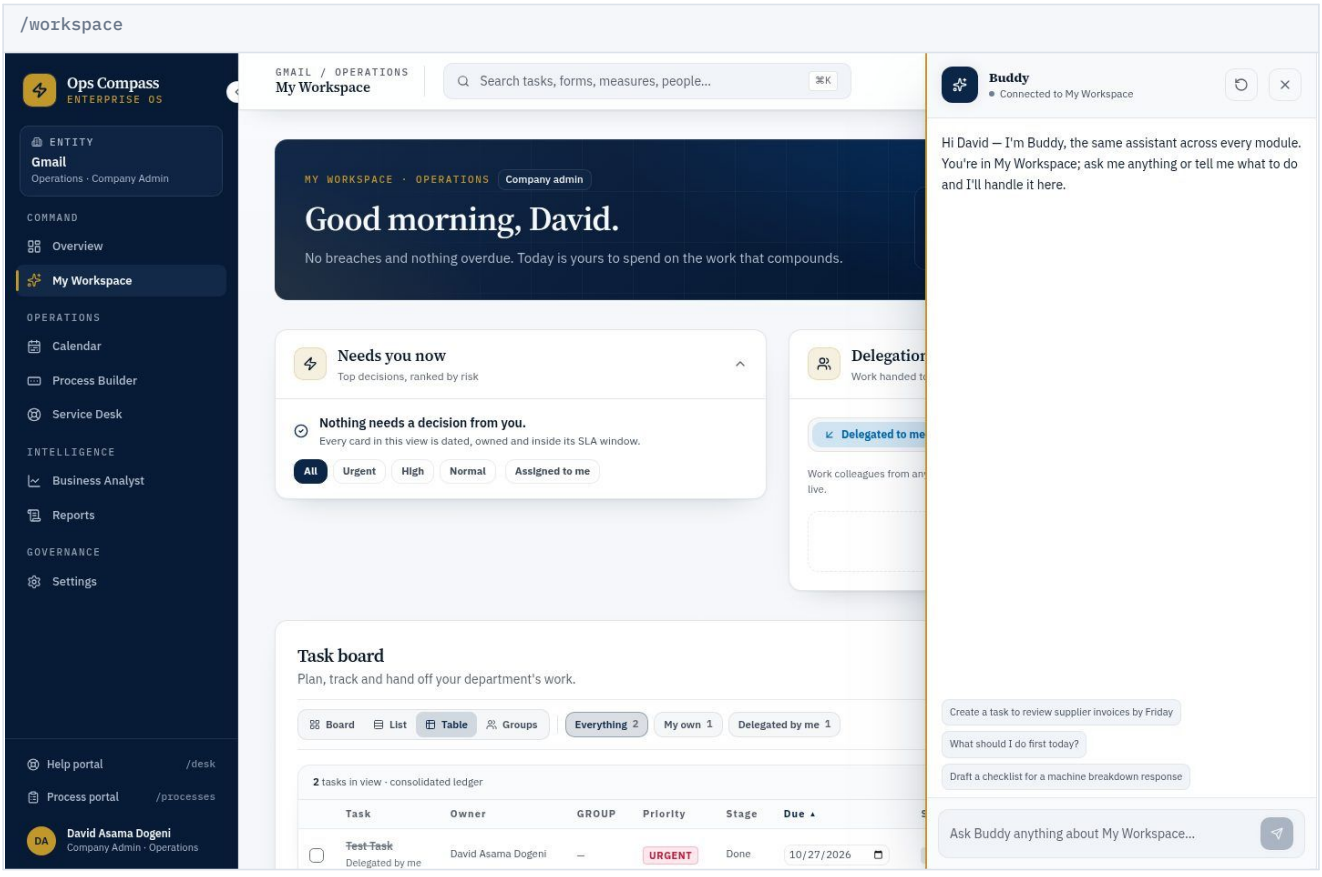
> **Tip**
> If a department you expect is missing, ask a company admin to add you to it in Admin portal › People.

GETTING STARTED

Buddy, your AI assistant

Ask questions about any module, or tell Buddy to create tasks, checklists, tickets, meetings and reports for you.

For: Team member, Builder, Department admin, Company admin · **Where:** Bottom-right corner of every page · 1 min read



What Buddy can do

Buddy knows which module you are in and works with your real data and permissions. It can answer questions, suggest next steps and carry out actions on your behalf.

- Answer: "What is overdue in my department?"
- Create a task: "Create a task to review supplier invoices by Friday."
- Draft a checklist: "Draft a checklist for a machine breakdown response."
- Raise a ticket, propose a meeting, start a report or surface an insight.
- Navigate: "Take me to the SLA settings."

Use Buddy

1. Select the Buddy card in the bottom-right corner.
2. Pick a suggestion or type your request, then press Enter.
3. Review what Buddy proposes. Actions show a card you can open or undo.
4. Use the reset arrow to start a fresh conversation.

Good to know
Buddy can only do what your role allows, and it never sees other companies' data. Read "AI and confidentiality" for how AI requests are handled.

GETTING STARTED

Install Ops Compass on your computer or phone

Add Ops Compass to your Mac, Windows PC, iPhone, iPad or Android phone so it opens in its own window from your Dock, Start menu or home screen.

For: Every role · **Where:** Left menu › Install app, or your account menu › Install app · 2 min read

What installing gives you

Ops Compass installs from your browser, with no app store or download file needed. Once installed it has its own icon, opens in its own window without browser tabs, and stays up to date by itself. You sign in exactly as you do on the website, and your data stays in your company workspace, not on the device.

Fastest way
Select Install app in the left menu (or in your account menu on a phone). In Chrome and Edge a one-click install dialog opens. In Safari you will see the steps for your device.

Windows or Mac with Chrome or Microsoft Edge

1. Open Ops Compass in Chrome or Edge and sign in.
2. Select Install app in the left menu, or the install icon at the right end of the address bar.
3. Select Install. Ops Compass appears in your Start menu (Windows) or Applications and Launchpad (Mac).
4. Optional: right-click the taskbar or Dock icon and pin it.

Mac with Safari

1. Open Ops Compass in Safari (macOS Sonoma or later).
2. In the menu bar choose File › Add to Dock.
3. Select Add. Ops Compass opens from the Dock and Launchpad like any other app.

iPhone or iPad

1. Open Ops Compass in Safari.
2. Tap the Share button (the square with an arrow pointing up).
3. Scroll down and tap Add to Home Screen, then tap Add.
4. Open Ops Compass from your home screen and sign in.

Android phone or tablet

1. Open Ops Compass in Chrome.
2. Tap Install app in the account menu, or tap the ⋮ menu and choose Install app.
3. Tap Install. The app appears on your home screen and in your app drawer.

Questions

I can't see Install app.

The app is already installed on this device, or you are using a browser that can't install apps (such as Firefox on a computer). Use Chrome, Edge or Safari instead.

Does it work without internet?

Ops Compass needs a connection to load your work. If you lose connection, the app shows an offline screen and reconnects by itself when you are back online.

How do I update it?

You don't need to. The installed app always loads the latest version.

How do I remove it?

Remove it like any other app: drag it out of the Dock on a Mac, uninstall it from Start or Settings › Apps on Windows, or press and hold the icon on a phone and choose Remove.

CHAPTER 2

Overview & Workspace

Your operating picture, tasks and delegation.

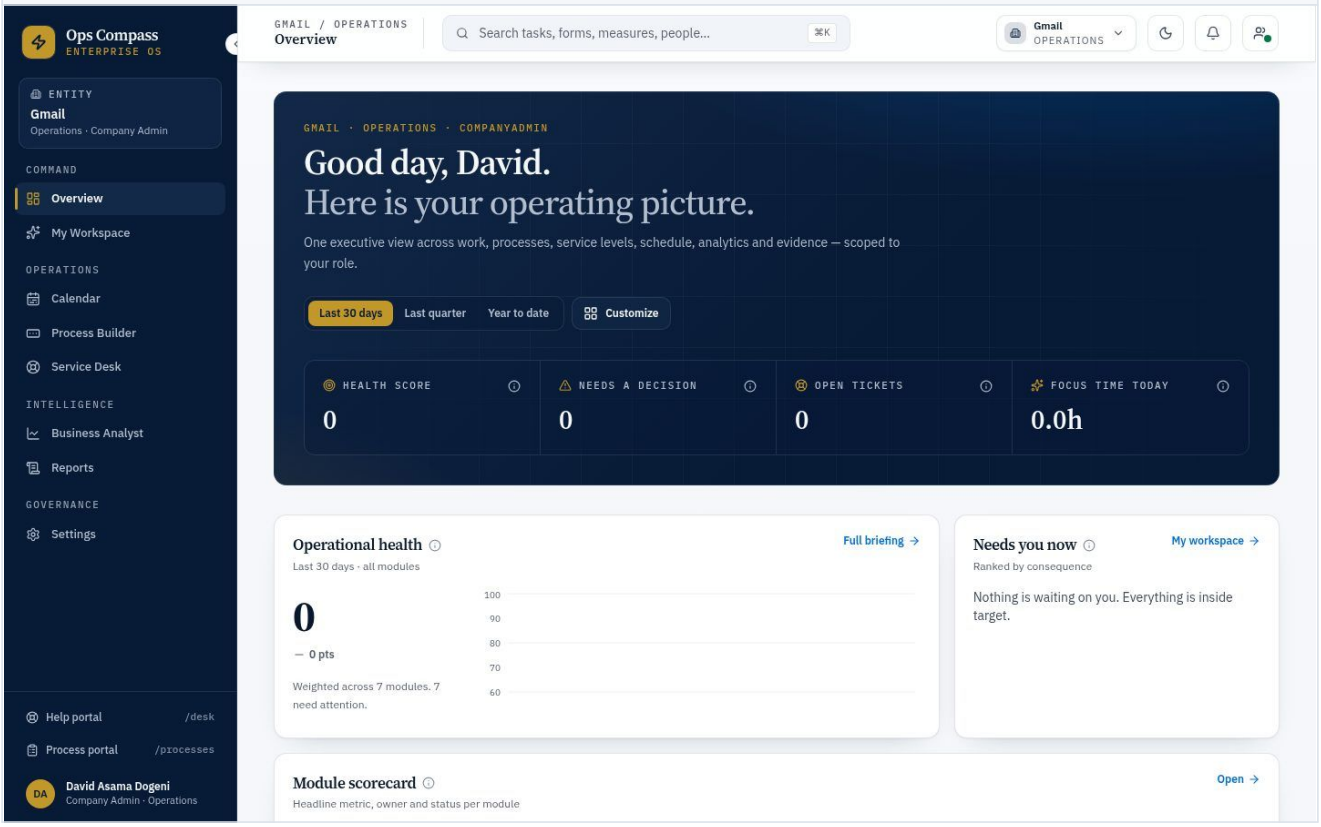
OVERVIEW & WORKSPACE

Overview: your operating picture

The executive home page — health score, decisions waiting, open tickets, focus time and the module scorecard.

For: Team member, Builder, Department admin, Company admin, External collaborator · **Where:** Sidebar › Command › Overview · 1 min read

/overview



Reading the page

ELEMENT	MEANING
Health score	A weighted score of every module for the selected period. It only uses real activity — with no data it shows 0 or a dash rather than an invented figure.
Needs a decision	Items escalated to you or waiting for your approval.
Open tickets	Live incidents and requests in your department.
Focus time today	Protected time left on your calendar.
Operational health	The trend of the health score across the period.

ELEMENT	MEANING
Needs you now	Your most consequential items, ranked by risk.
Module scorecard	Headline metric, owner and status for each module.

Change the period

- Use Last 30 days, Last quarter or Year to date in the navy header. Every card follows the selection.

Customise your layout

1. Select Customize in the header.
2. Show, hide or reorder cards.
3. Save. Your layout is stored on your account, so it follows you to any device.

Why some numbers are empty

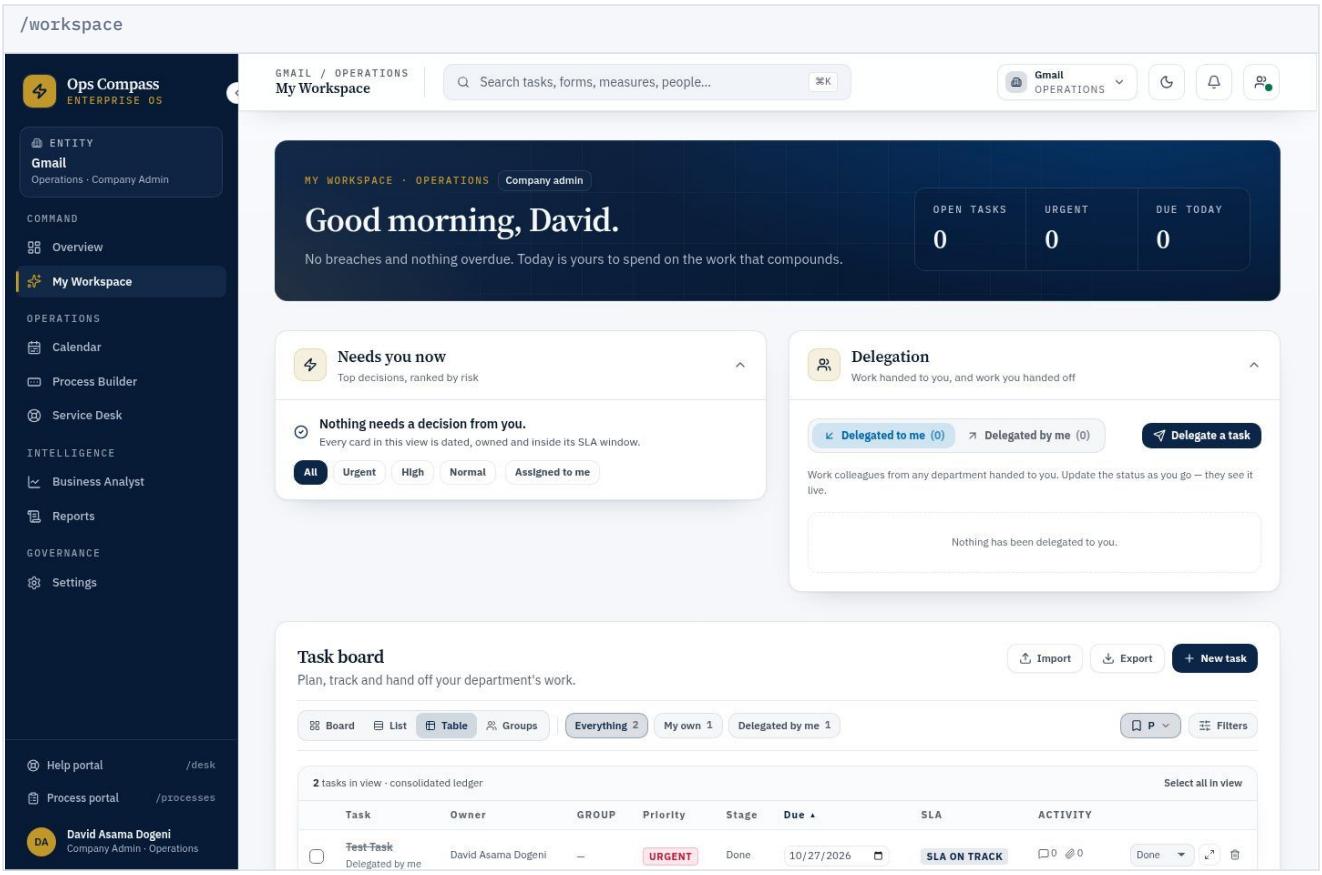
> **Good to know**
> Ops Compass never shows sample numbers on executive screens. Empty cards mean no real data exists yet — use the “Connect a system” or “Get started” prompts to fill them.

OVERVIEW & WORKSPACE

My Workspace and the task board

Plan, track and hand off your department’s work on a board, list or table, with priorities, due dates and SLAs.

For: Team member, Builder, Department admin, Company admin, External collaborator · **Where:** Sidebar › Command › My Workspace · 2 min read



What is on the page

- Header — open tasks, urgent tasks and tasks due today.
- Needs you now — the decisions that matter most, filterable by Urgent, High, Normal or Assigned to me.
- Delegation — work handed to you and work you handed off (see “Delegating work”).
- Task board — every task in your department, in the view you choose.

Create a task

1. Select New task above the board.
2. Give it a title, owner, priority (Low, Med, High, Urgent) and due date. The owner can be anyone in the company — colleagues from other departments show their department next to their name, and the task lands privately on their board. Typing “Friday” or “next week” in the due field works too.
3. Optionally add it to a group, attach files or a checklist, and add comments with @mentions.
4. Save. Move it between To do, In progress and Done as work progresses.

Views, filters and saved views

CONTROL	USE
Board / List / Table / Groups	Switch layout. Table shows owner, group, priority, stage, due date and SLA columns.
Quick filters	Everything, My own, Delegated to me, Delegated by me, From Buddy, Overdue, No due date.
View menu	Saved views, sort order and row density in one place.
Filters	Combine owner, priority, group, stage and date conditions.

> **Tip**
> Save a filter combination as a view (for example “Urgent this week”) and switch to it in one click.

Task groups

- Department admins and builders create groups and choose their members. Only they can add or remove members.
- Every member sees the group on their board and every task filed under it — including colleagues' tasks, marked “Group task · owned by …”.
- Members file their own work under the group. A colleague's group task stays read-only for you: only its owner moves or edits it, but anyone in the group can comment on it.

Comments, @mentions and alerts

1. Open a task and write in the comment box. Type @ (or select the @ button) and pick a colleague from the list to mention them.
2. Post. The task owner, the person who assigned it and everyone already in the conversation get a “commented on” alert in their bell.
3. People you @mention get a “mentioned you” alert, can open the task from it and reply — even if it is not on their board.

> **Tip**
> Comments can't be edited or removed afterwards, so the conversation is a reliable record of who said what and when.

Import and export

- Import — bring tasks in from a CSV or Excel file and map the columns.
- Export — download the current view as CSV, Excel or PDF for a meeting or as evidence.

If you are an external collaborator

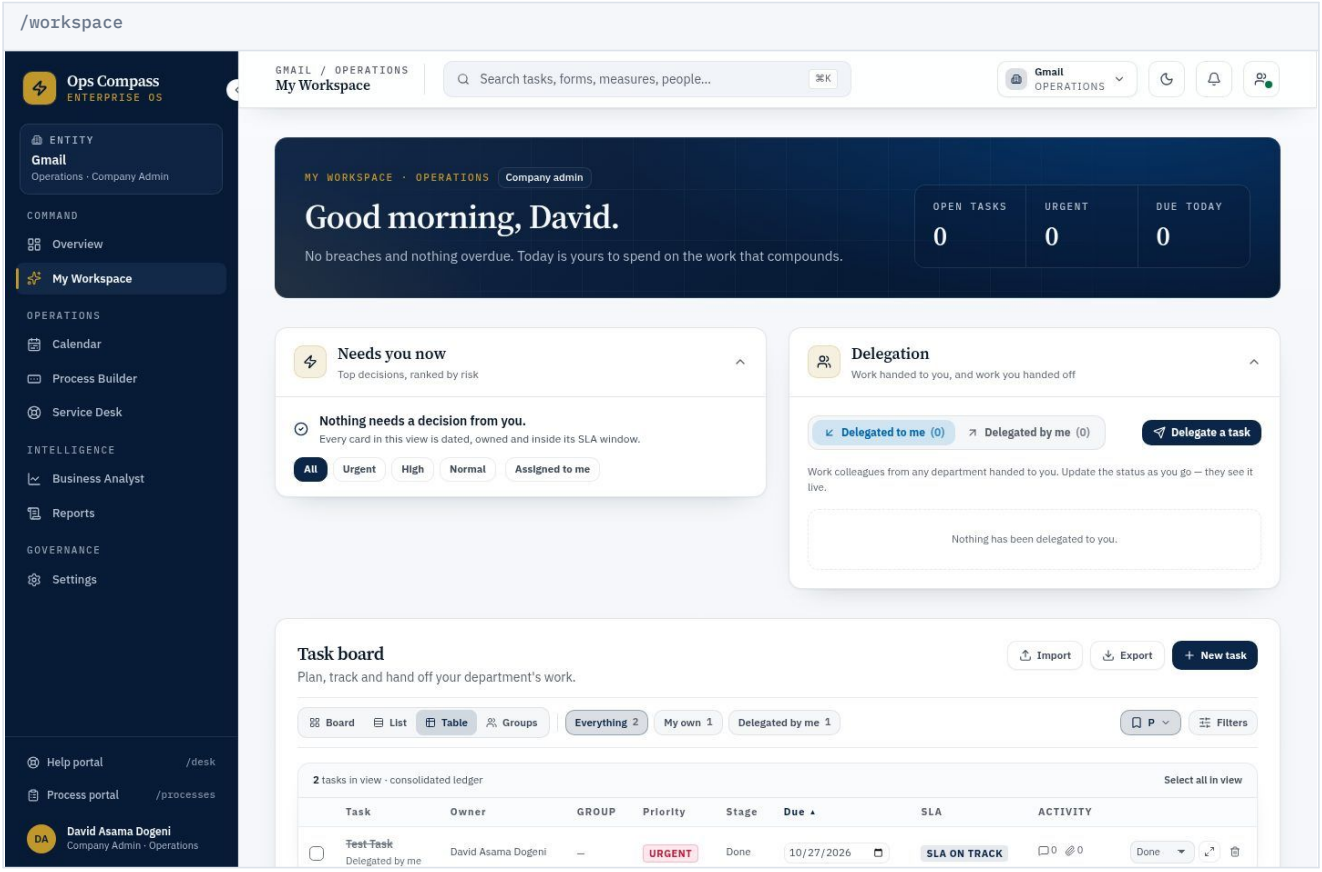
Guests only see tasks assigned to them or in a group shared with them, and can act within the scopes they were given (tasks, comments, forms, workflows, files, service desk).

OVERVIEW & WORKSPACE

Delegating work across departments

Hand a task to anyone in the company, and follow what was delegated to you and by you in separate tabs.

For: Team member, Builder, Department admin, Company admin · **Where:** My Workspace › Delegation · 1 min read



Two tabs, two directions

TAB	SHOWS	WHAT YOU DO
Delegated to me (blue)	Work colleagues from any department handed to you	Update the status as you go — the person who delegated sees it live.
Delegated by me (violet)	Work you handed to others	Follow progress, nudge or withdraw the delegation.

Delegate a task

1. In the Delegation card select Delegate a task.
2. Pick the colleague. The list covers the whole company, grouped by department.
3. Describe the work, set a priority and due date, and add context.
4. Send. The task appears in their “Delegated to me” tab and in your “Delegated by me” tab.

Good to know
Delegations are saved on the server and refresh about every 20 seconds. External collaborators cannot delegate.

CHAPTER 3

Operations

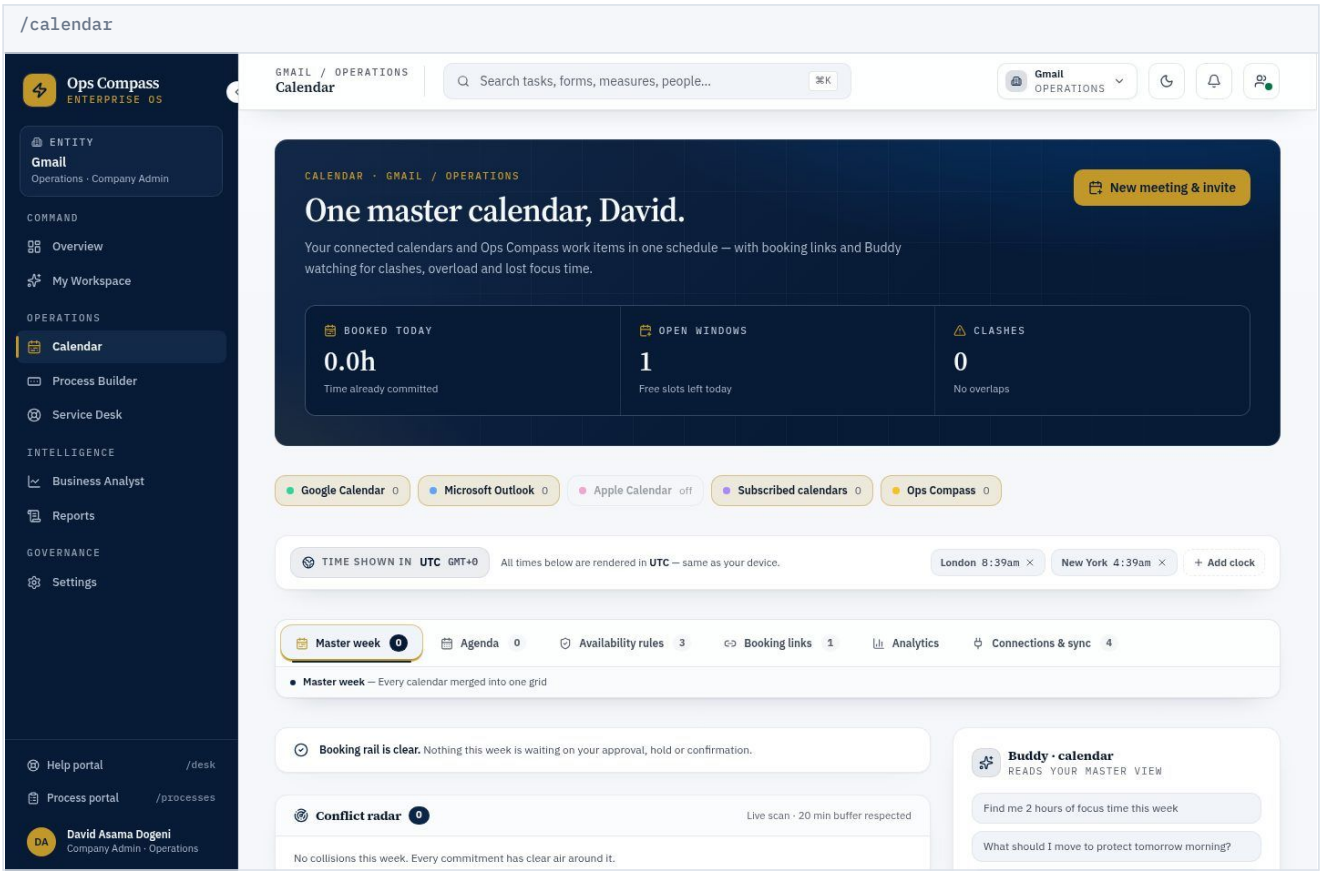
Calendar, checklists and digital processes.

OPERATIONS

Calendar: one master schedule

Plan meetings, save your schedule, prepare discussion agendas and turn Buddy summaries into reviewed follow-up work.

For: Team member, Builder, Department admin, Company admin · **Where:** Sidebar › Operations › Calendar · 10 min read



The seven calendar views

TAB	WHAT IT IS FOR
Master week	Every calendar merged into one grid, with the Conflict radar for overlaps.
Agenda	A chronological run of your day.
Availability rules	Working hours, buffers and protected focus time.
Booking links	Shareable slots for people outside the company.
Analytics	Where the week actually went: meeting load, focus time, longest clear run.
Connections & sync	Calendar subscriptions and sync activity.

TAB	WHAT IT IS FOR
Meeting notes	Invite Buddy, keep private minutes and review AI summaries and proposed work.

Header numbers

- Booked today — time already committed.
- Open windows — free slots left today.
- Clashes — overlapping commitments.

The Executive booking rail

Above the Master week and Agenda, the booking rail lists what needs your call in the next seven days: visitor bookings you haven't decided on, items that clash, meetings with guests who haven't replied, and anything you put on hold. The most urgent comes first.

BUTTON	WHAT IT DOES
Approve	You're happy for it to go ahead. It leaves the rail unless it still clashes or guests haven't replied.
Hold	Keeps the slot while you decide. It stays on the rail, marked On hold.
Confirm	Locks it in. It leaves the rail unless it still clashes or guests haven't replied.
Reschedule	Offers three clash-free times inside your working hours and buffers. A visitor's booking moves for them too, and a Google or Outlook event moves in that calendar.

Good to know

- Your choices are saved to your account and follow you to any device.
- Click a lit button again, or Undo in the message that appears, to take a choice back.
- Items from subscribed calendar links and Ops Compass tasks show Read-only. Move those where they were created.
- Click the rail's title to fold it to one line. It stays folded on that device until you open it again.

Schedule and run a secure video meeting

1. Select New meeting and switch on OpsCompass Meeting.
2. Add a title, date, time and agenda. Add each colleague or external guest by email; a room supports up to eight people including the host.
3. Select Create video meeting. Each guest is emailed their own private link with a calendar file attached; the screen shows “Invitation emailed” beside each person. If an email couldn't be sent, copy that person's link and share it with them only.
4. Open the meeting from its calendar event or private link. Guests enter their name; they do not need an Ops Compass account. The room opens 30 minutes before the start.
5. In the room, use Mute, Camera off, Share screen and People. Leave closes only your own session; the host can choose End for all.

> **Important**
> Each guest link is a private access key. If one is shared too widely, the host can replace its link from the calendar event — the guest is emailed the new link and the old one stops working. The secure media relay must be configured before live calls can join; saving a room does not prove that audio or video is ready. Ask your platform administrator to complete a real host-and-guest call test.

Tip
Select the globe button at the right of the calendar views to choose which time zone the calendar is shown in and to add world clocks, so international meetings land at sensible hours. The button turns gold when you're viewing a zone other than your device's.

Buddy meeting notes, summaries and follow-up work

1. Open Calendar -> Meeting notes -> Invite Buddy and select a meeting you host. Buddy uses your first name followed by Buddyai and waits for admission; an invitation alone never enables listening.
2. Before the meeting, open its Agenda view. Add discussion points, key questions and desired outcomes, optional presenters and minute budgets. Move points up or down to set the running order, then Save agenda. The agenda is private to you and is saved with the meeting notes, not just on this device.
3. Save agenda or Save notes before refreshing the browser. Calendar returns to the same view, meeting and notes tab with the saved content. A refresh with unsaved edits shows your browser's leave-page warning; cancel it and save first. Ordinary events saved to the Ops Compass calendar also reopen from your account. Google or Outlook events require a connected calendar before saving there.
4. Join the live room and choose Admit Buddy. Each active attendee must explicitly consent to audio recording and AI processing. Only the host can start audio notes; rejection, removal, withdrawn consent or an unconsented new arrival pauses capture.
5. Keep the host's browser open. Buddy records the audio received by that window in short segments, saves it privately and transcribes it. Choose Stop & save before leaving. Video is not recorded.
6. To replay later, open the meeting in Meeting notes -> Recording & transcript. Choose Play from beginning for consecutive playback, or Play beside a transcript part to jump to it. Use the audio controls to pause or seek, the arrows to move between parts and Speed to adjust playback. Timestamps count saved audio, excluding recording pauses. Audio and transcripts reload from your account; transcription failure does not remove the audio. Retry audio renews a private playback link if it expires.
7. In Meeting notes, open the meeting. Add or correct Written notes, then Generate summary. Review decisions, risks, open questions and the original transcript; the summary is saved to your account and survives reload.
8. The Summary view brings the complete meeting record together: executive minutes, saved agenda points and coverage, created tasks and their current status, proposals awaiting review, written notes, audio playback and timestamped transcript. Edit agenda or Edit notes opens the corresponding editor; Review proposal lets you confirm work before creating it. Empty sections show what has not been saved rather than inventing meeting content.
9. Summary -> Agenda coverage reviews each planned point in order: Covered, Partially covered or Missed. Addressed points include a discussion quote and outcome; missing evidence is marked Missed, not assumed discussed. Partial points identify remaining gaps. The agenda itself is never treated as evidence. After changing the agenda or notes, Refresh summary to update coverage; the previous summary keeps its original agenda snapshot.
10. Open Proposed work. Every task, focus group or ticket suggestion includes evidence from the notes. Review and edit the title, background, department, owner, members and due date before creating anything. Group creation requires existing group-manager permission.
11. Create & assign task saves to the selected staff member's Workspace. Create focus group uses existing membership controls. Service Desk suggestions open the normal cross-department request form with meeting context for your review and submission; nothing is submitted automatically.
12. My Workspace -> Meeting follow-ups shows your private summaries, proposals awaiting review and links to saved tasks, groups and requests. Task and request statuses refresh every 30 seconds; resolved requests still need requester confirmation. Open summary returns to the exact Calendar meeting record.

13. In Calendar, open a meeting you host and choose Meeting summary & follow-ups. After submitting a suggested request, its unique ticket number is linked back to the meeting. Keep the meeting and proposal references in the request description. If linking fails after submission, use Retry meeting link rather than raising another request. Reviewed work remains linked even if you regenerate the summary.

Important
In Ops Compass rooms, Buddy is a disclosed host-browser AI assistant. For Microsoft Teams meetings, see “Buddy in Microsoft Teams” below; Google Meet and Zoom are not supported. Live capture in Ops Compass rooms requires the existing secure video relay to be configured. Notes, transcripts and audio are private to the meeting host; reviewed work shares only the details you approve through the destination module. AI suggestions are not commitments. Previously saved recordings remain after consent is withdrawn.

Save your calendar and reopen after a refresh

1. Create an ordinary meeting, focus block or personal entry in your Ops Compass calendar. Complete the save and check that no error is shown before leaving the page.
2. Refresh the browser. Saved Ops Compass entries are loaded from your account, with their original dates and times. Calendar also reopens your selected view and week.
3. For Meeting notes, select Save agenda or Save notes before refreshing. The same meeting and active notes tab reopen with the last saved content.
4. If the browser warns about unsaved notes or agenda edits, cancel leaving, save and try again. If a save reports that the record changed elsewhere, reopen the latest record before reapplying your changes.

Good to know
A refresh in an existing tab is not the same as closing the browser. Unremembered sessions still expire after 30 minutes without activity. Saved work remains on your account even when you need to sign in again. A provider event saves to Google or Microsoft only when that connected service accepts it; this is not offline calendar editing.

Build a meeting agenda and review coverage

1. Open Meeting notes and select a meeting you host. Choose Agenda and add each discussion point with its title, preparation details, optional presenter and minute budget.
2. Use the arrows to set the order, edit or remove points, then choose Save agenda. Preparing an agenda does not start a recording or invite anyone automatically.
3. After the discussion, save Written notes or use a consented transcript, then Generate summary. An agenda alone cannot produce discussion minutes.
4. In Summary, review Agenda coverage alongside decisions, risks and open questions. Covered and Partially covered points include quoted discussion evidence; Missed means no supported coverage was found in the supplied notes or transcript.
5. Correct incomplete Written notes where needed, save and choose Refresh summary. Changing the agenda or notes makes the previous summary out of date; it retains the agenda snapshot used when it was generated.

Tip
Missed does not prove nobody spoke about a point: it means the available notes or transcript do not support coverage. Review the evidence before relying on the summary. Meeting notes, agenda and recordings remain private to the host.

Follow meeting actions through Calendar and Workspace

PROPOSED WORK	WHAT TO REVIEW AND WHERE IT GOES
Task	Review the evidence, owner, department and due date, then create and assign it in Workspace.
Focus group	Review the purpose and suggested members. Creation uses your existing group-management permission.
Service Desk request	Review the background in the normal request form and submit. Its unique ticket number links back to the meeting; requester confirmation is still required before closure.

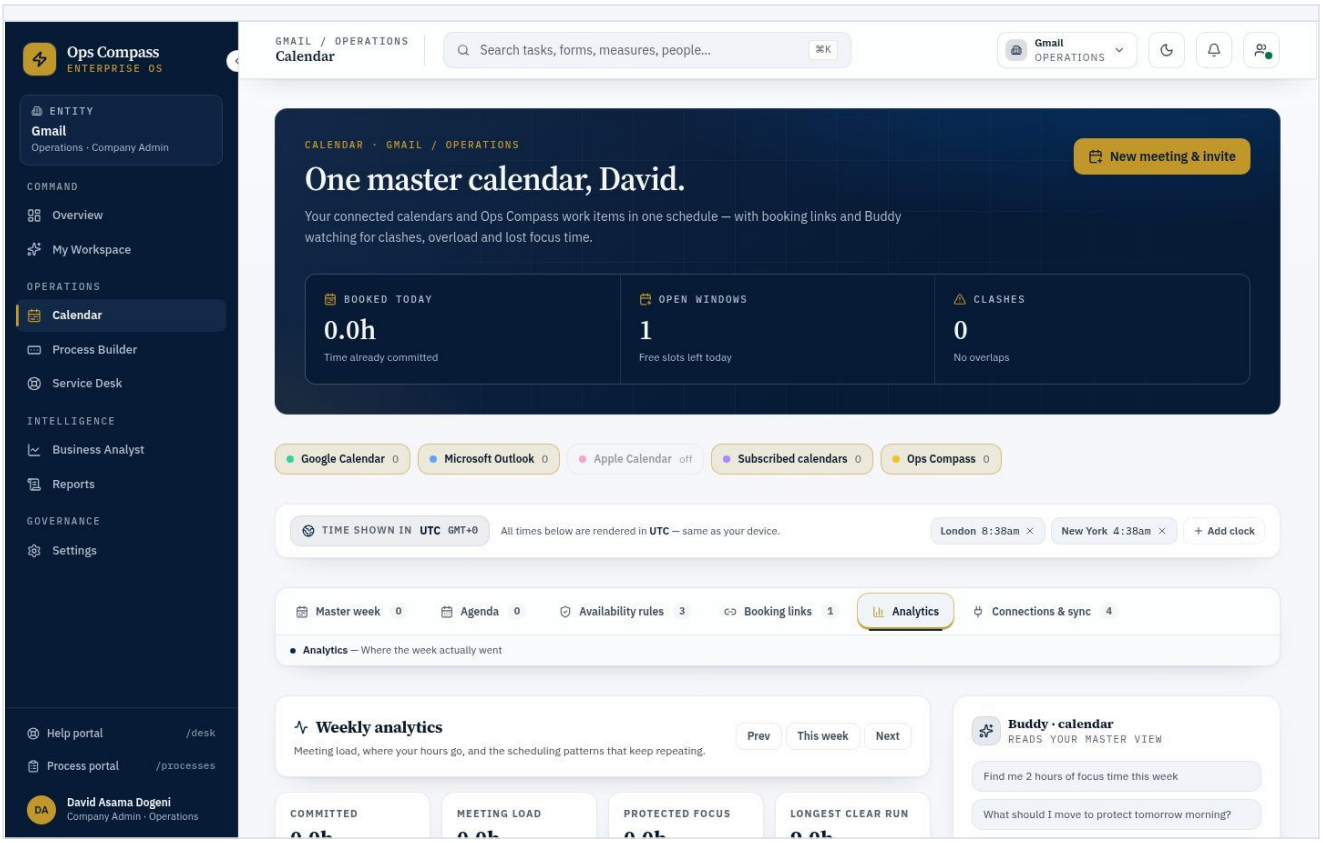
My Workspace -> Meeting follow-ups shows your private meeting summaries, pending proposals and links to reviewed work. Task and ticket status refresh every 30 seconds. Open summary returns to the exact Calendar meeting; a hosted calendar event also offers Meeting summary & follow-ups. Created work remains linked after summary regeneration. If a ticket saved but its meeting link failed, use Retry meeting link instead of submitting a duplicate.

Buddy in Microsoft Teams

1. Create the meeting in the Ops Compass calendar (this holds the title, time and agenda), open its prep page and select Invite Buddy.
2. In “Meeting in Microsoft Teams?”, paste the Teams join link from the Teams invitation.
3. Tick the box confirming you've told attendees the meeting will be recorded and transcribed, then select Send Buddy to Teams. If the meeting is more than ten minutes away, Buddy is scheduled and asks to join a minute before the start.
4. In Teams, admit Buddy from the lobby. It posts a recording notice in the meeting chat. The prep page shows its status: waiting in the lobby, in the meeting, ended.
5. Shortly after the meeting ends, the transcript appears in Meeting notes -> Transcript. Generate the summary and review follow-ups as usual.

> **Important**
> Buddy joins Teams through Recall.ai, a meeting-bot service your administrator approved (data processed in the US East region). Only the transcript is kept in Ops Compass: no audio is stored, and the recording is deleted from Recall once the transcript is saved. Remove Buddy from Teams at any time from the prep page; if anyone objects to recording, remove it straight away. Teams channel meetings and tenants that block external participants or meeting chat are not supported.

Weekly analytics



Analytics shows committed time, meeting load, protected focus and the longest clear run.

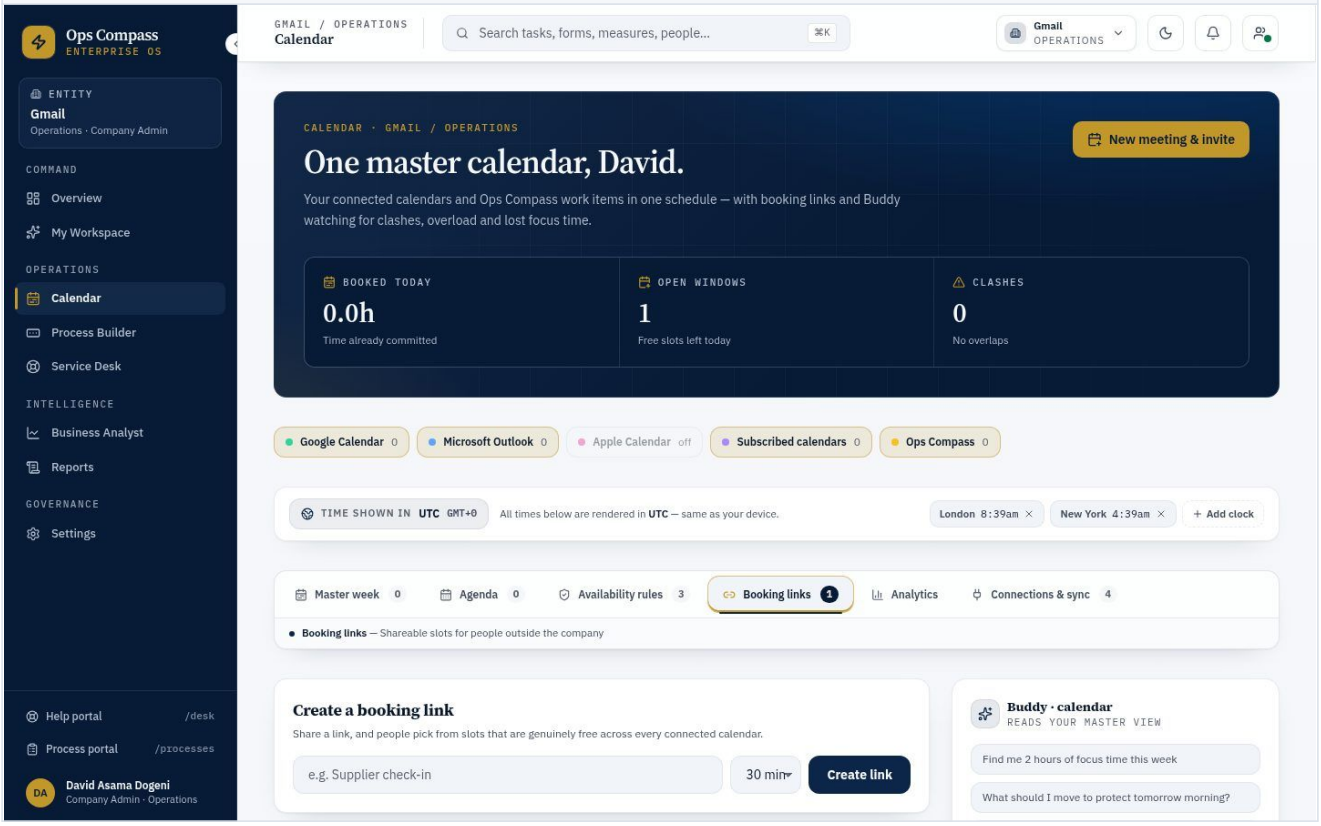
OPERATIONS

Availability rules and booking links

Set working hours and buffers, then share booking links so visitors can pick genuinely free slots.

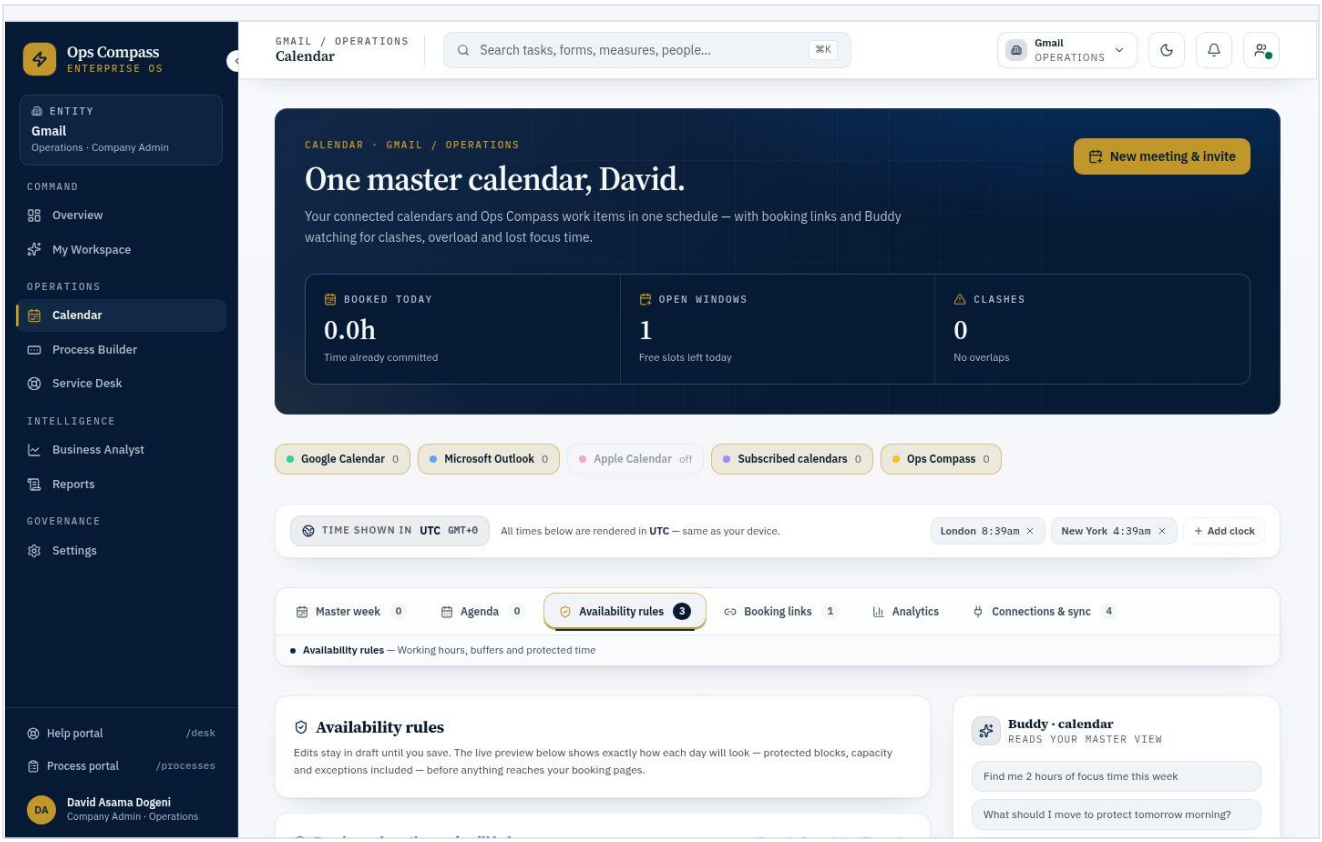
For: Team member, Builder, Department admin, Company admin · **Where:** Calendar › Availability rules / Booking links · 1 min read

/calendar



Availability rules

Rules decide which times are offered on your booking links: working days and hours, buffers before and after meetings, daily capacity and protected blocks. Edits stay in draft until you save; the live preview shows exactly how each day will look.



Edit rules in draft and check the preview before saving.

Create a booking link

1. Open Booking links.
2. Name the link (for example “Supplier check-in”) and choose the meeting length.
3. Select Create link, then copy and share it.
4. When a visitor books, the appointment is saved and appears on your calendar. The visitor receives a private link to reschedule or cancel.

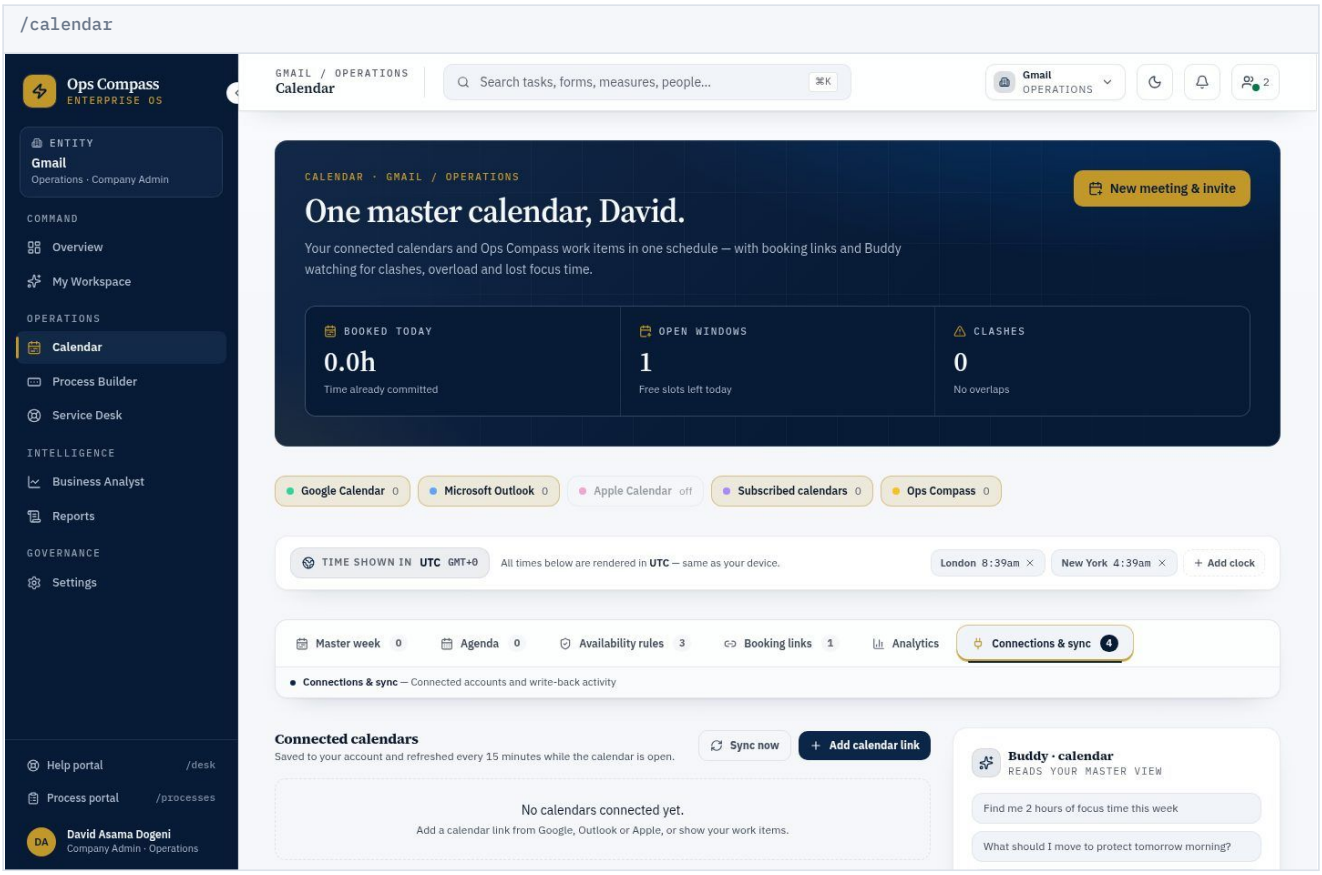
Good to know
Only slots that are free across every connected calendar are offered. Deactivated links show a polite “not available” page without revealing your details.

OPERATIONS

Connecting calendars

Subscribe to calendar feed links and show your Ops Compass work items on the calendar.

For: Team member, Builder, Department admin, Company admin · **Where:** Calendar › Connections & sync · 1 min read



Add a calendar link

1. In Google Calendar, Outlook or Apple Calendar, copy the calendar's private or public address ending in .ics.
2. In Ops Compass open Connections & sync and select Add calendar link.
3. Paste the address, give it a name and save.
4. Events appear in the Master week. Calendars refresh when you open the page, every 15 minutes while it is open, or when you select Sync now.

> **Important**
> A calendar link is like a key — anyone with it can read that calendar. Links are stored privately on your account and fetched by the server, never shared with colleagues.

Google and Microsoft two-way sync

Direct Google Calendar and Microsoft 365 sign-in (which lets Ops Compass write events back) appears once your administrator completes the one-time set-up. Until then the buttons are shown as unavailable and calendar links work as described above.

OPERATIONS

Checklists: repeatable routines with evidence

Author checklist templates, run them with pass, fail or N/A answers and capture photo, signature or file evidence.

For: Team member, Builder, Department admin, Company admin · **Where:** Sidebar › Operations › Checklists · 1 min read

Templates and runs

A template is the master list of checks for a routine — an opening inspection, a safety walk, a month-end close. A run is one completion of that template, by a person, at a time, with its answers and evidence.

Header numbers

- Templates and areas covered
- Average pass rate across published versions
- Runs recorded
- Exceptions raised

Author a template (Builders and admins)

1. Create a new template and give it an area and a name.
2. Add each check. For each one choose the evidence required: Photo, Signature, Attach (file) or No evidence.
3. Mark checks that must raise an exception when failed.
4. Publish. Admins publish; Builders prepare drafts. Changing a published template creates a new version, so past runs keep their original wording.

Run a checklist

1. Open the template and start a run.
2. Answer each check Pass, Fail or N/A and add the evidence asked for.
3. Add a note to any failed check. Failed critical checks raise an exception for follow-up.
4. Submit. The run is time-stamped and written to the audit trail.

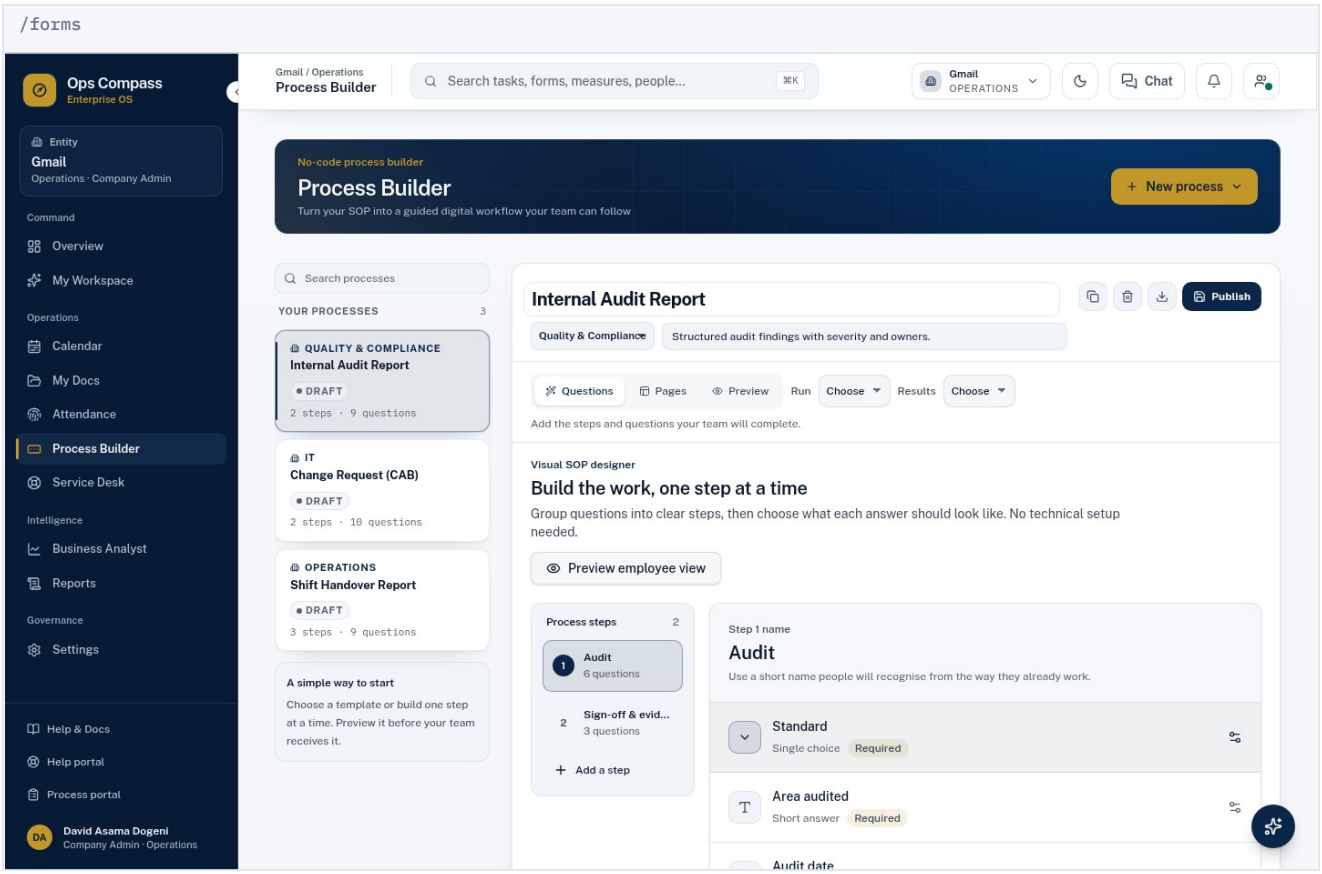
> **Good to know**
> If Checklists is missing from your menu, your administrator has not enabled the module for you.

OPERATIONS

Process Builder: turn SOPs into digital processes

Digitise an SOP one step at a time with a visual question palette, simple settings, preview and publishing.

For: Builder, Department admin, Company admin · **Where:** Sidebar › Operations › Process Builder · 2 min read



The workbench

Open Process library to search and switch between processes on any device. The wider workspace is organised into Design, Workflow & access and Results:

GROUP	TABS	PURPOSE
Design	Questions, Pages, Preview	Add process steps and questions, arrange employee pages and test the experience.
Workflow & access	Approvals, Reminders, Sharing	Set approval stages, reminders and alerts, and who may use the process.
Results	Responses, Insights, Dashboard	Review answers, trends and measures built on the answers.

Create a process

NEW PROCESS OPTION	WHEN TO USE
Use an SOP template	Start from a ready-made template (handover, audit report, change request, purchase requisition…).
Describe your process	Explain the work in plain language or paste an SOP; AI drafts the steps and questions.
Import an existing document	Bring an Excel, CSV or procedure document into the guided setup.
Start from scratch	Add your own steps and questions in the visual builder.

Field types

- Short answer, long answer, number and date
- Single choice, multiple choices and confirmation checkbox
- Rating, signature, file upload and photo
- Validation: minimum / maximum, length limits and patterns

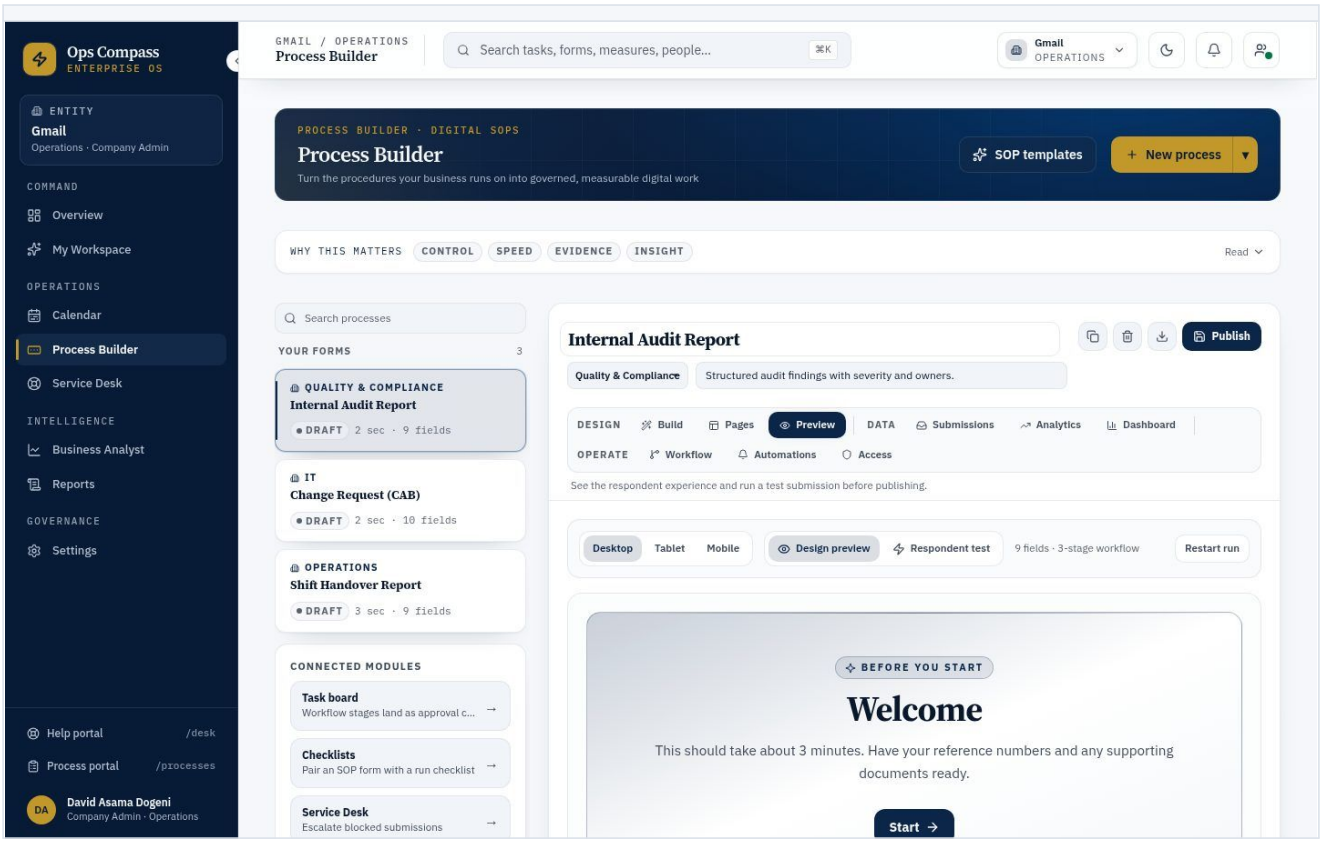
Build an SOP without code

1. Name the process, explain its purpose and give the first step a familiar name such as Request details or Safety checks.
2. Select Add question and choose an answer type from the question dialog.
3. Select a question to expand its settings directly below it. Write the question or instruction and tick Required answer when needed.
4. For single or multiple choices, enter one choice per line. Use the arrows to reorder questions, or duplicate and delete them from the same panel.
5. Select Add step for the next part of the SOP. Use the step arrows to change order. Deleting a step asks you to confirm before removing its questions.
6. Select Preview process to try the result, then Workflow & access or Set up approvals to choose the review path.

> **Tip**
> Changes save automatically. Nothing reaches employees until you publish the process.

Preview and publish

1. Open Preview and switch between Desktop, Tablet and Mobile.
2. Use Respondent test to run a complete test submission.
3. Select Publish. The process appears in the Process portal for everyone allowed by its Access settings.
4. Use Copy link to share it directly.



Preview the respondent experience on desktop, tablet and mobile.

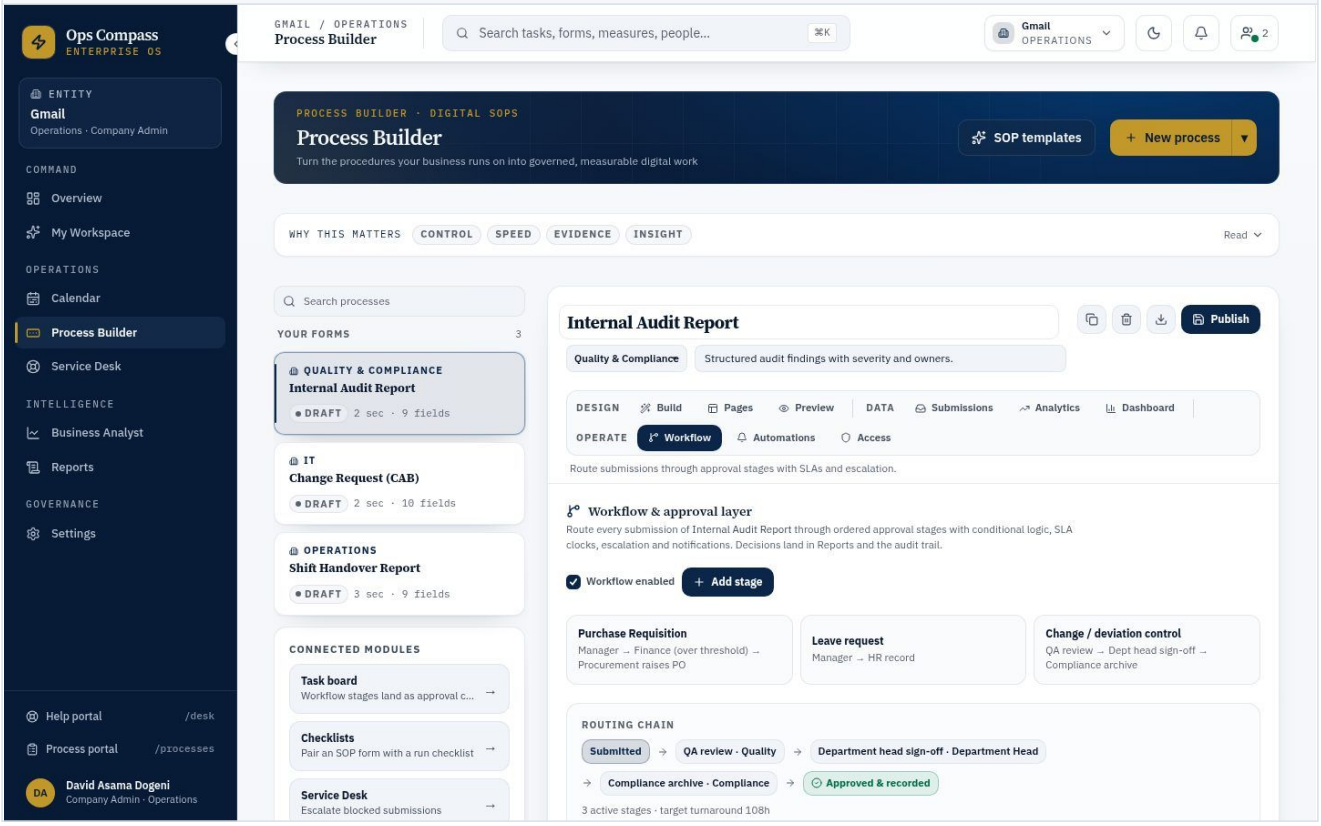
OPERATIONS

Workflows, automations and access

Route submissions through approval stages with SLAs, fire reminders and escalations, and control who can use each form.

For: Builder, Department admin, Company admin · **Where:** Process Builder › Run · 1 min read

/forms



Approval workflow

1. Open Run › Approvals and tick “Workflow enabled”.
2. Select Add stage for each approval step (for example Quality review, then Department head sign-off).
3. For each stage set the approver, a target turnaround and any condition (for example only when an amount exceeds a threshold).
4. The routing chain shows the path from Submitted to Approved & recorded. Decisions land in the task board and the audit trail.

Automations

TRIGGER	EXAMPLE
On submit	Notify the quality lead whenever a report is submitted.
Field threshold	Escalate when “Downtime (minutes)” is above 60.
Not submitted by	Remind the shift lead if the handover is missing by 18:00.
Overdue	Escalate approvals that miss their turnaround.

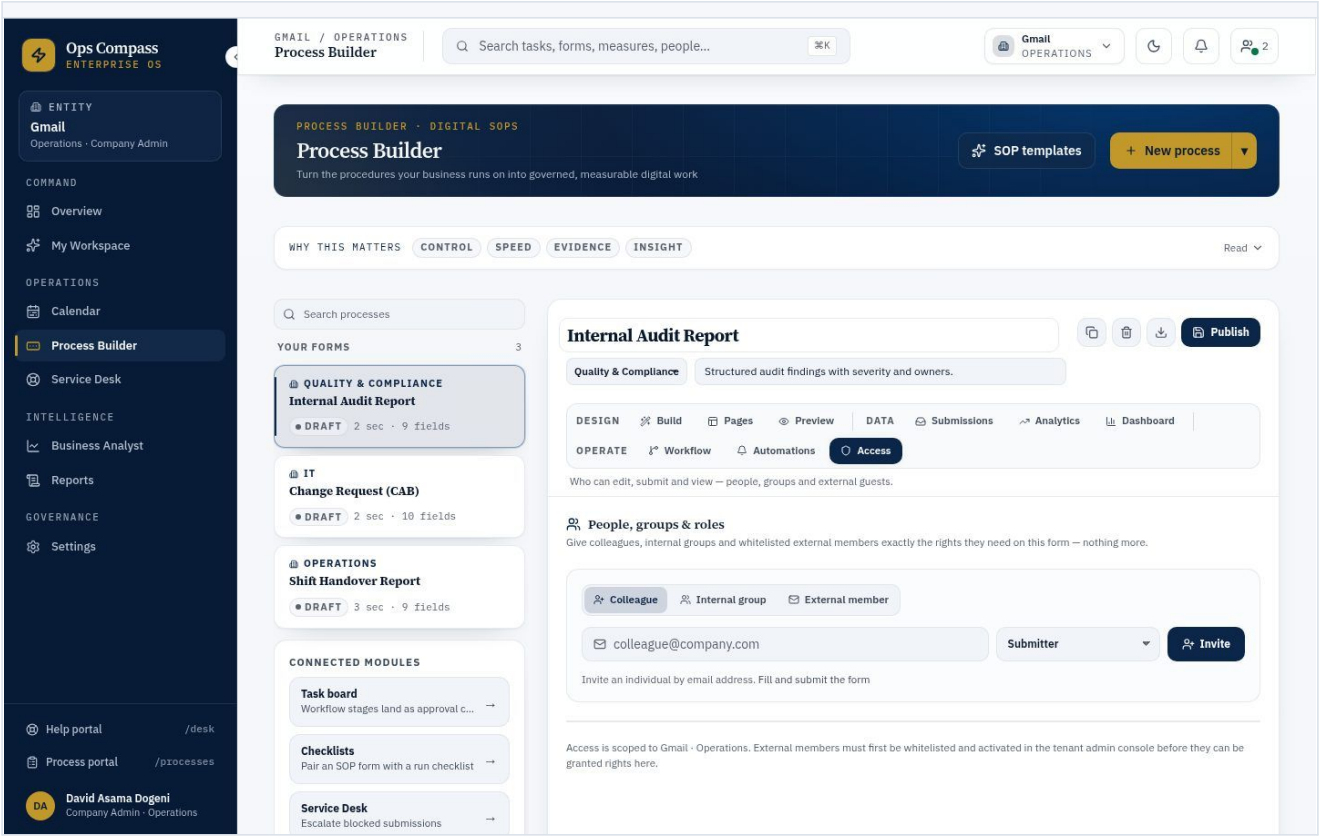
Each automation can notify, email, remind or escalate, in the app or by email.

Access

RIGHT	CAN
Owner	Everything, including deleting the process and changing access.

RIGHT	CAN
Editor	Change the design, workflow and automations.
Submitter	Fill in and submit the form.
Viewer	Read submissions without changing them.

Give rights to colleagues, internal groups or whitelisted external members. Each person gets only the rights you grant.



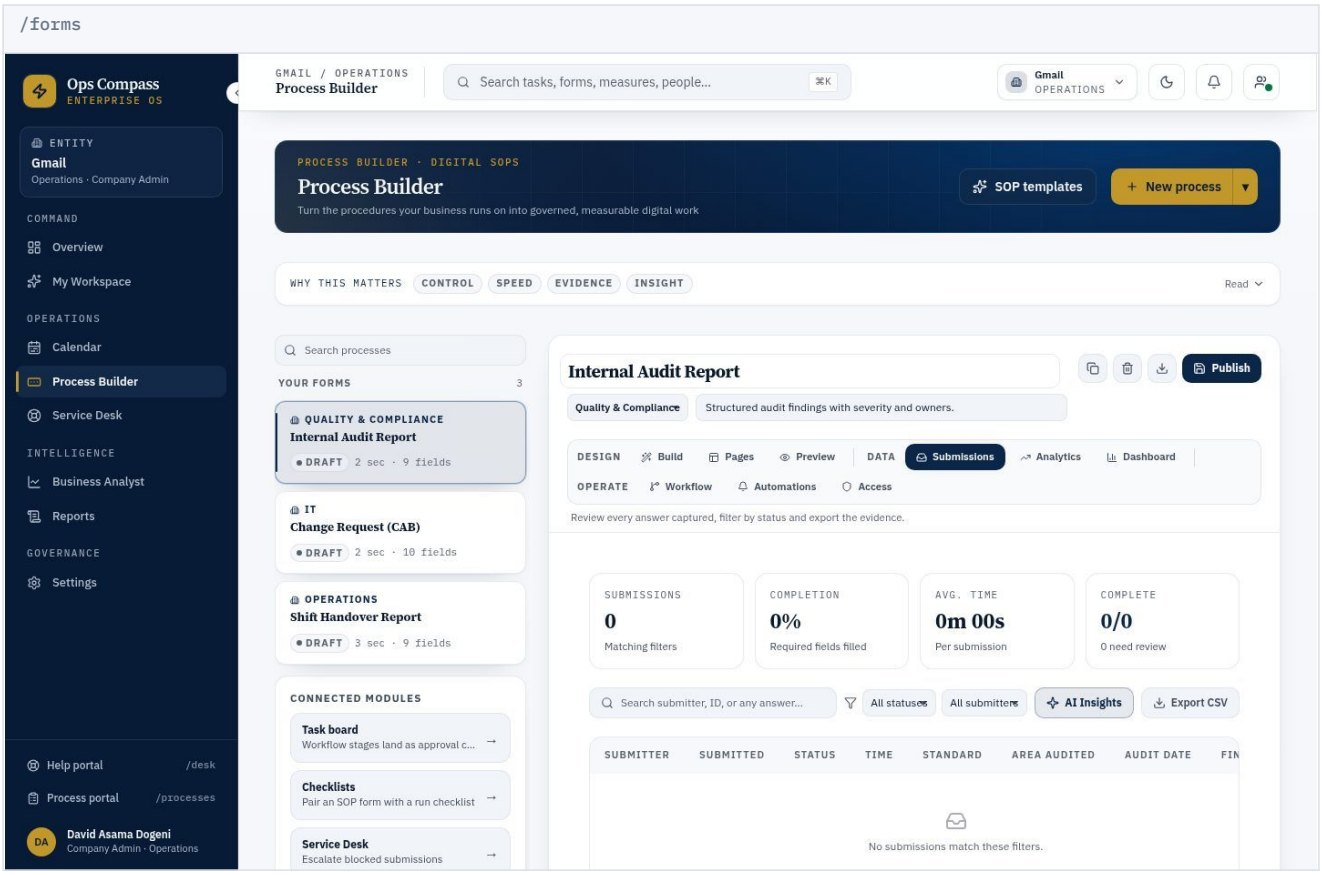
Access: invite colleagues, groups or external members with a specific right.

OPERATIONS

Submissions, analytics and form dashboards

Review every answer, filter and export evidence, and build widgets that turn answers into numbers.

For: Builder, Department admin, Company admin · **Where:** Process Builder › Results · 1 min read



Submissions

- Header: number of submissions, completion rate, average time and how many need review.
- Search by submitter, ID or any answer; filter by status and submitter.
- AI Insights summarises patterns across answers.
- Export CSV downloads the filtered evidence.

Analytics and Dashboard

Analytics shows submission trends, completion and on-time rates. Dashboard lets you add widgets: KPI count, average, sum, min or max of a number or rating field; bar and pie charts for choice fields; trend lines; and a recent-values table.

> **Tip**
> Everyone in the department can also build personal KPIs and dashboards from published processes in the Process portal.

OPERATIONS

My Docs: documents from Microsoft 365, Google Drive and Zoho

Create and co-edit Compass files, connect Microsoft 365, Google Drive and Zoho, link Workspace work, generate management reports and control document access.

For: Team member, Builder, Department admin, Company admin · **Where:** Sidebar › My Docs · 9 min read

Connect your services

1. Open My Docs from the sidebar.
2. Choose Connect on Microsoft 365, Google Drive or Zoho WorkDrive and sign in with your work account.
3. Connect more services any time with Connections at the top of the page.

> **Good to know**
> You only ever see what that service already lets you see. Its own sharing and permission rules still apply.

Work on files

- Ops Compass files — create a Compass Doc, Sheet or Slides with no outside account: formatting, pictures, formulas, charts, CSV import/export, presenting and print to PDF. New files and folders are private until the owner shares them.
- Continue where you left off — your last six files across every service, one click to reopen.
- Edit live — opens the file in Office, Google or Zoho; changes save to the original file and the panel refreshes when anyone saves.
- New — creates a document, spreadsheet, presentation or folder where you are.
- Upload new version — replaces the file and keeps the service's version history.
- Change log — everything done through Ops Compass on your files and the files you protect.

Build and present with Compass Slides

1. Choose Ops Compass files -> New file -> Compass Slides.
2. Edit the title and content beneath the slide preview. Choose a layout and Paper, Boardroom or Signal theme.
3. Add a picture and description, or use Bullet points. Add speaker notes for your delivery.
4. Use the slide strip to select a slide. Duplicate, move earlier/later, or delete slides with the toolbar. Undo and redo recent edits while the file stays open.
5. Wait for Saved before closing. Your layouts, notes and pictures save with the file and return when you reopen it.
6. Choose Present. Move with the previous/next controls or arrow keys; Home and End jump to the first and last slide. Use the notes icon only when notes can safely be visible to your audience.
7. Use Print / PDF for an audience copy; speaker notes are excluded and existing owner-consent and watermark rules still apply.

> **Good to know**
> Compass Slides uses structured layouts, not a free-positioning PowerPoint canvas. Imported PowerPoint files are converted copies; animations, embedded charts and exact Office formatting are not preserved.

1. Choose Templates for an Executive review, Decision proposal or Project update. Preview the sections, then Insert slides; your existing slides are retained. Replace the prompts with real business information.
2. Choose From outline to turn notes into a deck. Start each slide with a # heading and place its content underneath, then Insert slides.
3. Use Find a slide to search titles, content and speaker notes. Select a theme and Apply theme to deck for a consistent look; Undo reverses the change.
4. In Present, use the rehearsal timer to pause, resume or reset timing. Jump to slide opens a specific section. Blank audience screen hides the slide and notes during discussion; restore it with the same control.

Analyse data and create tables in Compass Sheet

1. Choose Ops Compass files -> New file -> Compass Sheet. Enter values in the formula bar or double-click a cell; Enter and Tab move to the next cell.
2. Enter a range such as A1:C6 in the range box and press Enter. Format the selection, inspect Count/Sum/Average, fill it with the first selected cell's value, or clear its values. Undo and Redo reverse recent sheet edits.
3. Copy tab-separated rows from Excel or another sheet, select the starting cell, focus the grid and paste. Pasting outside A1:Z100 is rejected rather than silently dropping rows.
4. Choose Create table, enter its name and data range, and confirm. The first row is the header. Use the table's search and sort controls, enable Totals to sum visible numeric rows, and edit the original cells through the table view. Removing a table keeps its data.
5. Select a data range with labels and numeric columns, then choose a Bar, Line or Pie chart. Change its title or chart type as needed.
6. Wait for Saved before leaving. Tables, formulas, formatting and charts return when the file reopens; collaborators use the existing file access controls.

Formulas support arithmetic, absolute references such as B2, SUM, AVERAGE, MIN, MAX, COUNT, IF, ROUND, COUNTIF, SUMIF and many standard functions. Errors propagate instead of being silently counted as zero. For example: =SUMIF(A2:A10,"Approved",B2:B10).

Good to know
Compass Sheet is a lightweight single-sheet tool bounded to 100 rows and 26 columns, not a complete Excel replacement. Table sorting and filtering are temporary views that preserve underlying cell addresses; saved table definitions and totals are shared, but each viewer's search/sort choices are local. Fill selection repeats a value or formula verbatim, not relative Excel autofill. Structured table references, pivot tables, VBA/macros, multi-sheet workbooks and full Excel formatting round-trip are not supported. CSV exports values only, without tables, formatting or charts.

Keep working during a Microsoft outage

1. Before an outage, open an important file under Connected files and select Prepare working copy. Read the conversion and protection limits, then Save working copy.
2. Review the converted file. It is a private Compass file with the captured source version and time; use Share to grant approved colleagues access, or move it into an appropriate Compass folder.
3. During an outage, open Ops Compass files -> Continuity copies. Continue editing, commenting and presenting; wait for Saved before closing. Native Compass files do not depend on Microsoft services.
4. When Microsoft returns, choose Check source recovery. If its version changed, compare the original and working copy before transferring approved edits manually. The original is never overwritten automatically.

Important
Prepare copies while the source is reachable: a file that exists only in Microsoft cannot be retrieved during its outage. Protected files are excluded. This is not an exact backup: macros, advanced formatting and some media are not preserved, and only the first worksheet is imported. Ops Compass, internet access and a working sign-in method are still required; this is not offline editing or Microsoft email/calendar failover.

If you already have an authorised local Word, Excel, PowerPoint or CSV copy, use Import in Ops Compass files during the outage. Review the converted result and share only with authorised colleagues. Download a Word/CSV copy or print an audience PDF when needed, subject to the Compass file's protection controls.

Co-edit, comment and connect Workspace tasks

1. Open a Compass file and choose Collaborate.
2. Watch colleague presence at the top; saved changes appear in other open sessions without a page refresh.
3. Use Comments for anchored feedback and @mentions. The owner and mentioned colleagues receive an Ops Compass alert.
4. Use Versions to see each named editor, a change summary and restore an earlier version as a new revision.
5. Use Tasks to link an accessible Workspace task, then Insert task & activity to place its exact task ID, owner, status, group, due date and recent activity in the document, sheet or slide.

Good to know
If two people save at once, revision checking stops the older tab overwriting the newer work. Load the latest version, then reapply any unsaved change. The latest 60 versions are kept.

Generate and refresh a management report

1. In the document library, choose Management report.
2. Select My Workspace, Service Desk, or both, then a 7, 30 or 90-day period and one of your folders.
3. Create the editable Compass Doc. Review the executive summary, workload or SLA tables and management-attention items.
4. Open Collaborate and choose Refresh report to replace its figures with current authorised records; use Print / PDF for a board-ready copy.

Good to know
Reports contain only tasks and Service Desk queues you are authorised to read. They are private by default and never invent missing figures.

Send files to colleagues and use them in other modules

- Send to colleagues — type @ to pick people from any department and add a note; they get an Ops Compass alert that opens the file.
- Attach from My Docs — the paperclip in task comments, service desk updates and chat inserts a file link that opens in My Docs.
- Copy Ops Compass link — paste a file anywhere in the product.
- Access — owners can grant Can view, Can comment or Can edit on a file or folder. Folder access flows to every Compass file inside; specific grants can be removed at any time.
- Company-wide viewing — an optional owner-controlled setting for files that every employee may read; it does not grant editing.

- Overview — the Documents card lists your recent and protected files with who last edited them, their protection level and pending approvals.

> **Tip**
> Colleagues open files with their own access. Use Share if they don't have access yet.

Protect confidential documents

1. Select a native or connected file or folder and choose Protect.
2. Pick Internal, Confidential or Restricted.
3. Keep Require my consent on so others must ask before they share, print or download through Ops Compass.
4. Keep Watermark on and, if you like, add your own watermark message (up to 120 characters).
5. For connected files, enable Apply available controls in the provider and review the returned status. Provider acceptance is not proof of full outside-app enforcement. Compass folders pass their protection to files inside.

SERVICE	WHAT LOCKING DOES THERE
Compass files	Owner approval controls actions inside Ops Compass. Watermarked downloads are saved-revision PDF copies for documents, sheets and slides.
Google Drive	Requests editor re-sharing and viewer copy/print/download restrictions when consent is enabled, and verifies the flags. This is not owner approval for every action; folder and shared-drive behavior needs separate provider policy.
Microsoft 365	Requests the mapped sensitivity label. Assignment is asynchronous; verify the label, its configured rights and licensing in Microsoft 365. A label alone does not guarantee the requested restrictions or owner message.
Zoho WorkDrive	This connection cannot apply equivalent outside-app controls; Ops Compass checks remain active.

Protected files are links only, whether native or connected. Downloads, printing, PDF export and editable conversion are blocked even for the owner and even with an earlier approval, because ordinary copies cannot retain access controls. Share through the file’s Access or Share controls; copying a link alone does not grant access. Requests for sharing appear in Consent and on your bell. Unprotected native files can still be exported as fixed-layout PDFs.

> **Protection after leaving Ops Compass**
> An ordinary PDF, printout or other downloaded copy cannot enforce future owner approval, prevent screenshots, or guarantee that its watermark cannot be removed. Provider watermarks and rights on live originals require the provider's own configured policy; Ops Compass does not rewrite those originals to insert owner messages. Use controlled access links when those guarantees are required. Removing Ops Compass protection leaves provider policies in place; review them in the source service.

OPERATIONS

Attendance: employees, People setup and clock-ins

Manage clock-in eligibility, existing app employees and attendance-only staff, with secure PIN setup and HR reporting.

For: Team member, Builder, Department admin, Company admin · **Where:** Attendance › HR management › Setup › People · 3 min read

Who manages employees?

PERSON	ACCESS
Company administrator	Manages all company attendance people, work hours, sites and rules.
Department administrator	Manages attendance people and views reports for their own departments. Cannot change company-wide rules.
Employee with an app account	Uses My attendance for their own clock-ins, history, PIN and face registration.
Attendance-only employee	Has no app account, password, workspace access or department membership. An authorized administrator opens their supervised clock station; the employee enters their private PIN.

Use the employees already onboarded

1. Open Attendance, select HR management, then Setup. People opens first.
2. Search by name, email or employee code, or filter by department and clock-in eligibility.
3. Select Manage beside an employee. Their name and account email come from the existing company directory.
4. Update the employee code, phone and attendance department. App employees can only use departments where they already have membership; use App accounts to invite staff or change app department assignments.
5. Enable Clock-in required for employees expected to clock in. Turn it off for exempt staff; they are not assigned scheduled absence days. They can finish an open shift but cannot start a new shift until re-enabled.
6. Disable Active for attendance when needed. Their history remains; their app access is not changed. Save employee.

Good to know
Current eligibility tags determine scheduled attendance figures. They do not rewrite saved clock events. Existing app employees default to clock-in required until an administrator changes their tag.

Add someone who does not need app access

1. In People, select Add employee. This creates an attendance-only employee, not an app account.
2. Enter their full name and a unique employee code, choose a department and optionally add email and phone.
3. Set Clock-in required and Active for attendance, then Save employee.

4. Select their key icon. Have the employee enter and repeat a non-repeated, non-sequential 4–6 digit PIN; select Save PIN. No existing PIN can be displayed.
5. If face checks are required, choose Register face with the employee's consent and capture their face on the device.
6. Open Clock station beside the employee. Let them enter their PIN and complete location/face checks, add any items, cash or note, then clock in or out.
7. Close the station and open Monthly report or Overview. Their verified clock events appear alongside app employees.

Important
Attendance-only clocks are supervised by an authorized administrator. There is no public PIN-only link or employee password. The station always requires the employee's PIN, even when company PIN checks are optional; saved events record the administrator who operated the station.

Password changes, PIN resets and details

- App employee: the security icon opens Password reset or Reset PIN. A password reset sends a link to the employee's account email; the employee chooses the password. HR cannot read it.
- An app employee changes their own PIN and face registration in My attendance. After HR resets their PIN, they set a new one there.
- Attendance-only employee: set a new PIN or face registration in People. No system password exists because no app account was created.
- Manage updates the app employee's name in the main directory. Account email is read-only here; attendance-only contact details are editable.
- Five incorrect PINs lock attendance for 15 minutes. HR can reset a forgotten PIN. Existing attendance records are preserved.
- To grant full app access, select App accounts and follow the normal company invitation process. Creating an attendance-only record does not automatically convert it into an app account.

Hours, reports and work sites

HR Overview, Monthly report and Live leaderboard update periodically and support employee drill-down. Recorded hours come from paired clock-in/out events, not browser-only data. Attendance-only employees use the same company work hours, time zone, work sites and checks. Company administrators open Setup › Work hours & sites to change those settings. Use recorded work time alongside task outcomes; hours alone are not a measure of productivity.

CHAPTER 4

Service Desk

Incidents, requests, SLAs and knowledge.

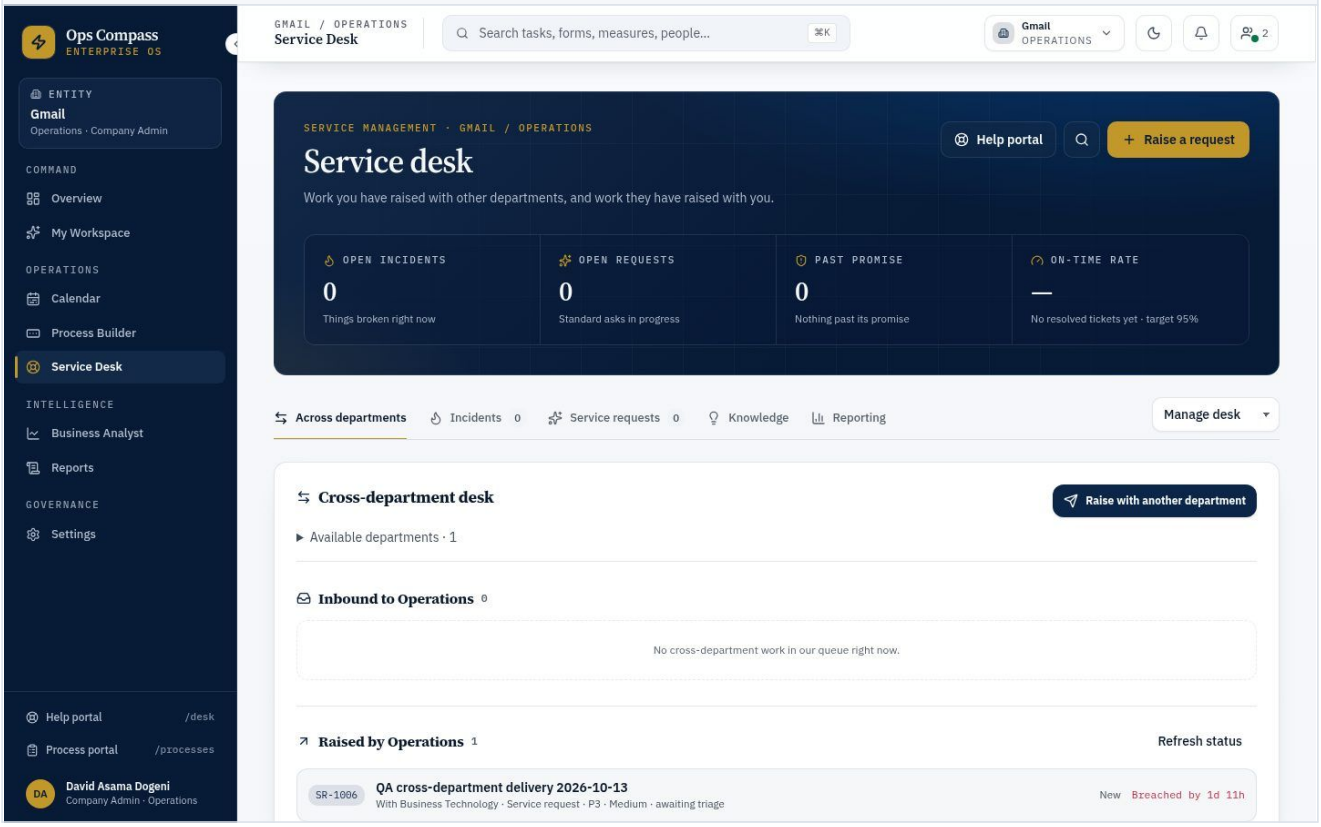
SERVICE DESK

Service Desk at a glance

How incidents and service requests flow, what the header numbers mean and which tabs each role sees.

For: Team member, Builder, Department admin, Company admin · **Where:** Sidebar › Operations › Service Desk · 1 min read

/service-desk



Incidents and service requests

TYPE	MEANS	EXAMPLE
Incident	Something is broken or degraded.	Card payments are failing at the till.
Service request	A standard ask from the catalogue.	New starter onboarding, access change.

Header numbers

- Open incidents — things broken right now.
- Open requests — standard asks in progress.
- Past promise — tickets that have missed their service level.
- On-time rate — resolved tickets that met their promise (a dash until something is resolved; the target is shown underneath).

Tabs

TAB	WHO SEES IT	PURPOSE
Across departments	Everyone	Work you raised with other departments and work they raised with you.
Incidents	Everyone	Things broken in this department, ranked by SLA risk.
Service requests	Everyone	Standard asks against your own catalogue.
Contributing	Everyone	Tickets a colleague brought you in on, in any department. You contribute; they stay the primary owner.
Knowledge	Everyone	Answers that solve problems before a ticket is raised.
Reporting	Anyone who can view reports	Desk performance against agreed service levels.
Manage desk menu	Department and company admins	Workload, Service catalogue, Categories, Request form, Templates, SLA & escalation and Operations.

> **Good to know**
> If you cannot change desk configuration, the Manage desk menu is hidden completely — and the server refuses configuration changes from anyone without administrative membership.

SERVICE DESK

Working tickets: priority, SLA clocks and statuses

How priority is set, how service-level clocks run, and how a ticket moves from New to Closed.

For: Team member, Builder, Department admin, Company admin · **Where:** Service Desk › Incidents / Service requests · 2 min read

Priority

When someone raises a ticket they answer two plain questions: how many people are affected and how badly it hurts. The priority matrix turns those answers into P1 · Critical, P2 · High, P3 · Medium or P4 · Low. Technicians can adjust it during triage.

PRIORITY	INCIDENT: FIRST RESPONSE / RESOLUTION	REQUEST: FIRST RESPONSE / RESOLUTION
P1 · Critical	15 min / 4 h	1 h / 8 h
P2 · High	30 min / 8 h	2 h / 1 day
P3 · Medium	2 h / 1 day	8 h / 2 days
P4 · Low	8 h / 3 days	1 day / 5 days

These are the starting targets; your department admin can change them under SLA & escalation.

Service-level clocks

- Every ticket carries a live response clock and a resolution clock.
- Clocks only run during the desk's business hours and skip configured holidays, unless the desk runs 24 × 7.
- Clocks pause while a ticket is On hold waiting for the requester.
- At the warning threshold the ticket turns amber (SLA at risk); past the target it is red (breached) and the escalation ladder starts.

Statuses

STATUS	MEANING
New	Raised, waiting for triage.
Awaiting approval	The catalogue item needs an approver first.
Assigned	Has an owner.
In progress	Being worked.
On hold	Waiting on the requester or a third party; clock paused. A written reason is required, and the requester can see it.
Resolved	The team says it is fixed. It now waits for the requester to confirm.
Closed	The requester confirmed the fix (or a declined request). Only the requester's sign-off closes a ticket.

Confirming a fix

1. The agent writes a resolution note, optionally attaches proof of work, and marks the ticket Resolved.
2. The requester sees "Waiting for your confirmation" in My requests (help portal), in their notifications and on the request page.
3. They choose Yes, it's fixed (with an optional rating) to close it, or No, it's not fixed with a reason to send it back — the clock restarts.
4. Agents cannot close a ticket themselves. If the requester has no account (an email or phone ticket), the agent records how they confirmed, for example "by phone, 27 Oct".

> **Tip**
> Turn a good resolution into a knowledge article so the next person can solve it themselves.

Bringing someone in with @mentions

In a ticket's update box, type @ (or select the @ button) and pick a colleague. You can mention anyone on this desk and anyone collaborating on the ticket. They get a “mentioned you” alert that opens the ticket. Mentions work in internal notes and in replies to the requester.

SERVICE DESK

Working a ticket as a team: primary owner and collaborators

Bring colleagues from any department onto one ticket number. They contribute; the primary owner stays accountable and is the only one who resolves it.

For: Team member, Builder, Department admin, Company admin · **Where:** Service Desk › open a ticket › Team on this ticket · 2 min read

Who does what

ROLE	CAN	CANNOT
Primary owner (the person the ticket is assigned to)	Brings people in and takes them off, works the ticket, replies to the requester, resolves it.	—
Collaborator (anyone in the company, any department)	Posts updates on their part, marks their part done or reopens it, reads the full history.	Change the status, priority or owner, write to the requester, resolve or close the ticket.
Desk manager (department or company admin)	Everything the owner can, so work keeps moving when the owner is away.	—

Good to know
These limits are enforced by the server, not just hidden on screen: whatever a collaborator's device sends, the ticket's status, owner and resolution stay as the owner left them.

Bring a colleague in (primary owner)

1. Open the ticket. Under Team on this ticket, select Bring in a collaborator.
2. Search anyone in the company by name or department and pick them.
3. Write their part of the work — for example "Check the firewall rules on the payroll server". Each person owns one clear part.
4. Select Bring in. They get a notification straight away, and the ticket appears on their Contributing tab.

A ticket can have up to 8 collaborators. Use the × beside a name to take someone off; their earlier updates stay on the record.

Contribute (collaborator)

1. Open Service Desk › Contributing, or select the notification that says you were brought in.
2. Read the description and history, then post updates on your part as you go. Updates are visible to the team, never to the requester. Type @ to mention the primary owner or another collaborator — they are alerted.
3. When your part is finished, write what you did and select Mark my part done. The owner is notified. Reopen your part if more is needed.

How contributions are recorded

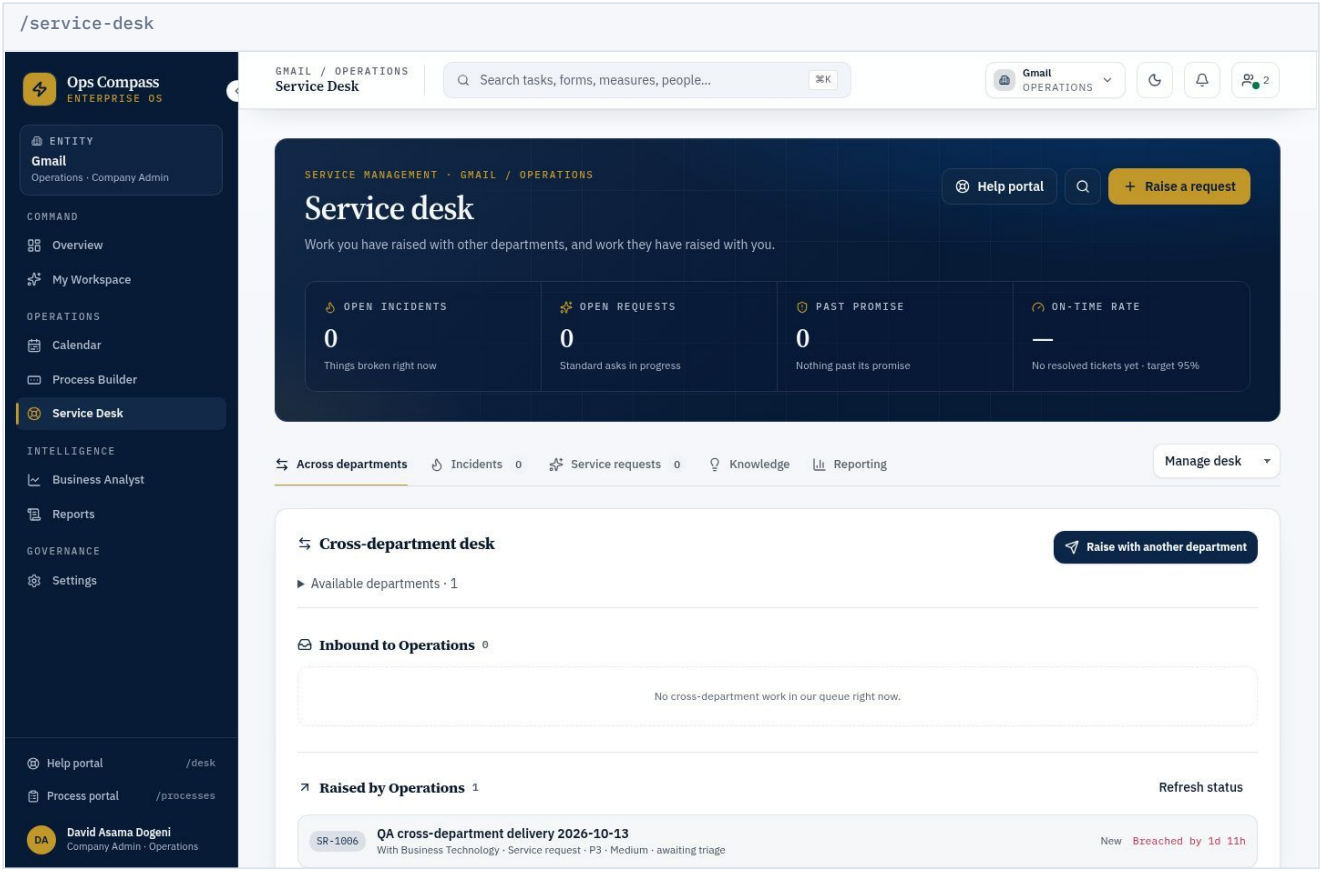
- Every update carries a gold Contribution label with the person's part, so it is never mistaken for the owner's own work.
- The activity timeline and audit trail record who was brought in, each contribution and each part completed.
- Reporting has a Contributions table: tickets each person helped on, parts done and updates posted — counted separately from tickets owned and resolved.
- If the owner resolves while a part is still open, the desk asks them to confirm first, and every collaborator is told the ticket was resolved.

SERVICE DESK

Raising work with another department

Send an incident or request to another department’s queue and follow it until it is resolved.

For: Team member, Builder, Department admin, Company admin · **Where:** Service Desk › Across departments · 1 min read



Raise with another department

1. Open Across departments and select Raise with another department (or use Raise a request in the Help portal and choose the department).
2. Pick the department, the type (incident or request), the category (and subcategory and item, where that department uses them) and answer its questions.
3. Submit. The ticket lands straight in the receiving department’s queue with its SLA clock running.

Follow it

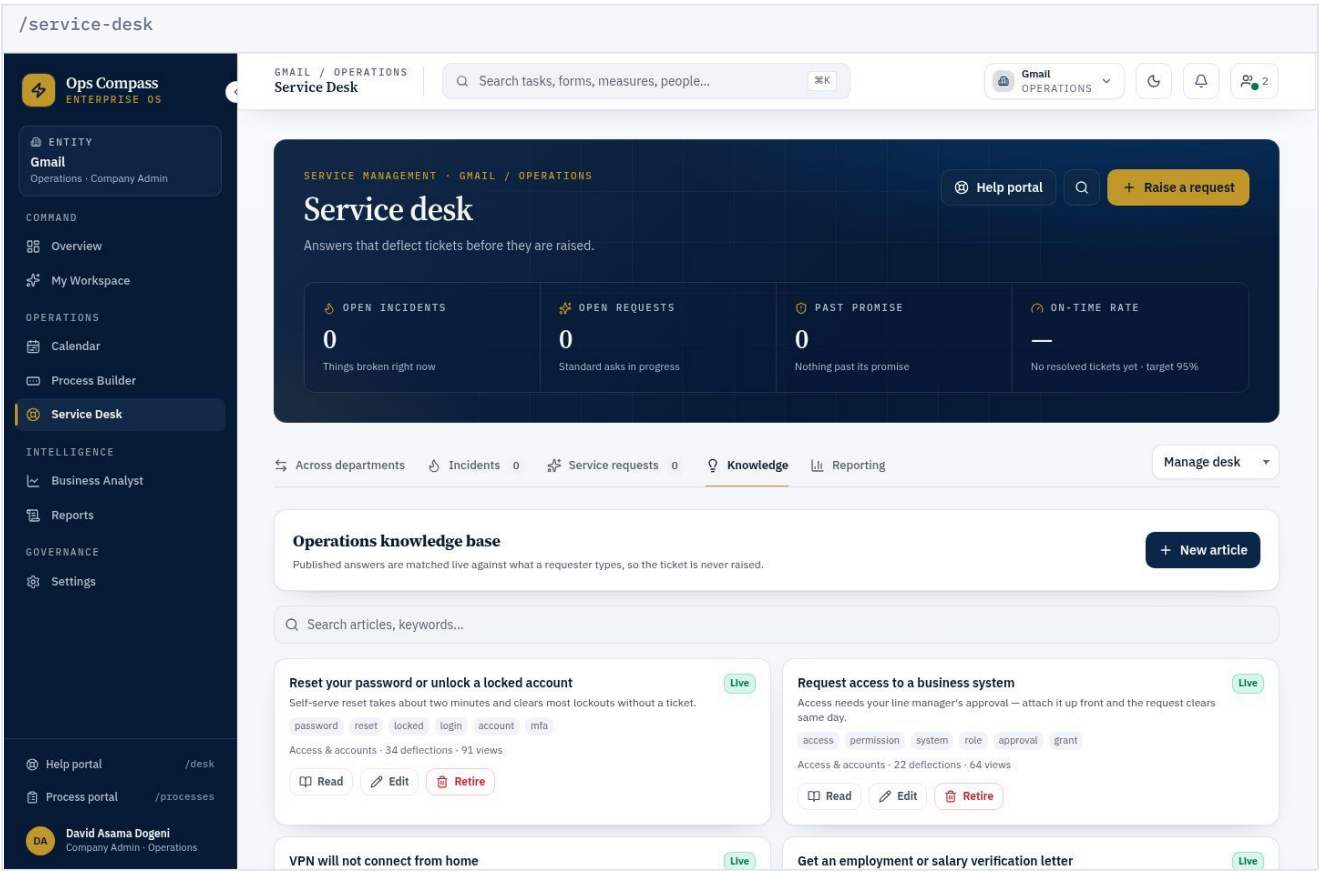
- Raised by your department — every ticket you sent, its status, owner and SLA. Select Refresh status for the latest.
- Inbound — work other departments raised with you.
- Requesters can also follow their tickets in the Help portal under My requests.

SERVICE DESK

Knowledge base and ticket deflection

Publish answers that appear while people type their problem, so many tickets are never needed.

For: Team member, Builder, Department admin, Company admin · **Where:** Service Desk › Knowledge · 1 min read



How deflection works

Live articles are matched against what a requester types when raising a ticket. If an article solves the problem, the requester says so and no ticket is created. Views and deflections are counted on every article and in Reporting.

Write an article

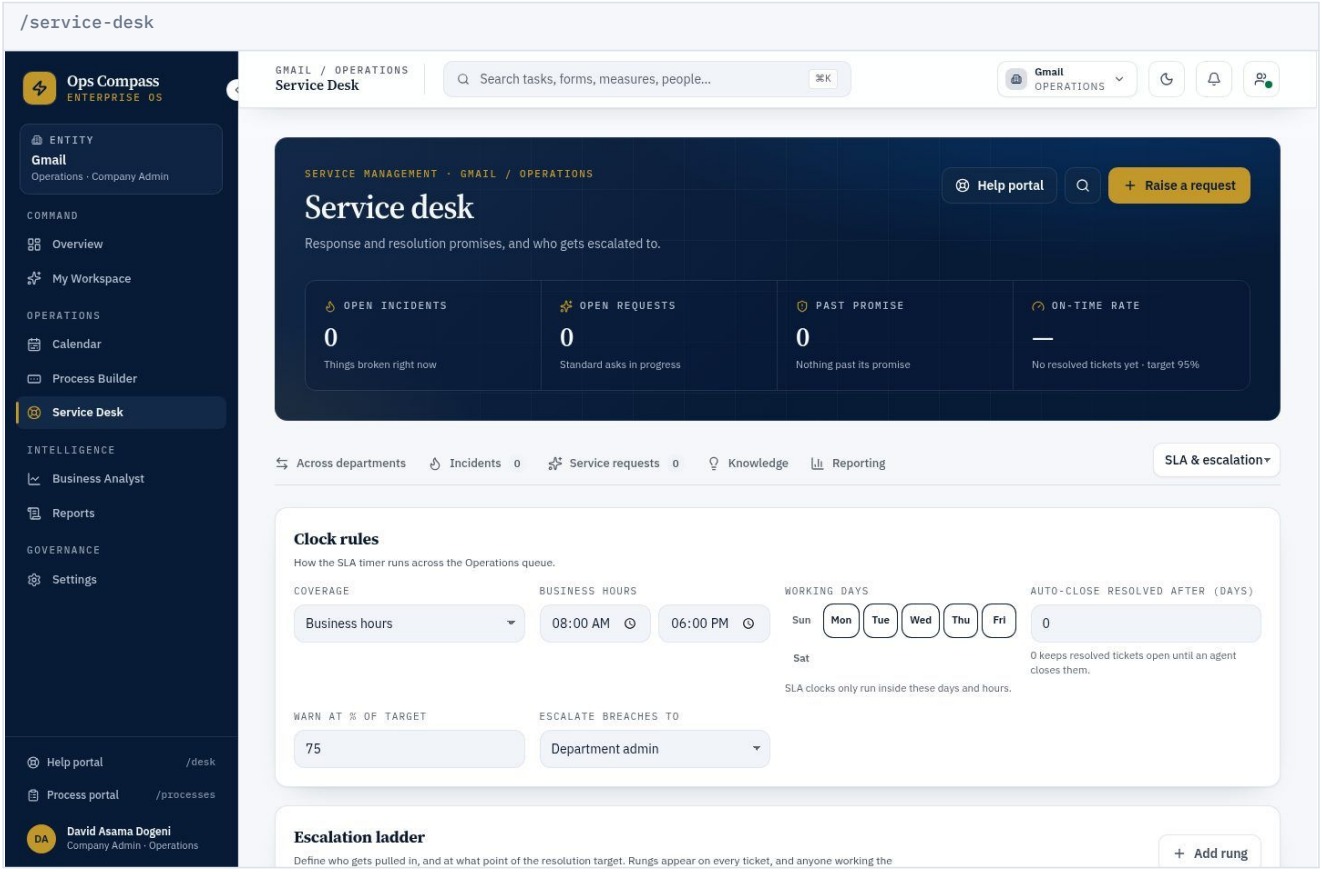
1. Select New article (or “Create article” from a resolved ticket).
2. Write a clear title, a short summary shown in the deflection card and the full steps.
3. Choose a category, keywords and whether it applies to incidents, requests or both.
4. Publish. Retire articles that are out of date.

SERVICE DESK

Managing the desk (administrators)

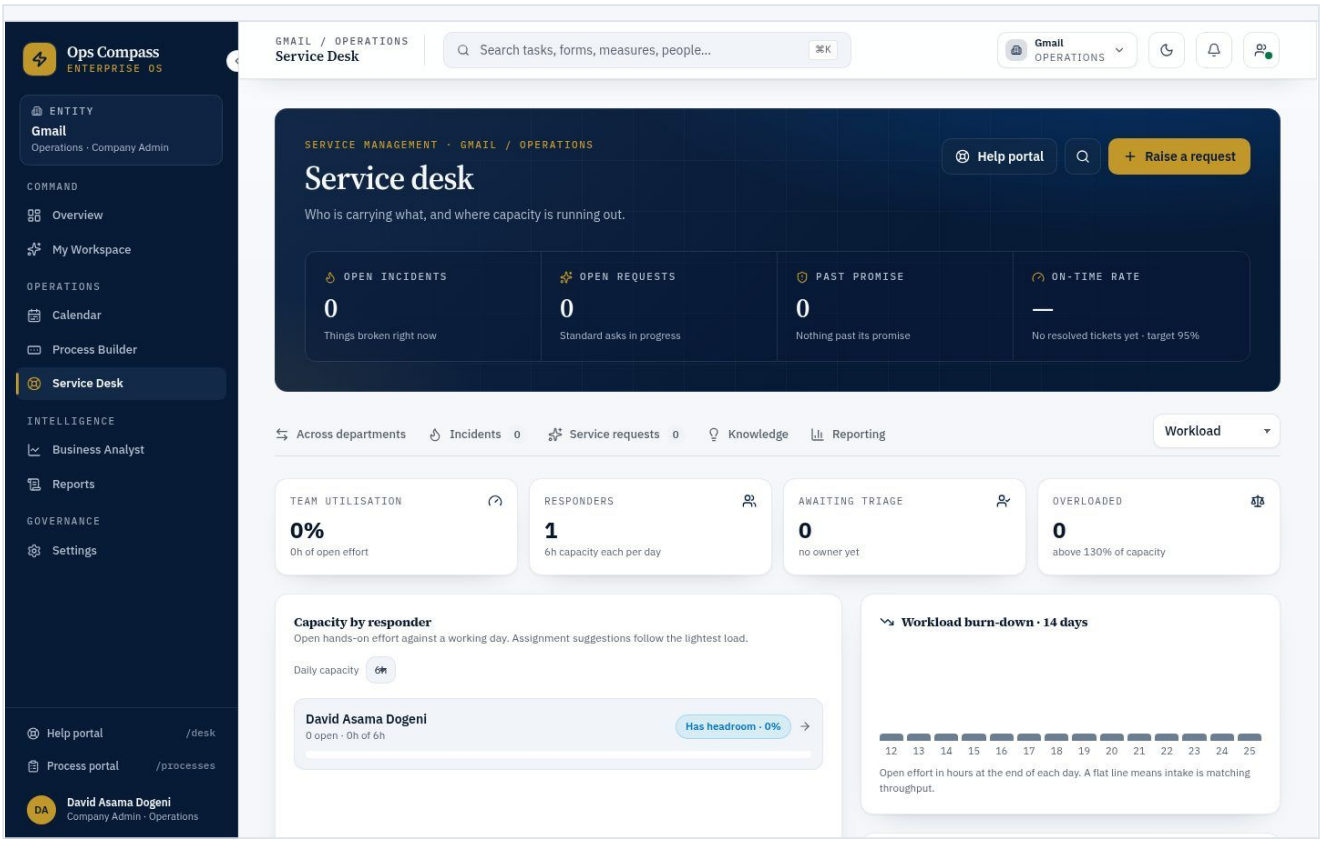
Workload and dispatch, service catalogue, request forms, templates, importing existing tickets, SLAs, escalation, business hours and holidays.

For: Department admin, Company admin · **Where:** Service Desk › Manage desk · 3 min read



Workload and dispatch

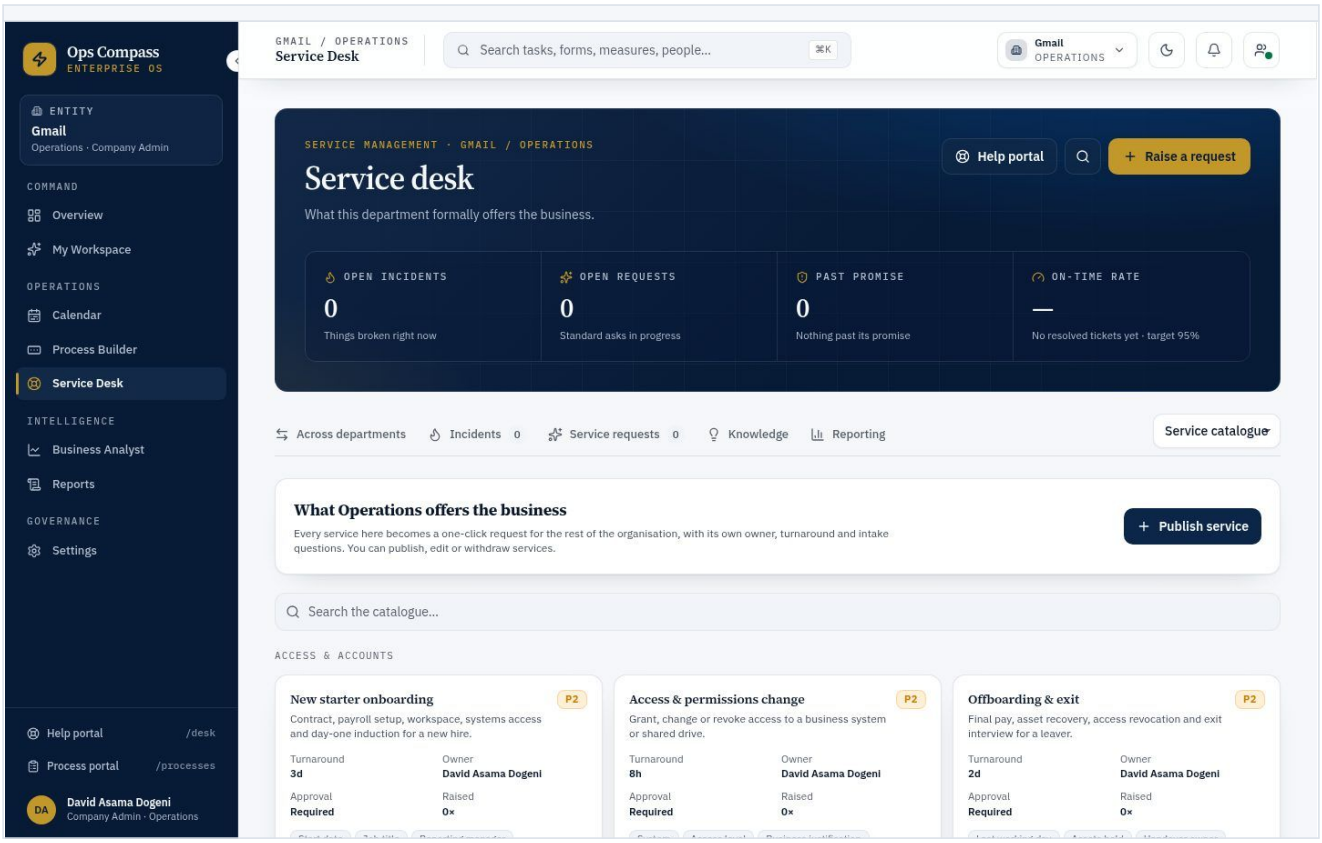
Workload shows team utilisation, responders, tickets awaiting triage and anyone overloaded. Capacity by responder compares open effort with each person’s daily capacity, and the 14-day burn-down shows whether the team is keeping up. Assignment suggestions follow the lightest load; dispatch rules can assign automatically by category.



Workload: utilisation, capacity by responder and the burn-down.

Service catalogue, request form and templates

- Service catalogue — what the department formally offers: each item has an owner, turnaround, approval rule and intake questions. Publish service to make it requestable.
- Categories — the department's categories, their subcategories and urgency, and the questions people must answer, including what partners see.
- Items are an optional third level under a subcategory (Category › Subcategory › Item). Each item can set its own urgency, helper text and extra questions; tick "Item required" to make requesters choose one. Departments that add no items keep the two-level form.
- Categories › Download template gives a spreadsheet of the current setup; fill it in and use Import to load every category, subcategory, item, urgency and question at once.
- Request form — who may raise work with the department and the rules partners follow.
- Templates — reusable sets of questions so requests arrive complete.



The service catalogue, grouped by area, with owner and turnaround.

Import existing tickets

Moving from another system? Load your department's existing incidents and service requests once, so history, open work and reporting start complete.

1. Open the Incidents or Requests tab and choose Import next to the queue filter.
2. Download template. The first sheet has two example rows; the second explains every column. Delete the examples and add one row per ticket, up to 1,000 per file.
3. Fill in at least Title, Requester name and Opened on. Status can be New, Assigned, In progress, On hold, Resolved or Closed. Resolved tickets need Resolved on, closed tickets need Resolved on or Closed on, and on-hold tickets need a Hold reason.
4. Save the file as .xlsx (or .csv) and choose it. Ops Compass checks every row and lists any problems by row number; nothing is imported until they are all fixed.
5. Choose Import. Each ticket gets a new INC- or SR- number; its old number is shown on the ticket as "was ..." and you can search for it.

- Categories, subcategories and items are matched to the department's own, ignoring capitals. A blank category files the ticket under General; names the department doesn't use are kept as written.
- Assigned to takes the email or full name of someone in the department. Anyone not found is left unassigned and noted before you import.
- Dates can be written 2025-03-14, 2025-03-14 09:30 or 14/03/2025 (day first). Times are read in your own time zone.
- Rows whose Previous reference was imported before are skipped, so uploading the same file again never creates duplicates.

Nobody is notified
Imported tickets don't send alerts to the team or to requesters. Closed tickets are recorded as confirmed on the requester's behalf, because they were signed off in the old system. Each import is written to the audit log.

SLA and escalation

1. Open Manage desk › SLA & escalation.
2. Clock rules: choose coverage (business hours or 24 × 7), the working days and hours, and after how many days an unconfirmed fix is flagged for a reminder (tickets never close on a timer).
3. Set the warning threshold (percent of target) and who breaches escalate to.
4. Build the escalation ladder: each rung names who is pulled in and at what percent of the resolution target.
5. Adjust response and resolution targets per priority, and add public holidays so clocks skip them.

Operations

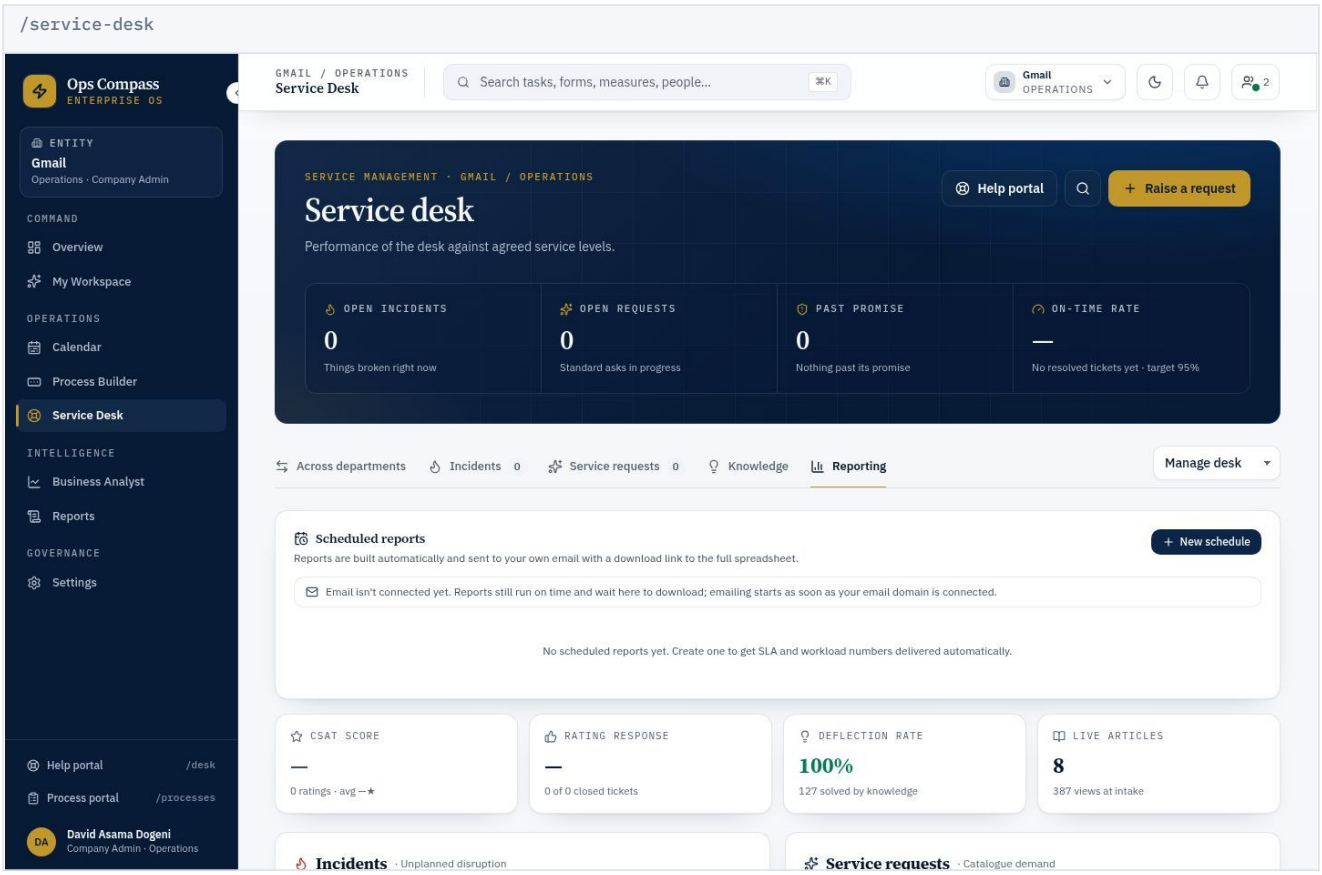
- Announcements — banners shown in the Help portal during outages or planned work.
- Technician scheduler and delegation — cover for absent technicians so their tickets keep moving.
- Email-to-ticket — emails sent to the desk address become tickets once email is connected.

SERVICE DESK

Service desk reporting and scheduled reports

A management view of the desk: service levels, backlog, team performance, satisfaction and what needs attention today — plus reports delivered automatically.

For: Team member, Builder, Department admin, Company admin · **Where:** Service Desk › Reporting · 2 min read



Choose the period and the queue

Pick 7 days, 30 days, 90 days, 12 months or All time, and look at all work, incidents only or service requests only. Each headline figure is compared with the period before, so you can see whether things are getting better or worse. Export CSV downloads the same figures for a board pack or spreadsheet.

> **Tip**
> Every figure comes from real tickets. When there is nothing to measure yet, the report says so instead of showing an estimate.

What is measured

MEASURE	MEANING
Raised / Resolved	Tickets opened, and tickets resolved or closed, in the period.
Open backlog	Tickets still open right now, and whether more are coming in than going out.
Resolution SLA met	Share of the tickets resolved in the period that met their resolution target.
Median time to resolve	The typical time from raising to resolving, excluding time on hold.
Satisfaction	Share of 4- and 5-star ratings on tickets finished in the period.
First response on time	Share of first responses that met the response target.
Reopen rate	Resolved tickets that were reopened because the fix did not hold.
Backlog ageing	How long open tickets have been waiting, split by priority.
Service levels by priority	Open, past-target, raised, resolved and on-time rates for P1 to P4.

MEASURE	MEANING
Team performance	Per person: open tickets, tickets past target, resolved, on-time rate, typical resolve time, satisfaction and reopens. Only tickets a person owns count; helping as a collaborator is credited under Contributions.
Demand	Where work comes from, by category and by intake channel.
Knowledge deflection	Problems solved by knowledge articles instead of tickets.

Needs management attention

This list always shows the situation right now, whatever period you choose. Select any ticket number to open it.

FLAG	WHEN IT APPEARS
Past their service level	An open ticket has missed its response or resolution target.
Urgent and unowned	A P1 or P2 ticket has no owner.
About to breach	An open ticket has used most of its time.
Waiting on an approval	A manager decision has been pending for more than a day.
On hold for a while	A ticket has been on hold for 3 days or more.
Resolved, not yet confirmed	The requester has not confirmed the fix 3 days after it was resolved.
Unhappy requesters, no follow-up	A 1- or 2-star rating that nobody has acted on yet.

Schedule a report

1. Select New schedule.
2. Choose what to include, how often (daily, weekly or monthly) and who receives it.
3. Save. Reports are built automatically with a download link to the full spreadsheet.

Good to know
Until your company’s email domain is connected, scheduled reports still run on time and wait to be downloaded; emailing starts as soon as the domain is connected.

CHAPTER 5

Intelligence

Business Analyst, connected systems and reports.

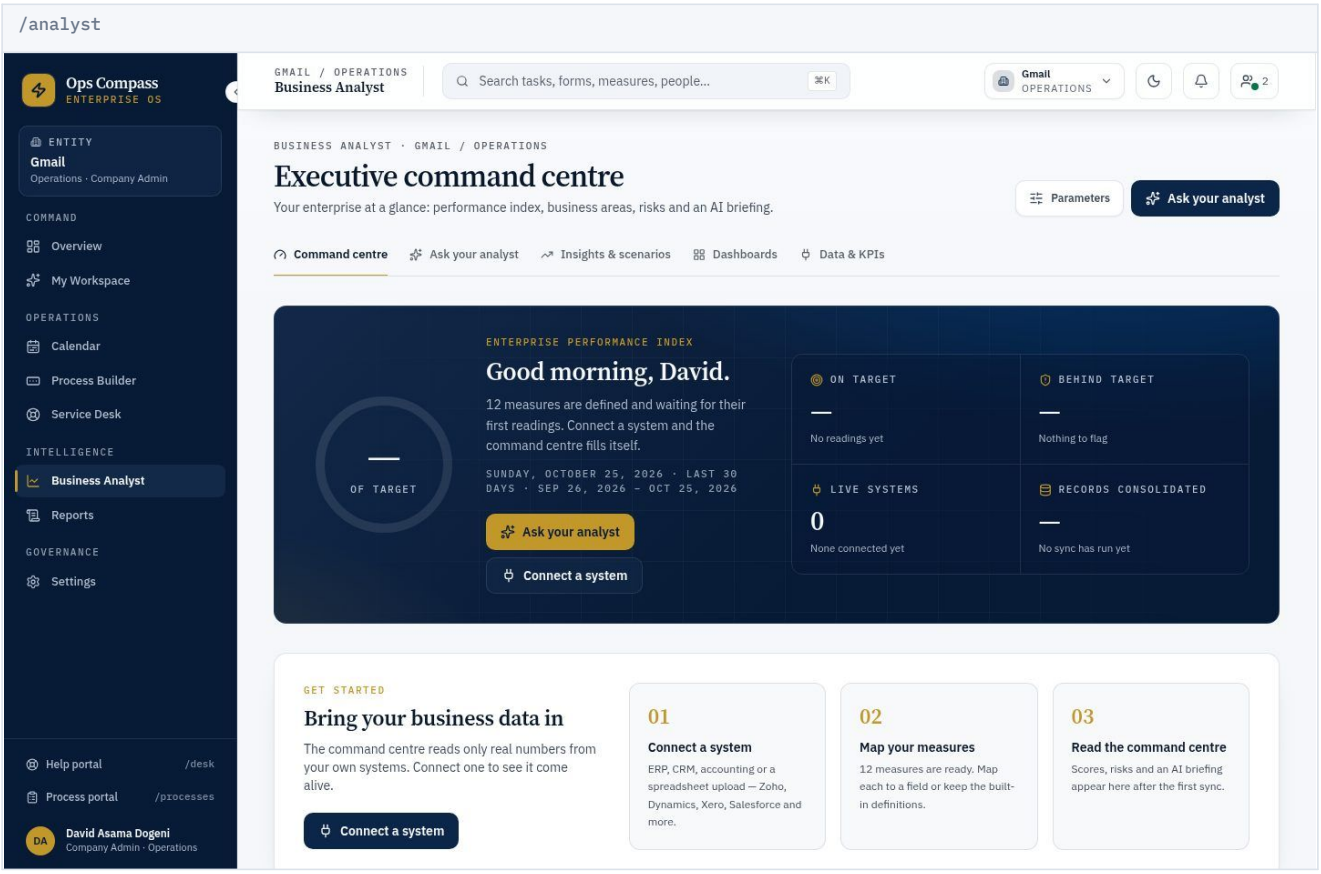
INTELLIGENCE

Business Analyst: the executive command centre

One read of enterprise performance: the performance index, business-area scores, KPI tiles, risks and an AI briefing.

For: Builder, Department admin, Company admin · **Where:** Sidebar › Intelligence › Business Analyst · 1 min read

/analyst



Five tabs

TAB	WHAT YOU DO THERE
Command centre	Read the enterprise performance index, business-area scores, key KPI tiles, risk register and strengths.
Ask your analyst	Ask questions in plain language and get answers, charts and an executive read.
Insights & scenarios	Automatic anomaly detection and what-if modelling.
Dashboards	Saved boards of the measures you watch.

TAB	WHAT YOU DO THERE
Data & KPIs	Connect systems, map measures, check feed health.

Reading the command centre

- Performance index ring — share of measures on target.
- On target / Behind target — counts of measures by status.
- Live systems and records consolidated — how much real data is feeding the view.
- Risk register — measures drifting away from target, ranked by impact.
- Ask your analyst — an on-demand AI executive read of the current numbers.

> **Only real numbers**
> Until a system is connected the command centre shows a guided set-up instead of figures. Measures with no readings show as “No data”, never as failing.

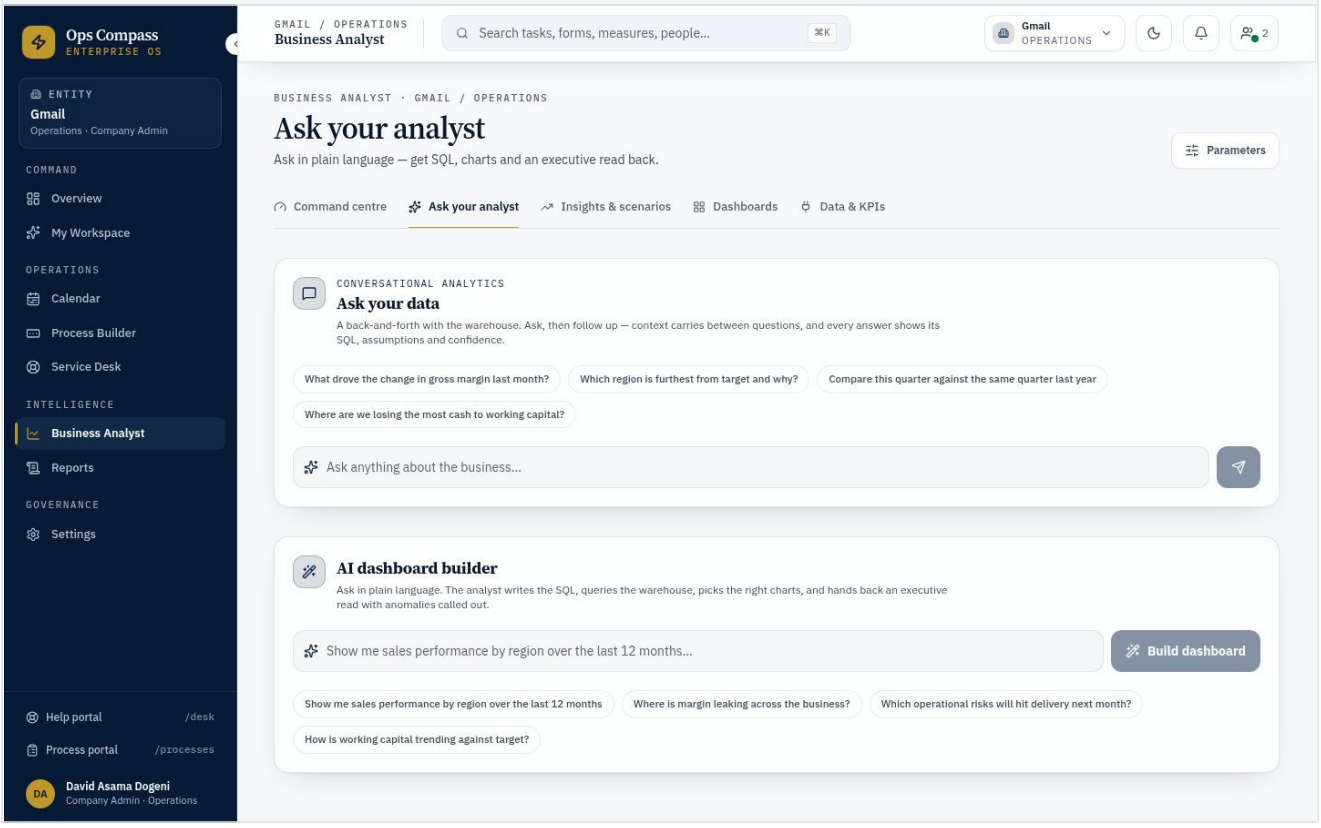
INTELLIGENCE

Ask your analyst, insights and scenarios

Ask questions of your data, build dashboards from a sentence, run anomaly scans and model what-if scenarios.

For: Builder, Department admin, Company admin · **Where:** Business Analyst › Ask your analyst / Insights & scenarios · 1 min read

/analyst

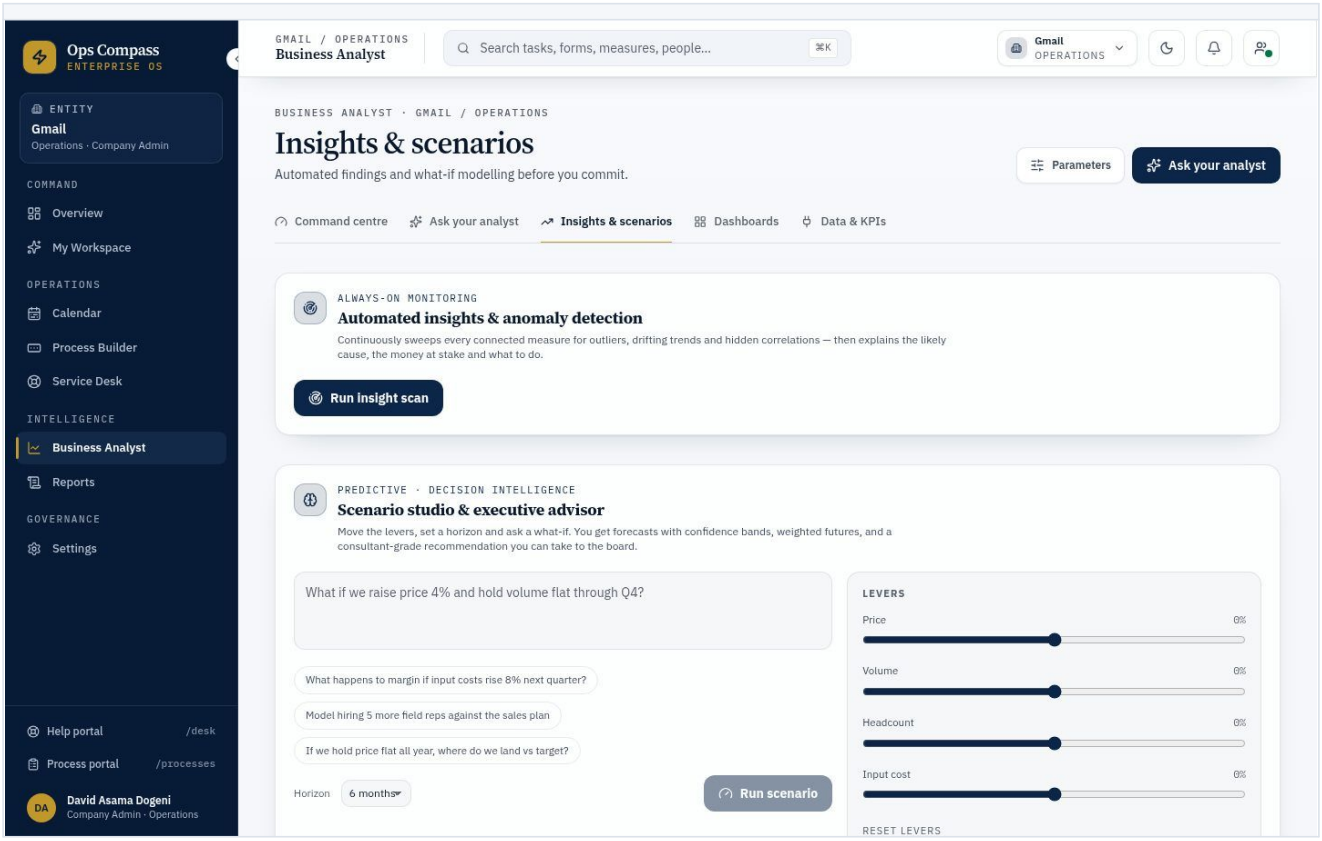


Ask your data

1. Type a question such as “Which region is furthest from target and why?” or pick a suggestion.
2. Read the answer, the chart and the assumptions and confidence shown with it.
3. Ask a follow-up — context carries between questions.
4. Use AI dashboard builder to describe a board (“Show me sales performance by region over the last 12 months”) and select Build dashboard.

Insights and scenarios

Run insight scan sweeps every connected measure for outliers, drifting trends and hidden correlations, then explains the likely cause and what is at stake. The scenario studio lets you move levers (price, volume, headcount, input cost), choose a horizon and run a forecast with confidence bands and a recommendation.



Automated insights and the scenario studio.

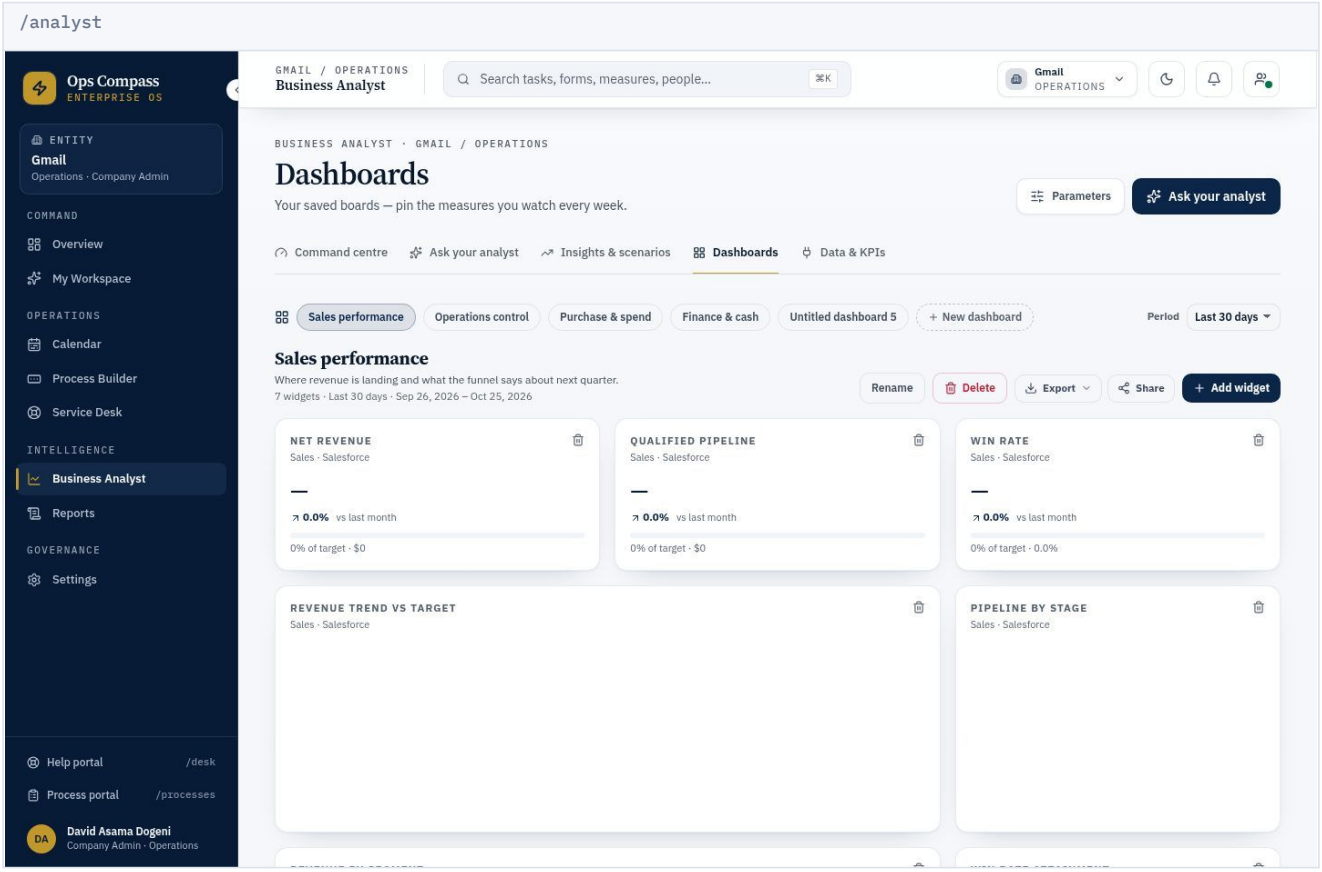
> **Tip**
> Administrators decide how bold the analyst may be — risk appetite, confidence floor, insights per scan — under Settings › AI guard-rails.

INTELLIGENCE

Analyst dashboards

Pin the measures you watch every week onto boards, with KPI cards, trends, breakdowns, gauges and tables.

For: Builder, Department admin, Company admin · **Where:** Business Analyst › Dashboards · 1 min read



Build a board

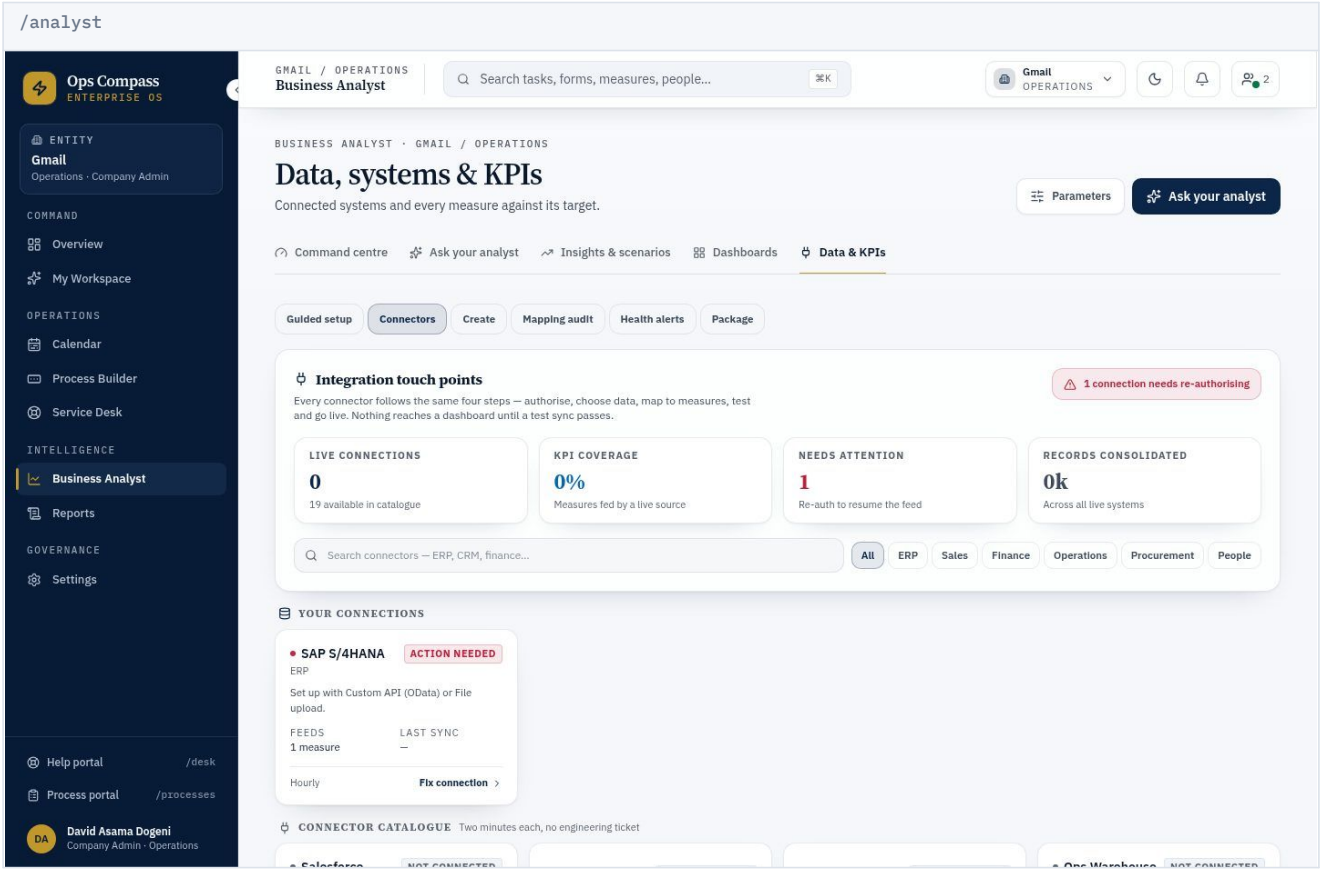
1. Select New dashboard, or open an existing board from the row at the top.
2. Select Add widget and choose a measure and a visual: KPI card, Trend line, Bar breakdown, Donut split, Target gauge or Table.
3. Choose the period (for example Last 30 days). Every widget follows it.
4. Rename, Share or Export the board from its toolbar.

INTELLIGENCE

Connecting business systems and data

Connect ERP, CRM, finance and other systems, upload files, call a custom API or push data, and choose the refresh cadence.

For: Builder, Department admin, Company admin · **Where:** Business Analyst › Data & KPIs › Connectors · 1 min read



Integration touch points

Every connector follows the same four steps: authorise, choose data, map to measures, and go live. The panel shows live connections, KPI coverage, feeds that need attention and records consolidated. Connecting and editing connections is limited to administrators; Builders can see status.

METHOD	BEST FOR
Catalogue connector	Popular systems such as Zoho Books and CRM, Microsoft Dynamics 365 Business Central and Sales, Xero, HubSpot, Salesforce, Snowflake and Shopify.
File upload	CSV or Excel (.xlsx) exports. Older .xls files must be saved as .xlsx first.
Custom API	Any system with a web API. Credentials stay on the server and private-network addresses are blocked.
Push (webhook)	Your system sends readings to Ops Compass using a secret token.

Good to know
Some catalogue entries (for example SAP, Sage, Odoo and Oracle) are marked as needing set-up with your own credentials. They become selectable once that is done.

Connect a system

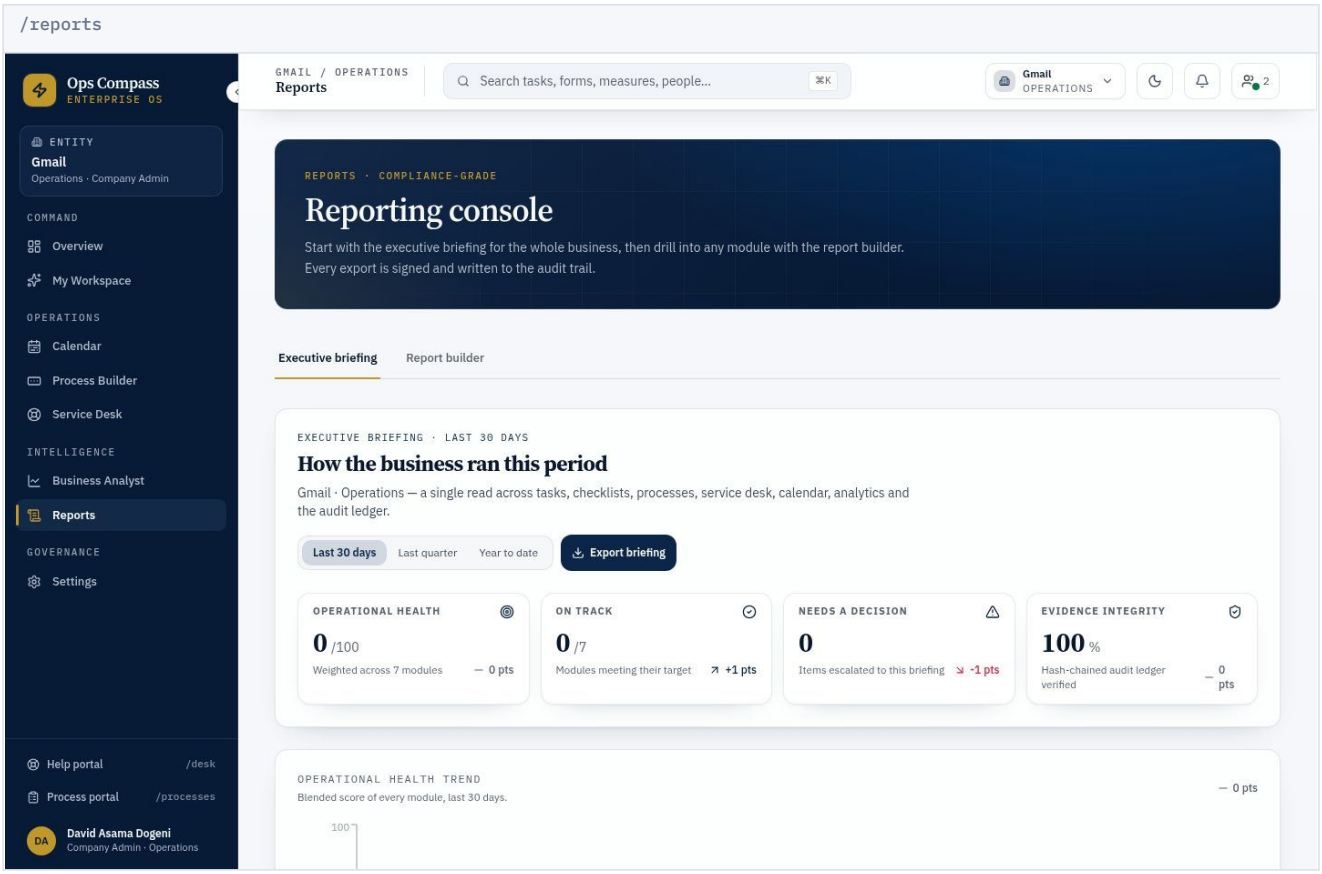
1. Open Data & KPIs › Connectors and search or filter the catalogue (ERP, Sales, Finance, Operations, Procurement, People).
2. Choose the system and enter the details it asks for — for example the organisation ID for Xero or the warehouse for Snowflake.
3. Map fields to measures. Mapping audit shows exactly which source field feeds each measure.
4. Choose the refresh cadence — Manual, or anything from every 5 minutes to every 31 days.
5. Go live. Health alerts warn if a feed fails or needs re-authorising.

INTELLIGENCE

Reports: executive briefing and report builder

Read the executive briefing for any period and build signed, exportable reports from any module.

For: Team member, Builder, Department admin, Company admin · **Where:** Sidebar › Intelligence › Reports · 1 min read

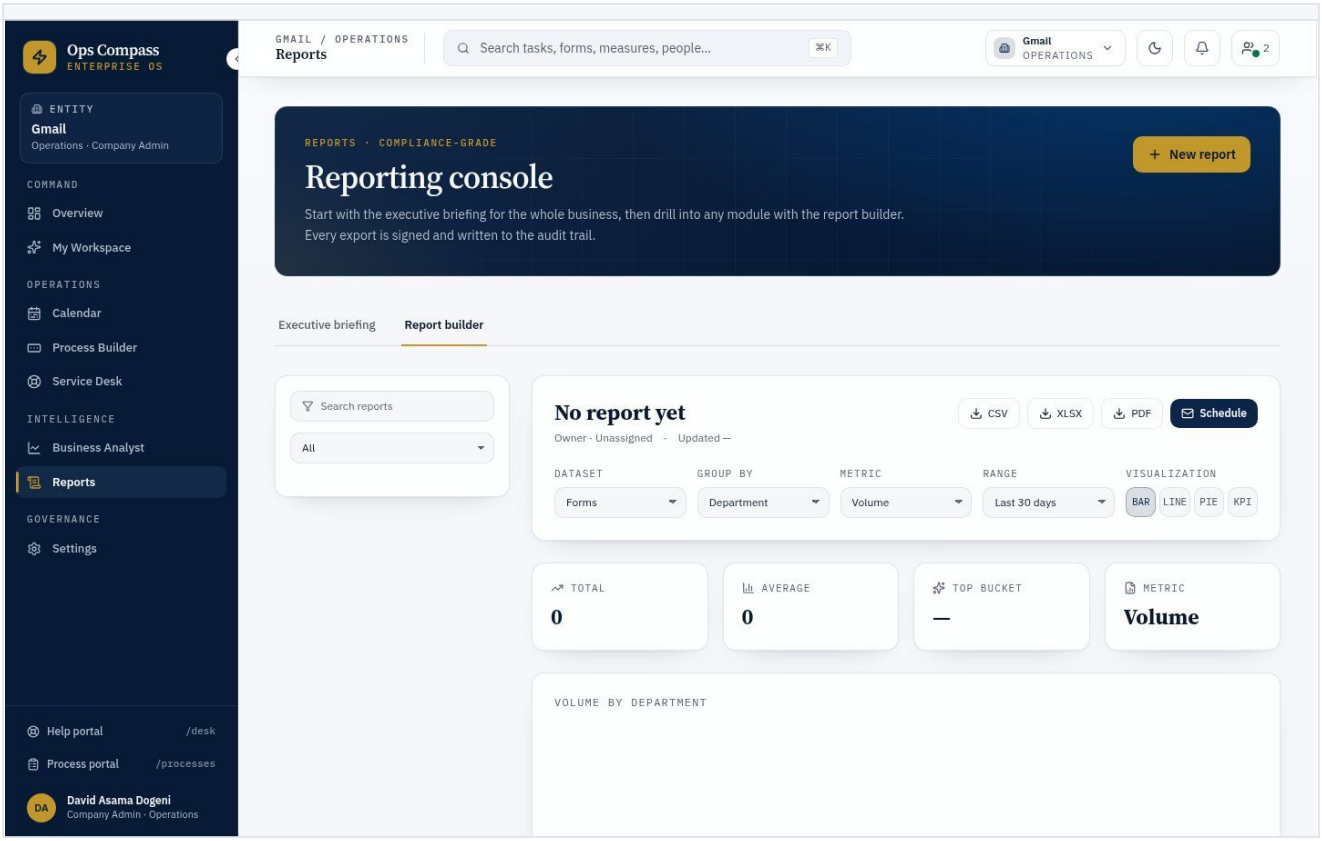


Executive briefing

A single read across tasks, checklists, processes, service desk, calendar, analytics and the audit ledger: operational health, modules on track, items needing a decision and evidence integrity (whether the hash-chained audit ledger verifies). Pick Last 30 days, Last quarter or Year to date and select Export briefing.

Report builder

1. Open Report builder and select New report.
2. Choose the dataset (for example Forms), how to group it, the metric and the range.
3. Pick a visualisation: bar, line, pie or KPI.
4. Export as CSV, XLSX or PDF, or select Schedule to have it delivered.



Report builder: dataset, grouping, metric, range and visual.

Good to know
Every export is signed and written to the audit trail. Members can view reports; exporting evidence needs Builder or above.

CHAPTER 6

Governance

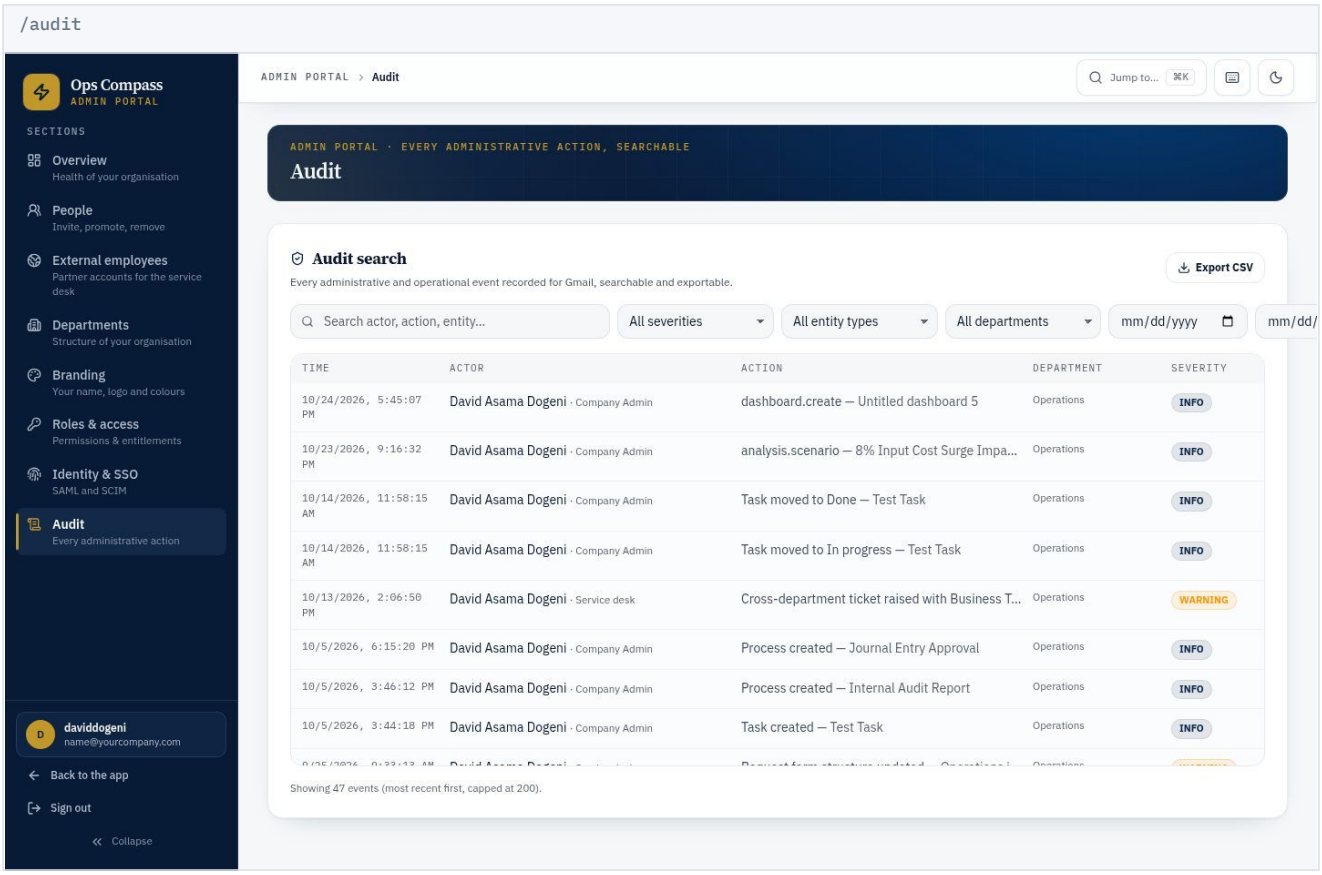
Audit evidence and the parameter control room.

GOVERNANCE

Audit Trail: tamper-evident evidence

Every action is recorded with who, what, when and where, in a hash-chained ledger that shows any tampering.

For: Department admin, Company admin · **Where:** Sidebar › Governance › Audit Trail, and Admin portal › Audit · 1 min read



What is recorded

Task moves, checklist runs, process changes and submissions, ticket events, setting changes, exports, sign-ins and every administrative action. Each entry carries the time, the actor and their role, the action, the department and a severity (Info, Warning, Critical).

Why you can trust it

- The database fills in who did it from the signed-in account — nobody can record an action in someone else's name.
- Entries are chained with a cryptographic hash; changing or deleting an old entry breaks the chain and shows on the evidence-integrity check.
- Audit entries are excluded from automatic data retention, so the chain is never broken by clean-up.

Search and export

1. Search by actor, action or entity.
2. Filter by severity, entity type, department and date range.
3. Select Export CSV to hand the filtered evidence to an auditor.

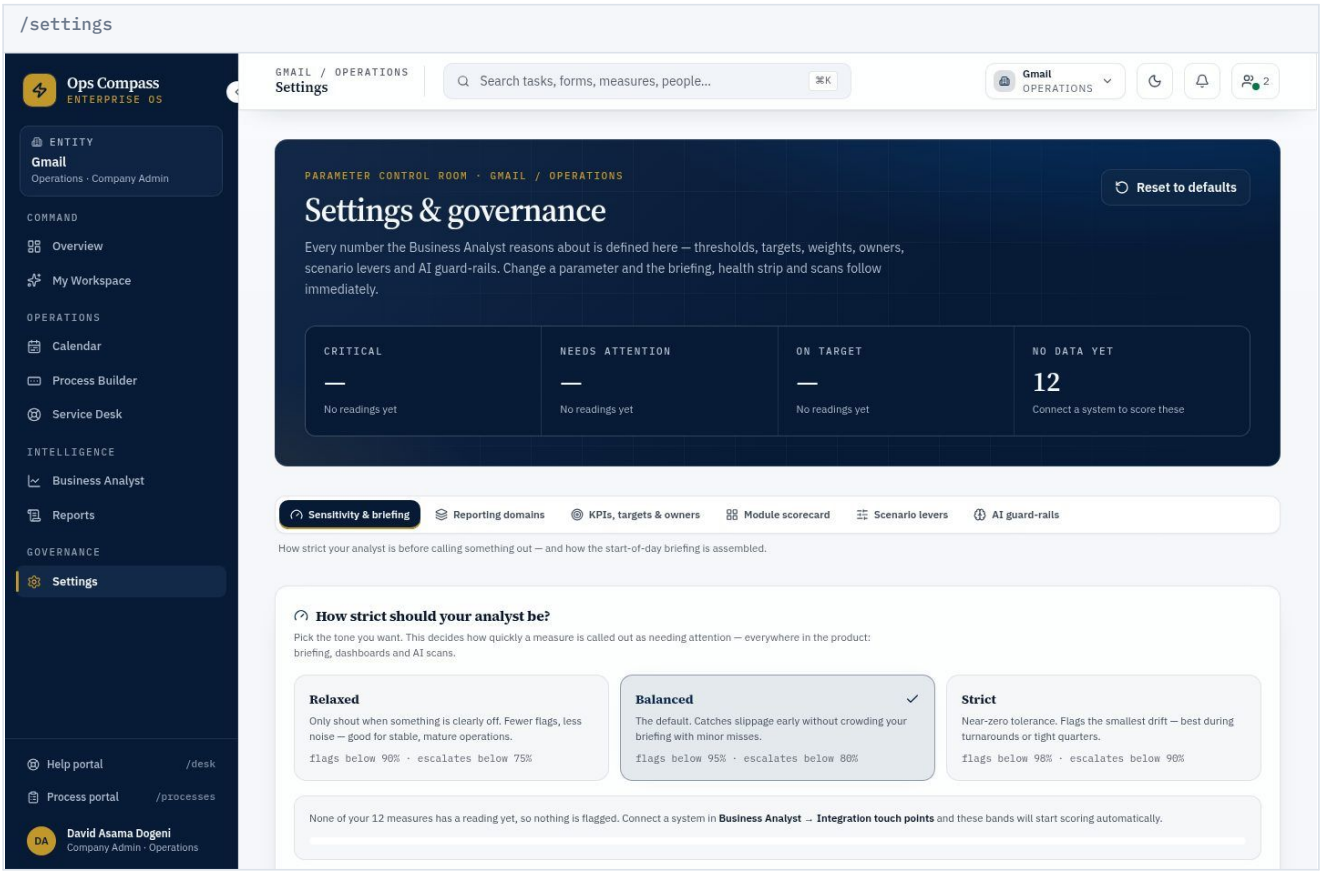
> **Good to know**
> Department admins see their department’s events; company admins see events across all departments.

GOVERNANCE

Settings and governance

The parameter control room: how strict the analyst is, reporting domains, KPI targets and owners, scorecards, scenario levers and AI guard-rails.

For: Team member, Builder, Department admin, Company admin · **Where:** Sidebar › Governance › Settings · 1 min read

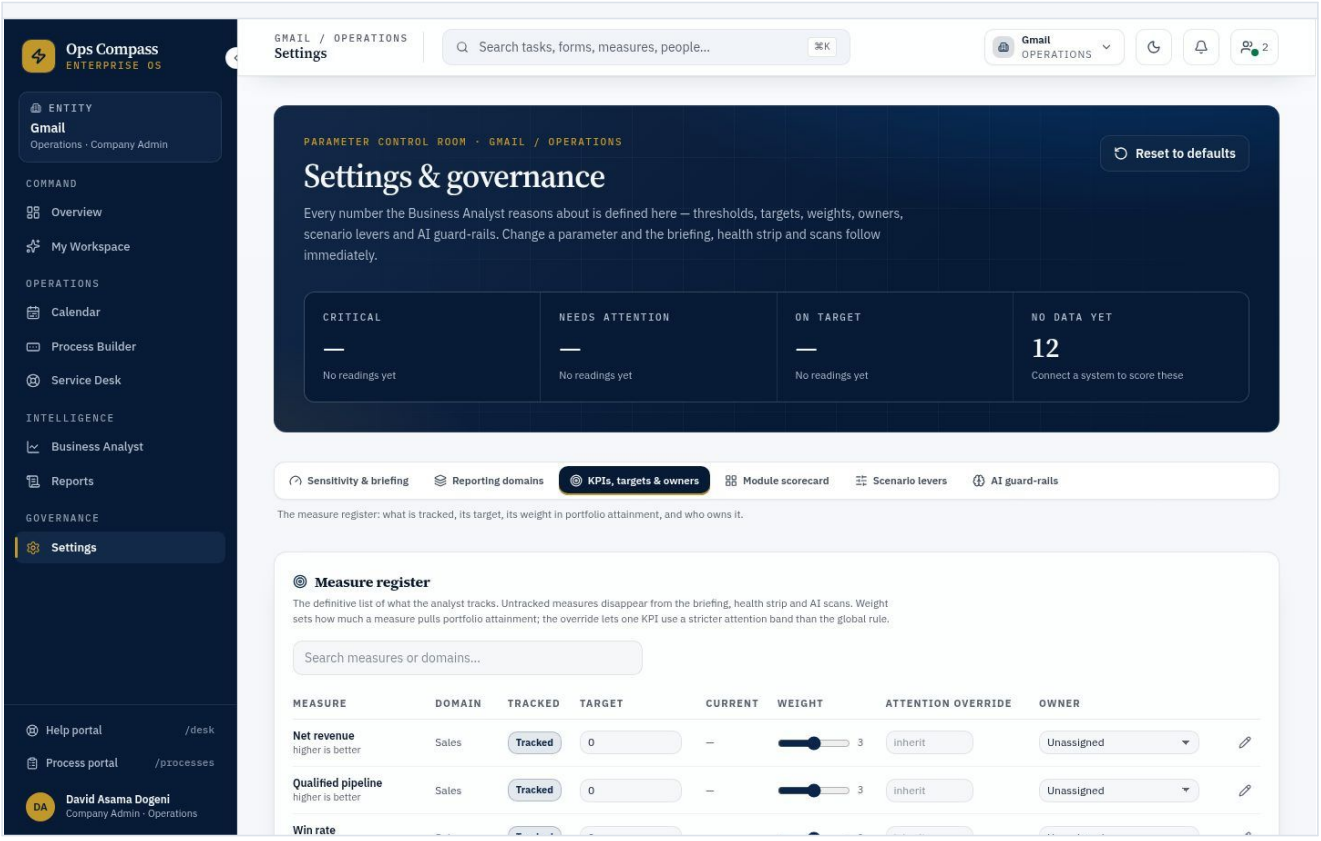


Header counts

Critical, Needs attention and On target count measures that have real readings. Measures without readings are counted separately under “No data yet” — they are never shown as critical.

The six tabs

TAB	WHAT IT CONTROLS
Sensitivity & briefing	How strict the analyst is (Relaxed, Balanced, Strict) and how the start-of-day briefing is put together.
Reporting domains	The business areas measures belong to (Sales, Finance, Operations…).
KPIs, targets & owners	The measure register: tracked or not, target, weight in the portfolio score, attention override and owner.
Module scorecard	One row per module on the overview and briefing: accountable owner, analyst note and visibility.
Scenario levers	The levers offered in the scenario studio and their ranges.
AI guard-rails	Risk appetite, confidence floor, maximum insights per scan and anomaly sensitivity.



The measure register: target, weight, override and owner for every KPI.

Who can change settings

> **Good to know**
> Everyone can read settings. Only department and company admins can change them, and the database itself refuses changes from other roles. Select Reset to defaults to return every parameter to the shipped values.

CHAPTER 7

Portals

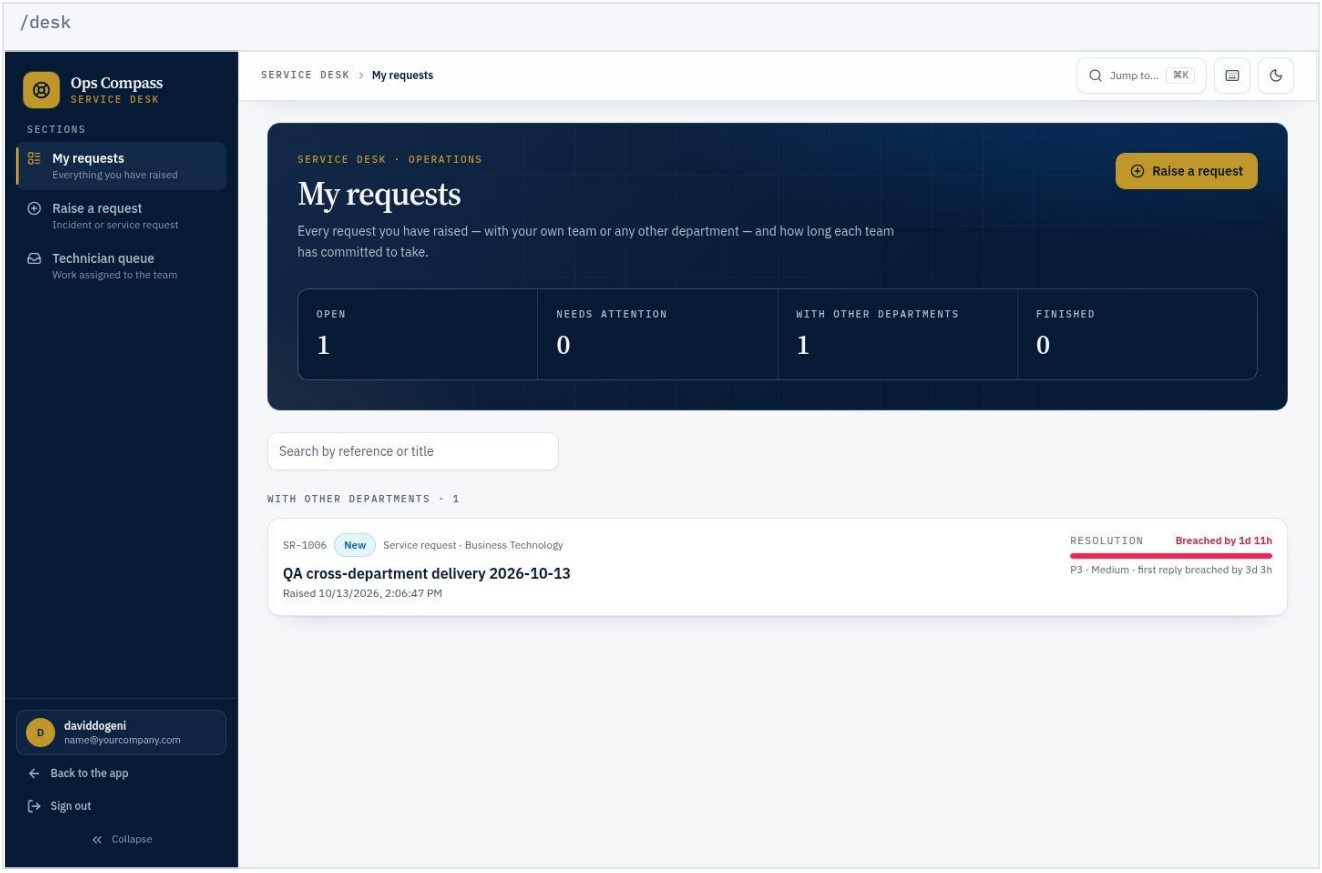
Help, process, partner and booking portals.

PORTALS

Help portal: raise and track requests

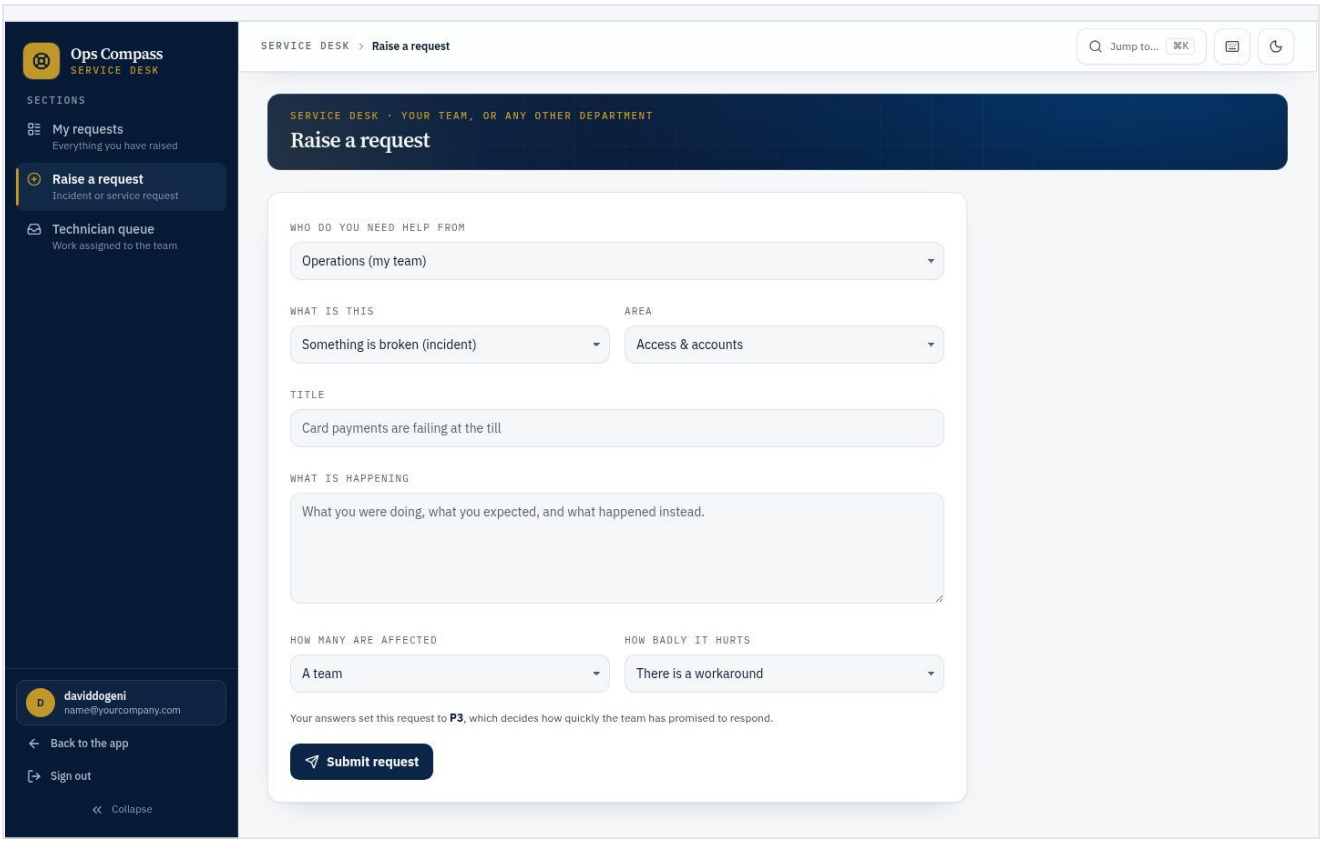
The simple front door for asking for help — raise an incident or request with any department and watch its clock.

For: Team member, Builder, Department admin, Company admin, External collaborator · **Where:** Left menu › Help portal, or /desk · 1 min read



Raise a request

1. Open the Help portal and select Raise a request.
2. Choose who you need help from — your own team or any other department.
3. Choose whether something is broken (incident) or you need something (request), and the area.
4. Give it a title and describe what you were doing, what you expected and what happened.
5. Say how many people are affected and how badly it hurts. The portal shows the resulting priority and how quickly the team has promised to respond.
6. Select Submit request. Suggested knowledge articles may solve it before you even submit.



Raise a request: department, type, area, description, impact and urgency.

Track your requests

My requests lists everything you have raised — with your own team or any other department — with its status and a live resolution clock that turns amber when at risk and red when the promise is missed. Search by reference or title.

- Open any request to see its progress (Received, Picked up, Being worked on, Your confirmation, Closed), who owns it, the full conversation and its history.
- Send the team a message from the same page — internal team notes are never shown to you.
- When the team marks it fixed it appears under Waiting for your confirmation. Choose Yes, it's fixed to close it (you can rate the service), or No, it's not fixed and say what is still wrong — it goes back to the team.
- A request is only closed once you confirm it.

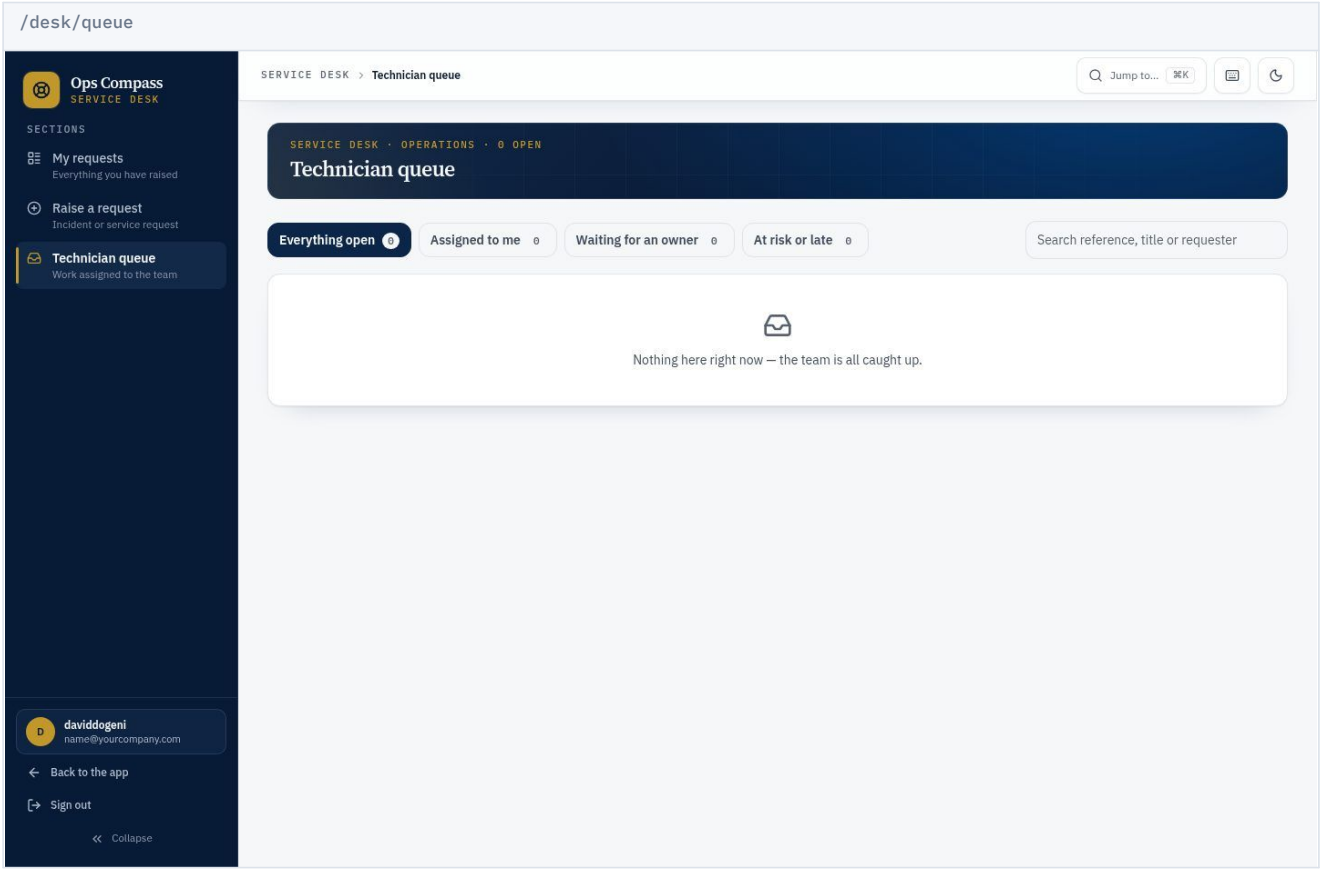
> **Tip**
> Share the Help portal address with colleagues who only need to ask for help — it is shown with a Copy button on the Help portal sign-in page.

PORTALS

Technician queue

Work the team’s tickets from a focused queue: everything open, assigned to you, waiting for an owner or at risk.

For: Team member, Builder, Department admin, Company admin · **Where:** Help portal › Technician queue · 1 min read



Work the queue

- Everything open — all live tickets for the team.
- Assigned to me — your work.
- Waiting for an owner — triage these first.
- At risk or late — tickets close to or past their promise.

Handle a ticket

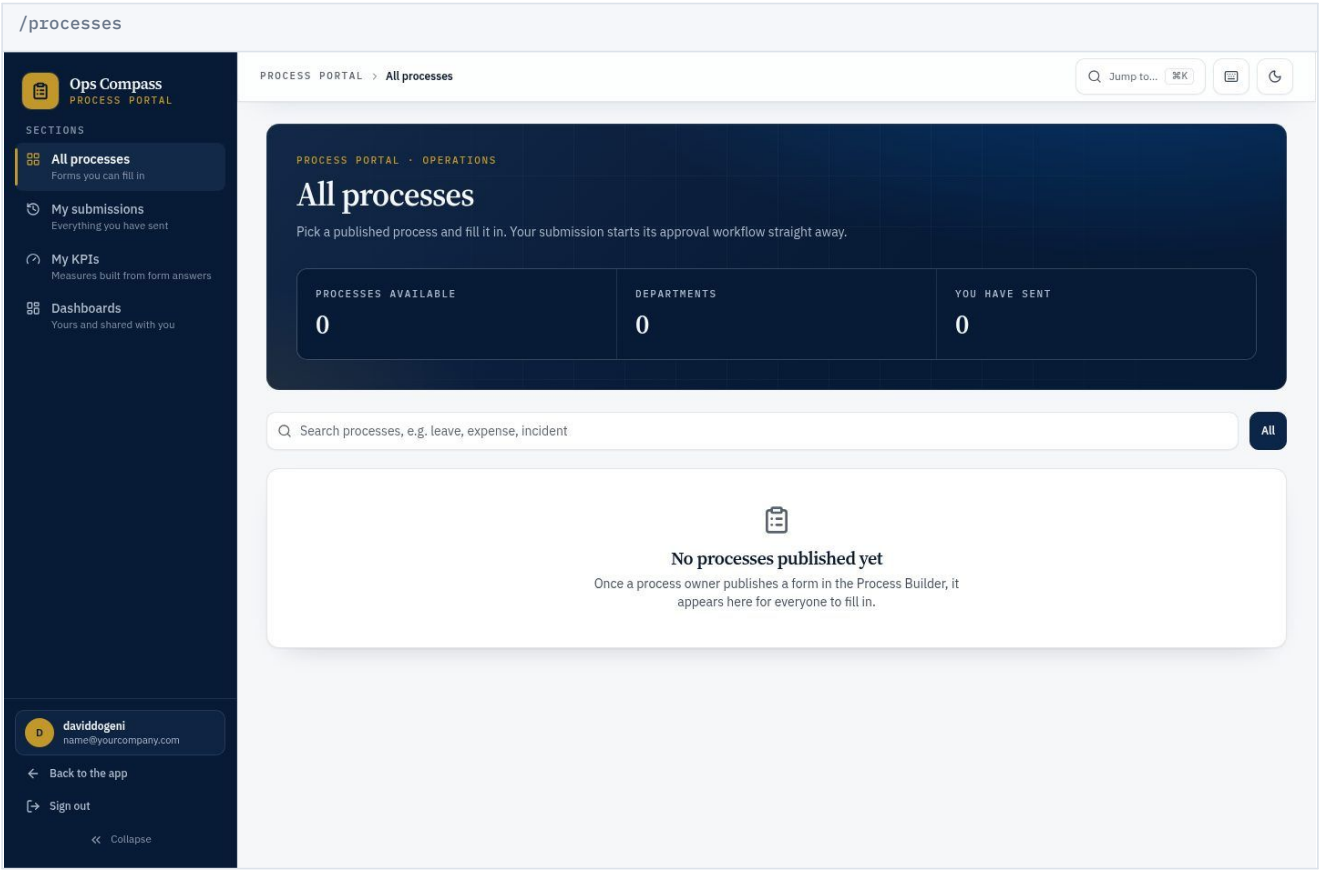
1. Open the ticket, take ownership and set the right priority.
2. Reply to the requester or add an internal note.
3. Put it On hold if you are waiting on them — write the reason (it is required and the requester sees it) and the clock pauses.
4. Resolve with a clear resolution. The requester is asked to rate the service.

PORTALS

Process portal: fill in forms

Find any published process, fill it in on any device and follow your submissions through approval.

For: Team member, Builder, Department admin, Company admin, External collaborator · **Where:** Left menu › Process portal, or /processes · 1 min read

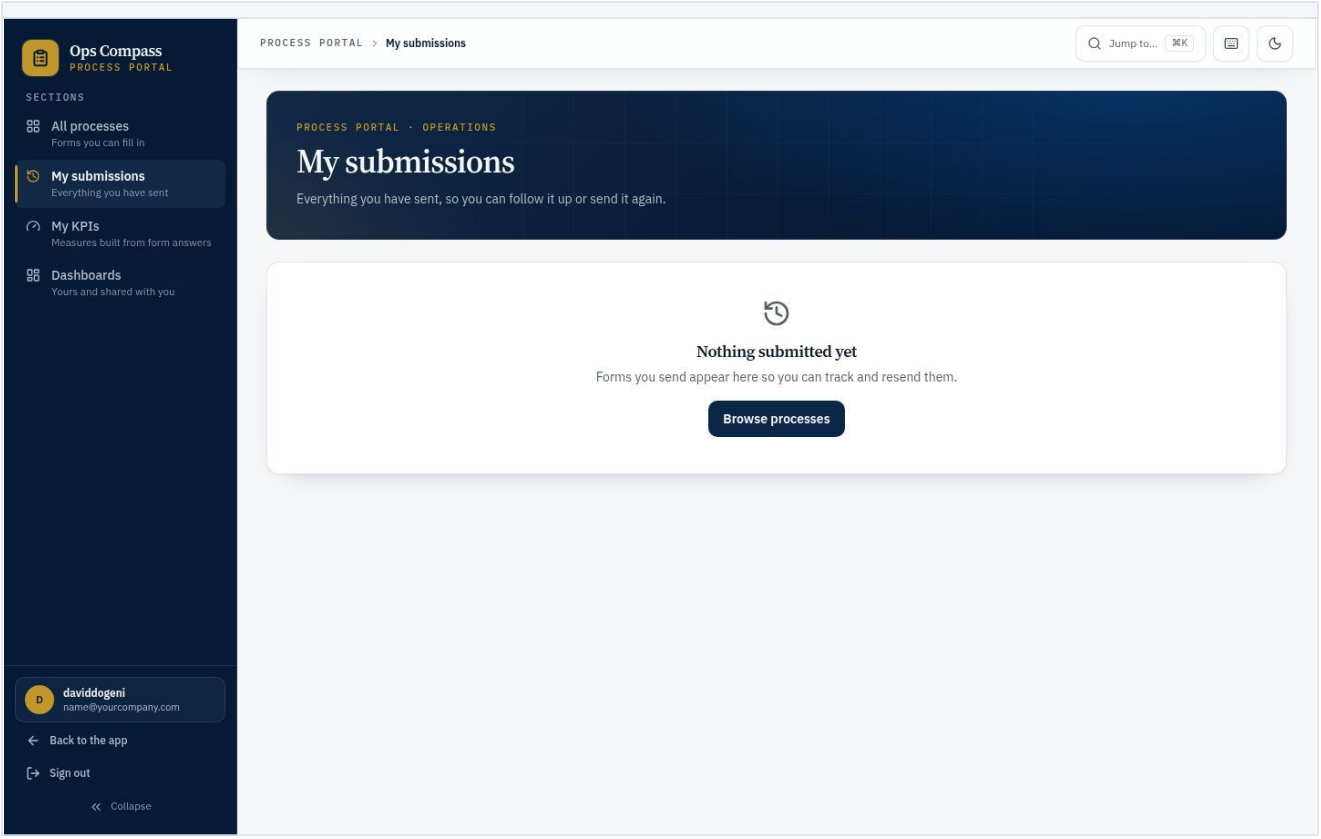


Fill in a process

1. Open All processes and search (for example “leave”, “expense”, “incident”) or filter by department.
2. Published processes from other departments appear when their owner grants access to you, your department or a task group you belong to. Creating a draft or assigning access alone does not publish it.
3. Open the process and read the welcome page — it says how long it takes and what to have ready.
4. Answer each page. Required fields are marked; photos, files and signatures can be added from a phone.
5. Submit. Your submission starts its approval workflow straight away.

My submissions

Everything you have sent, with its status and approval stage, so you can follow it up or send it again.



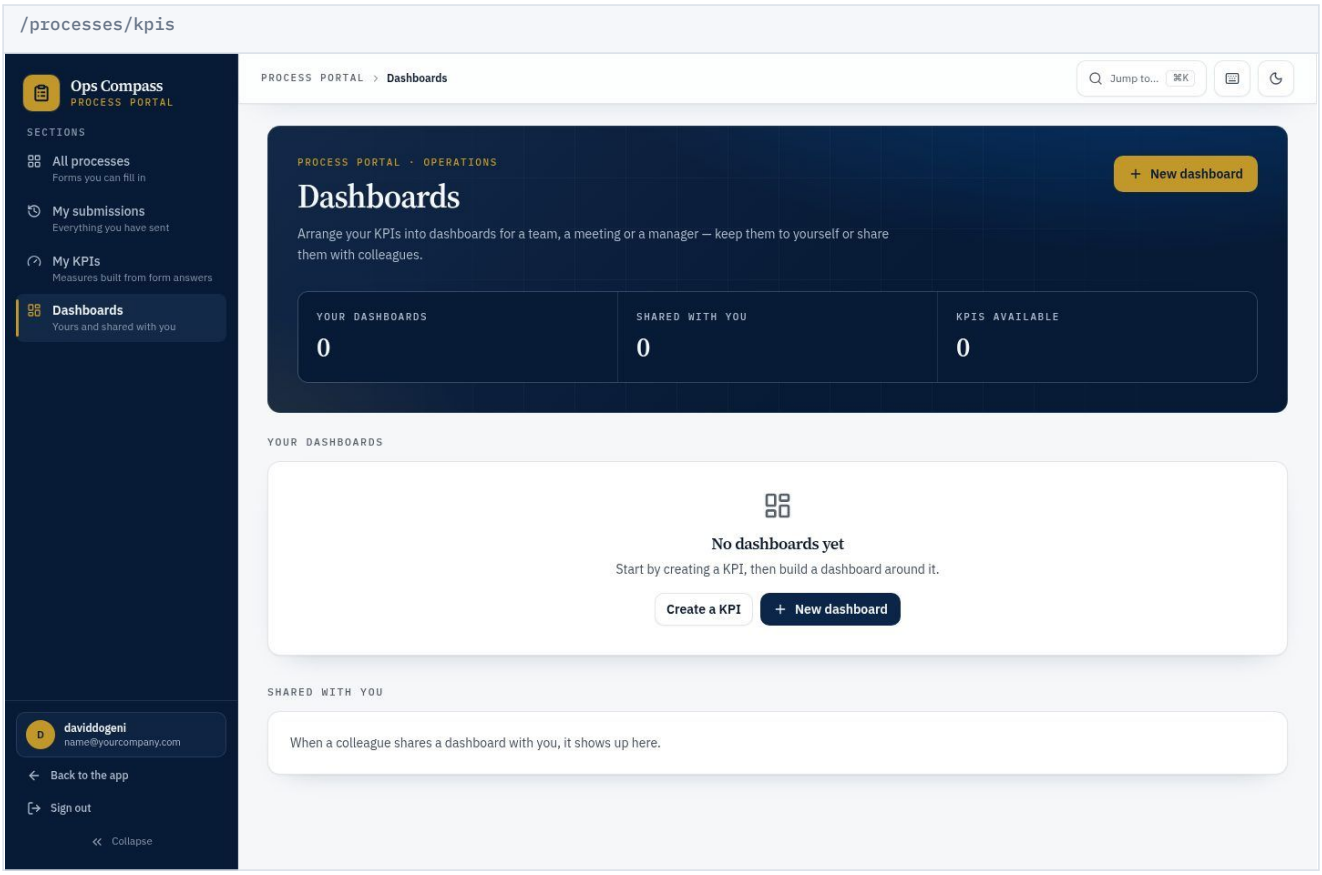
My submissions keeps a history of everything you have sent.

PORTALS

My KPIs and shareable dashboards

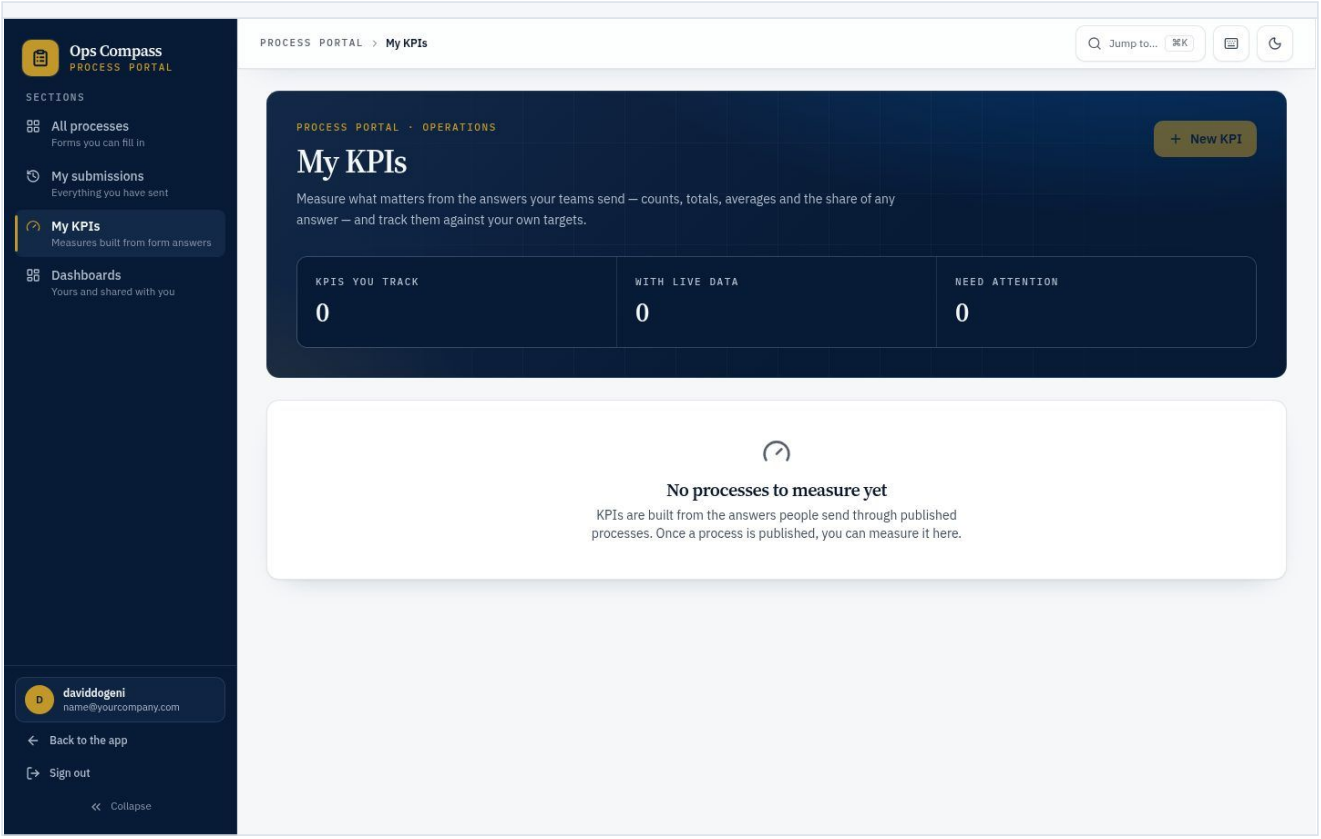
Turn form answers into your own KPIs, arrange them into dashboards and share them with your department or chosen colleagues.

For: Team member, Builder, Department admin, Company admin · **Where:** Process portal › My KPIs / Dashboards · 1 min read



Create a KPI

1. Open My KPIs and select New KPI.
2. Choose a published process and what to measure: number of submissions, number of people, total, average, minimum, maximum, or the share of a particular answer.
3. Add filters (for example only Line 2), the period, a target and whether higher or lower is better.
4. Save. The KPI shows its live value against target; “Need attention” counts KPIs off target.



My KPIs: measures you track, with live data and those needing attention.

Build and share a dashboard

1. Open Dashboards and select New dashboard.
2. Add widgets — Number, Trend or Breakdown — choose a KPI for each, and set size and order.
3. Select Share and choose Only me, the whole department or selected colleagues.
4. Colleagues see it under “Shared with you”. They can view it or make their own copy, but cannot change yours.

Good to know
KPIs and dashboards use answers from your department’s published processes. If nothing is published yet, the pages explain that there is nothing to measure.

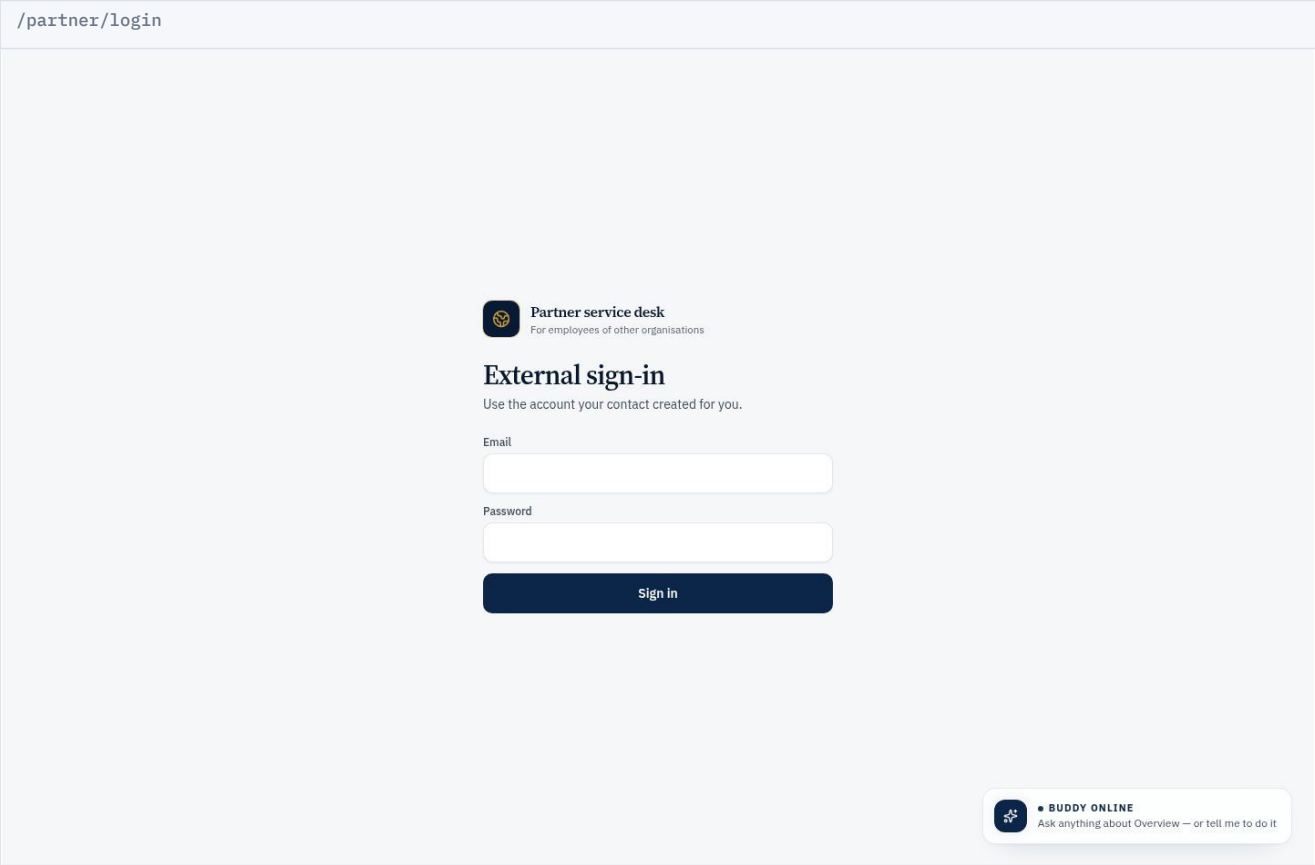
PORTALS

Partner desk for external users

How employees of partner organisations sign in, log tickets with your departments and follow only their own requests.

For: Partner employee, Department admin, Company admin · **Where:** /partner · 1 min read

/partner/login



For partner employees

1. Open the partner sign-in page your contact gave you and sign in with the account they created for you.
2. Raise an incident or a service request with a department that accepts partner work, answering its questions.
3. Follow your tickets and their service-level clocks. You only ever see tickets you raised.

Good to know
Your access has an end date set by your contact. When it passes, or if access is revoked, sign-in stops working.

For administrators

Create partner accounts in Admin portal › External users, and choose which departments accept partner work and what partners must answer under Service Desk › Manage desk › Request form.

PORTALS

Booking a meeting (visitors)

How visitors pick a slot from a booking link, and reschedule or cancel with their private link.

For: Visitor, Team member, Builder, Department admin, Company admin · **Where:** /book/… links shared by staff · 1 min read

Book a slot

1. Open the booking link you were sent.
2. Pick a day and one of the free times shown (they are already in your time zone).
3. Enter your name, email and a short note, then confirm.
4. You receive a confirmation with a private manage link.

Reschedule or cancel

Open your private manage link to move or cancel the appointment. Keep it private — anyone with the link can change the booking. Links are protected against guessing and repeated attempts.

CHAPTER 8

Administration

People, departments, branding, access and SSO.

ADMINISTRATION

My Docs setup: connect Microsoft 365, Google Drive and Zoho WorkDrive

Step-by-step instructions for your IT administrator to switch on Microsoft, Google and Zoho sign-in so employees can open their files in My Docs.

For: Company admin, Department admin · **Where:** My Docs › Setup guide · 4 min read

Before you start

Each service needs a one-time sign-in app created by an administrator of that service. Once it exists, every employee connects their own account with one click, and Ops Compass only sees what that person is already allowed to see.

YOU WILL NEED	WHY
Your Ops Compass address, e.g. https://compass.1879techhub.com	The services send people back here after sign-in.
The redirect address: https://<your Ops Compass address>/api/oauth/calendar/return	The same address is used for Calendar and My Docs, for every service.
Admin rights in Microsoft Entra, Google Cloud and/or the Zoho API Console	Only admins can create sign-in apps and grant consent.
Access to the Ops Compass secure settings (secrets)	Where the client ID and secret are stored. They never reach anyone's browser.

Keep secrets secret
Never paste a client secret into chat, email, a ticket or a document. Enter it only in the Ops Compass secure settings.

Microsoft 365 (OneDrive, SharePoint, Word, Excel, PowerPoint)

1. Sign in to entra.microsoft.com as an administrator and open Identity › Applications › App registrations › New registration.
2. Name it “Ops Compass”. Under Supported account types choose Accounts in this organizational directory only (or any organization if you serve several tenants).
3. Under Redirect URI choose Web and enter https://<your Ops Compass address>/api/oauth/calendar/return. Select Register.
4. On the Overview page copy the Application (client) ID and the Directory (tenant) ID.
5. Open Certificates & secrets › New client secret, choose an expiry (24 months recommended) and copy the Value immediately — it is shown once.

6. Open API permissions › Add a permission › Microsoft Graph › Delegated permissions and add: openid, profile, email, offline_access, User.Read, Files.ReadWrite.All, Sites.ReadWrite.All, and Calendars.ReadWrite if you also use Calendar sync.
7. Select Grant admin consent for your organisation and confirm every permission shows a green tick.
8. In the Ops Compass secure settings add MICROSOFT_OAUTH_CLIENT_ID (client ID), MICROSOFT_OAUTH_CLIENT_SECRET (secret value) and MICROSOFT_OAUTH_TENANT (tenant ID; leave out to allow any organisation).

Optional: sensitivity labels
To lock protected files inside Microsoft 365 too, create Internal, Confidential and Restricted sensitivity labels in Microsoft Purview and add their label IDs as MICROSOFT_LABEL_INTERNAL, MICROSOFT_LABEL_CONFIDENTIAL and MICROSOFT_LABEL_RESTRICTED. Microsoft may bill this separately.

Tip
Set a calendar reminder a month before the client secret expires. When it expires, create a new one and replace MICROSOFT_OAUTH_CLIENT_SECRET.

Google Drive (Docs, Sheets, Slides, shared drives)

1. Sign in to console.cloud.google.com with your Google Workspace admin account and create (or choose) a project called “Ops Compass”.
2. Open APIs & Services › Library and enable the Google Drive API (and the Google Calendar API if you use Calendar sync).
3. Open Google Auth Platform › Branding (OAuth consent screen). Choose Internal so only your organisation can sign in, and fill in the app name, support email and your Ops Compass address as the home page.
4. Open Data access › Add or remove scopes and add .../auth/userinfo.email and .../auth/drive (plus .../auth/calendar.events for Calendar).
5. Open Clients › Create client › Web application. Under Authorised redirect URIs add https://<your Ops Compass address>/api/oauth/calendar/return and select Create.
6. Copy the Client ID and Client secret.
7. In the Ops Compass secure settings add GOOGLE_OAUTH_CLIENT_ID and GOOGLE_OAUTH_CLIENT_SECRET.

Good to know
If you chose External instead of Internal, Google requires app verification for the Drive scope before people outside your test users can connect.

Zoho WorkDrive (Writer, Sheet, Show, team folders)

1. Sign in to api-console.zoho.com (use your data centre's address, e.g. api-console.zoho.eu) as an administrator.
2. Select Add Client › Server-based Applications.
3. Name it “Ops Compass”, set the Homepage URL to your Ops Compass address and the Authorized Redirect URI to https://<your Ops Compass address>/api/oauth/calendar/return. Select Create.
4. Copy the Client ID and Client Secret.
5. In the Ops Compass secure settings add ZOHO_OAUTH_CLIENT_ID and ZOHO_OAUTH_CLIENT_SECRET.
6. If your Zoho account is outside the US data centre, also add ZOHO_ACCOUNTS_URL, for example https://accounts.zoho.eu, https://accounts.zoho.in or https://accounts.zoho.com.au.

Good to know
Zoho WorkDrive has no equivalent of sensitivity labels, so file protection for Zoho applies inside Ops Compass only.

Check it works

1. Open My Docs. The service's Connect button is no longer greyed out.
2. Select Connect, sign in with a work account and accept the permissions.
3. Your files appear. Open one with Edit live and save a small change — it updates in the original service.
4. Ask a colleague to do the same with their own account.

The Connect button is still greyed out.

Both the client ID and the client secret must be saved for that service. Check the names match exactly, then reload My Docs.

Sign-in says the redirect address doesn't match.

The redirect address in the service must be exactly https://<your Ops Compass address>/api/oauth/calendar/return — same spelling, https, no trailing slash. Add one for every address people use, e.g. your custom domain.

Microsoft says admin approval is required.

Return to API permissions in Entra and select Grant admin consent.

It worked, then stopped.

The client secret probably expired or was replaced. Create a new one and update the secret in Ops Compass; people may need to select Reconnect.

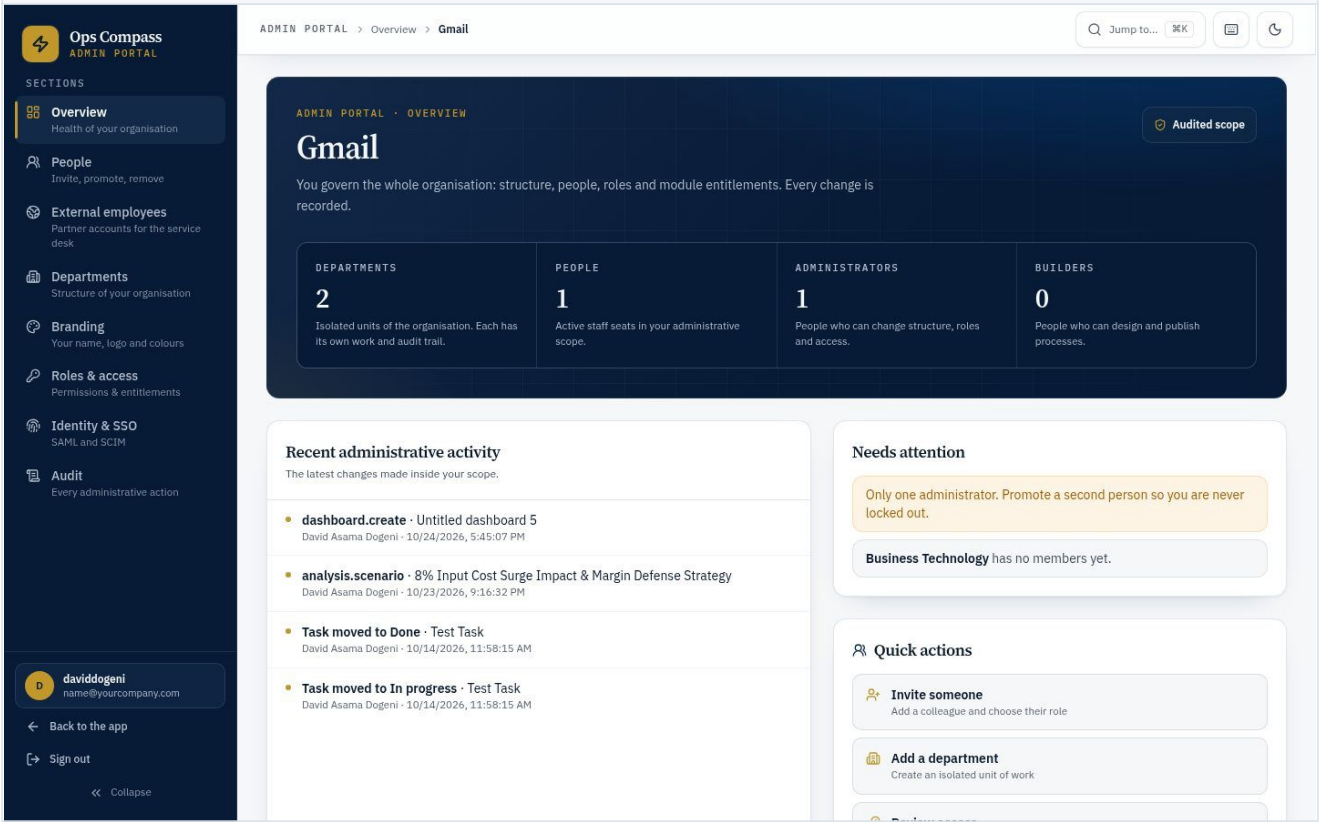
ADMINISTRATION

Admin portal overview

Where administrators govern structure, people, roles, branding and sign-on — every change is audited.

For: Department admin, Company admin · **Where:** /admin · 1 min read

/admin



The overview page

- Departments, people, administrators and builders in your scope.
- Recent administrative activity — the latest changes.
- Needs attention — for example “Only one administrator. Promote a second person so you are never locked out.”
- Quick actions — invite someone, add a department, review access.

Sections

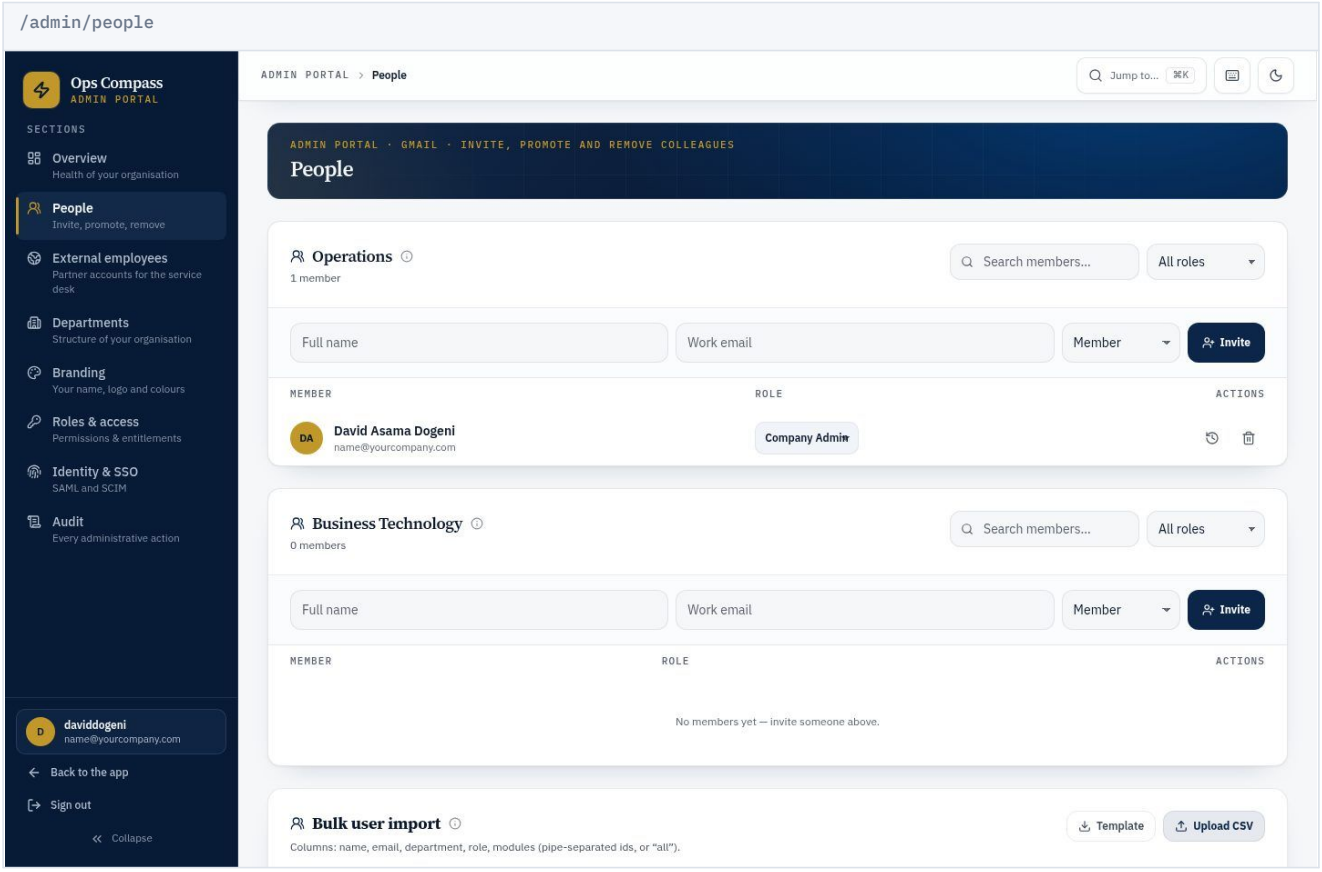
SECTION	WHO	PURPOSE
People	Dept and company admins	Invite, change roles, remove; bulk import.
External users	Dept and company admins	Partner accounts that only raise their own tickets (/partner).
Departments	Company admins	The structure of your organisation.
Branding	Company admins	Your name, logo and colours.
Roles & access	Dept and company admins	Permission matrix and module entitlements.
Identity & SSO	Company admins	SAML single sign-on and SCIM provisioning.
Audit	Dept and company admins	Every administrative action, searchable.

ADMINISTRATION

Inviting and managing people

Invite colleagues with a role, change roles, remove access, reset two-step verification and import many people from a spreadsheet.

For: Department admin, Company admin · **Where:** Admin portal › People · 2 min read



Invite someone

1. Find the department card.
2. Enter the full name and work email, pick a role and select Invite.
3. The person receives an invitation email that brings them back to Ops Compass to set a password.

> **Important**
> Removing a person's last membership ends their access. A deleted account cannot be restored — invite the person again if needed.

Invitations that expired

Invitation links stop working after a while (at most 24 hours). Company admins see who hasn't joined yet on the People page: "Invite expired" or "Invite not accepted yet" under their email, with when it was sent.

1. Open Admin › People and the person's department.
2. Select the envelope button next to their name (Resend invitation).
3. They receive a fresh link by email. Each resend is recorded in the audit trail.

- Inviting someone again who never accepted — for example after removing them — also sends a fresh link automatically.
- People who already accepted don't need an invitation: if they can't sign in, they can use Forgot password on the sign-in page.
- A new invitation can be sent once a minute per person. If emails don't arrive, check the person's spam folder; heavy use may need custom email (SMTP) set up in Supabase.

Reset two-step verification (lost phone)

Administrators must use two-step verification; other people may turn it on. If someone loses or replaces their phone, a company admin can clear their authenticator so they can set up a new one.

1. Confirm who is asking — by phone, video or in person. Never reset on the strength of an email or chat message alone.
2. Open Admin › People and select the access history button (clock icon) next to the person.
3. In Two-step verification, select Reset and confirm.
4. They are signed out everywhere. At their next sign-in they use their password, and administrators are asked to set up a new authenticator straight away.

- Only company admins can reset, and never for their own account — ask another company admin.
- Platform administrators are reset by the platform operator, not from a company's Admin portal.
- Each reset is recorded in the audit trail.

Bulk user import

Upload a CSV with the columns name, email, department, role and modules. Roles can be CompanyAdmin, DeptAdmin, Builder or Member. Modules is a pipe-separated list (for example workspace|calendar|forms) or “all”. The import checks every row and lists problems before anything is created.

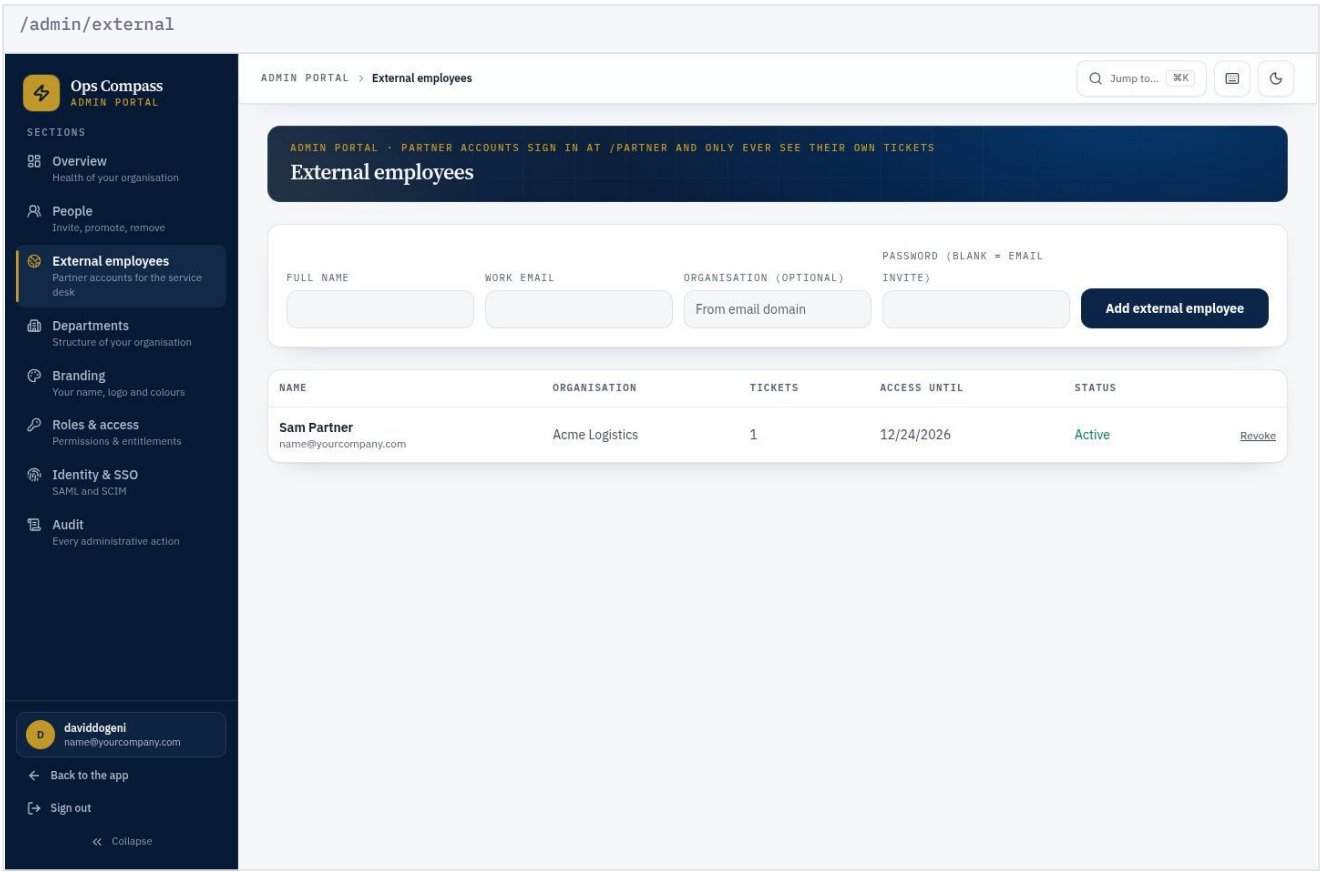
NAME	EMAIL	DEPARTMENT	ROLE	MODULES
Ada Obi	ada.obi@yourcompany.com	Operations	Member	workspace|calendar|forms

ADMINISTRATION

External users and collaborators

Two ways to let people from outside in: partner desk accounts that only raise their own tickets, and collaborators from approved domains who use your help desk and process portal with limited scopes and an expiry date.

For: Department admin, Company admin · **Where:** Admin portal › External users; Admin portal › Roles & access › External collaboration · 2 min read



Which one should I use?

	EXTERNAL USER	EXTERNAL COLLABORATOR
Where you set it up	Admin portal › External users	Admin portal › Roles & access › External collaboration
Where they sign in	/partner	/desk (help desk) and /processes (process portal)
What they can do	Raise and follow only their own service requests	Only what you tick: Service desk, Forms, Tasks, Comments, Workflows, Files
Email domain	Any	Must be on your approved domain list
Best for	Customers who just log tickets	Clients and partners who fill in your processes or work with a department

Good to know
The same email cannot be both. If a client needs your processes as well as the help desk, invite them as an external collaborator with Forms and Service desk ticked.

External users (partner desk accounts)

1. Enter the full name, work email and, optionally, the organisation.
2. Leave the password blank to send an email invitation, or set one to hand over yourself.
3. Select Add external user. They sign in at /partner and only ever see their own tickets.
4. The list shows each account’s organisation, tickets raised, access end date and status. Select Revoke to end access immediately.

External collaborators (clients and partners)

1. Add the client's email domain to the approved list (for example client.com). Invitations to other domains are refused.
2. Select Invite external user, choose the department they work with and tick their scopes. Service desk lets them raise requests; Forms lets them fill in that department's published processes.
3. Leave the password blank to email an invitation, or set one and share it yourself. Either way a real account is created straight away.
4. They sign in at /desk or /processes. Pending changes to Active the first time they sign in.
5. Change scopes or the expiry date at any time. Revoke or remove them to end access at once — the system checks on every action.

Important
A department only takes help-desk requests from outside if it allows it: Service Desk › Manage desk › Request form › Partner organisations › "Accept requests from outside the organisation". Otherwise the client sees that department as not accepting requests.

Good to know
Collaborators never see your queues, other people's submissions, reports or settings. They see only the people in the department they were invited to.

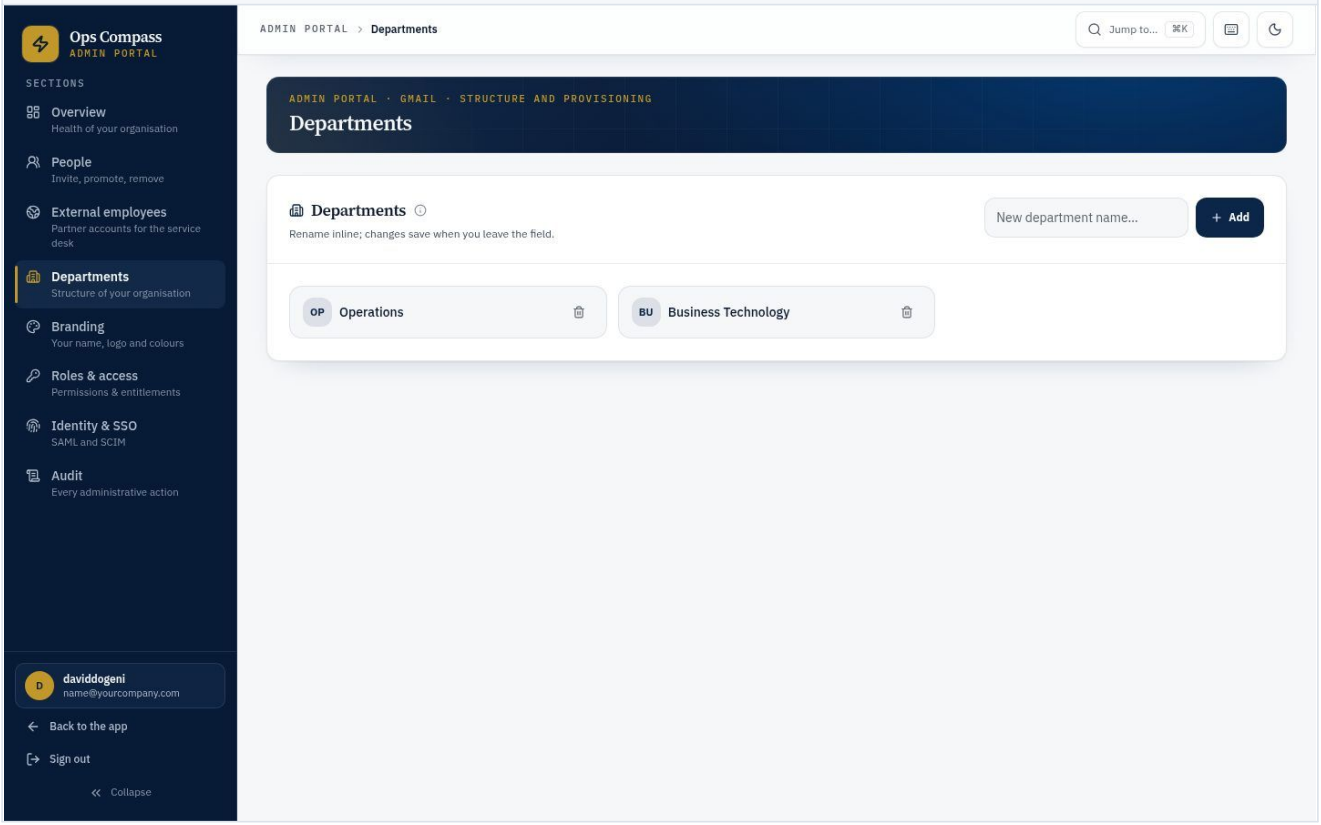
ADMINISTRATION

Departments

Create, rename and remove the departments that structure your organisation.

For: Company admin · **Where:** Admin portal › Departments · 1 min read

/admin/departments



Manage departments

1. Type a name in “New department name” and select Add.
2. Rename inline — the change saves when you leave the field.
3. Remove a department with the bin icon. Move its people first.

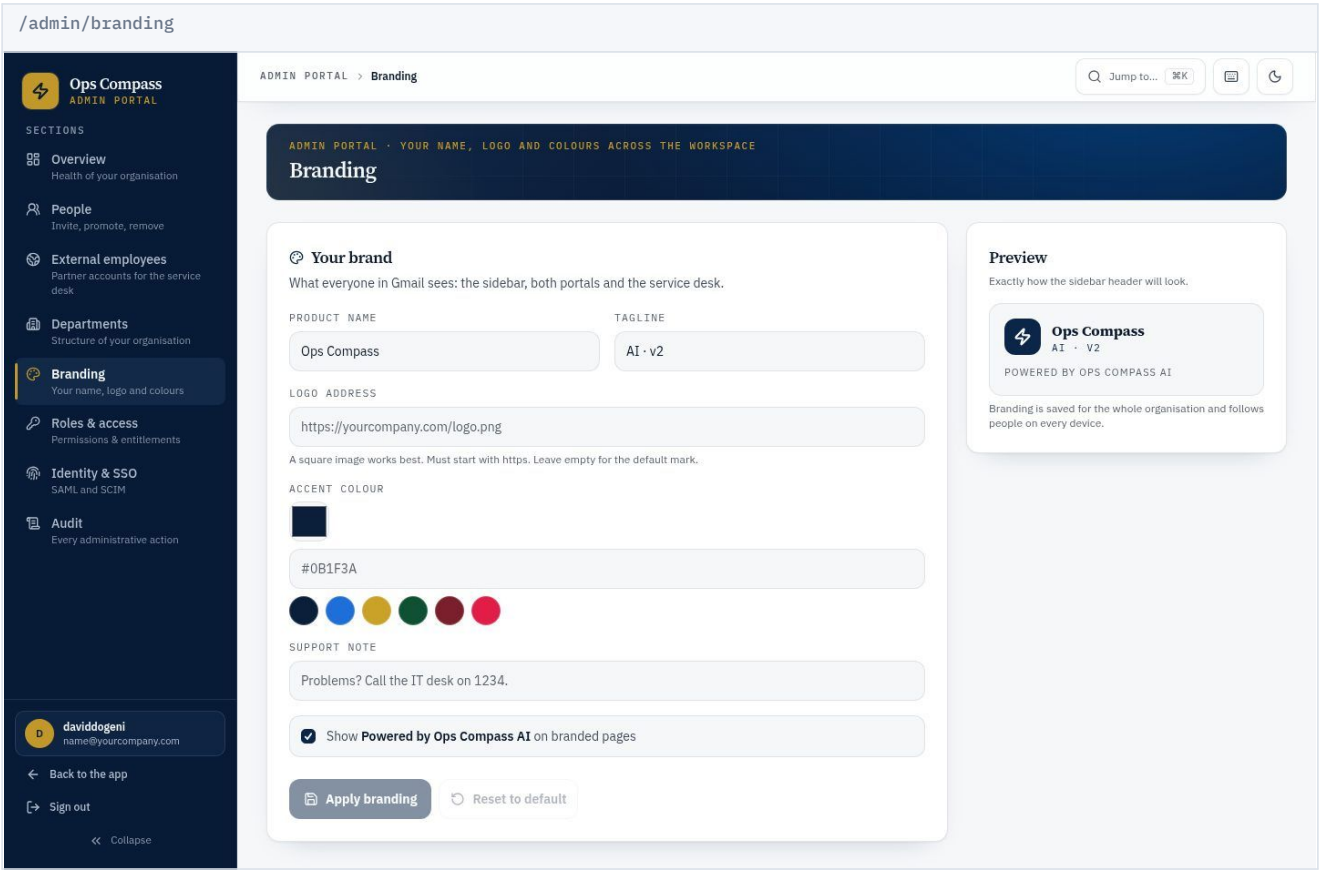
Each department is an isolated unit with its own work, settings, service desk and audit trail.

ADMINISTRATION

Branding (white-label)

Put your own name, tagline, logo, accent colour and support note across the workspace and portals.

For: Company admin · **Where:** Admin portal › Branding · 1 min read



Set your brand

1. Enter the product name and tagline everyone will see.
2. Paste the logo address — a square image works best and it must start with https.
3. Pick an accent colour from the presets or enter a colour code.
4. Add a support note (for example “Problems? Call the IT desk on 1234.”) and choose whether to show “Powered by Ops Compass AI”.
5. Check the live preview and select Apply branding. Reset to default restores the original look.

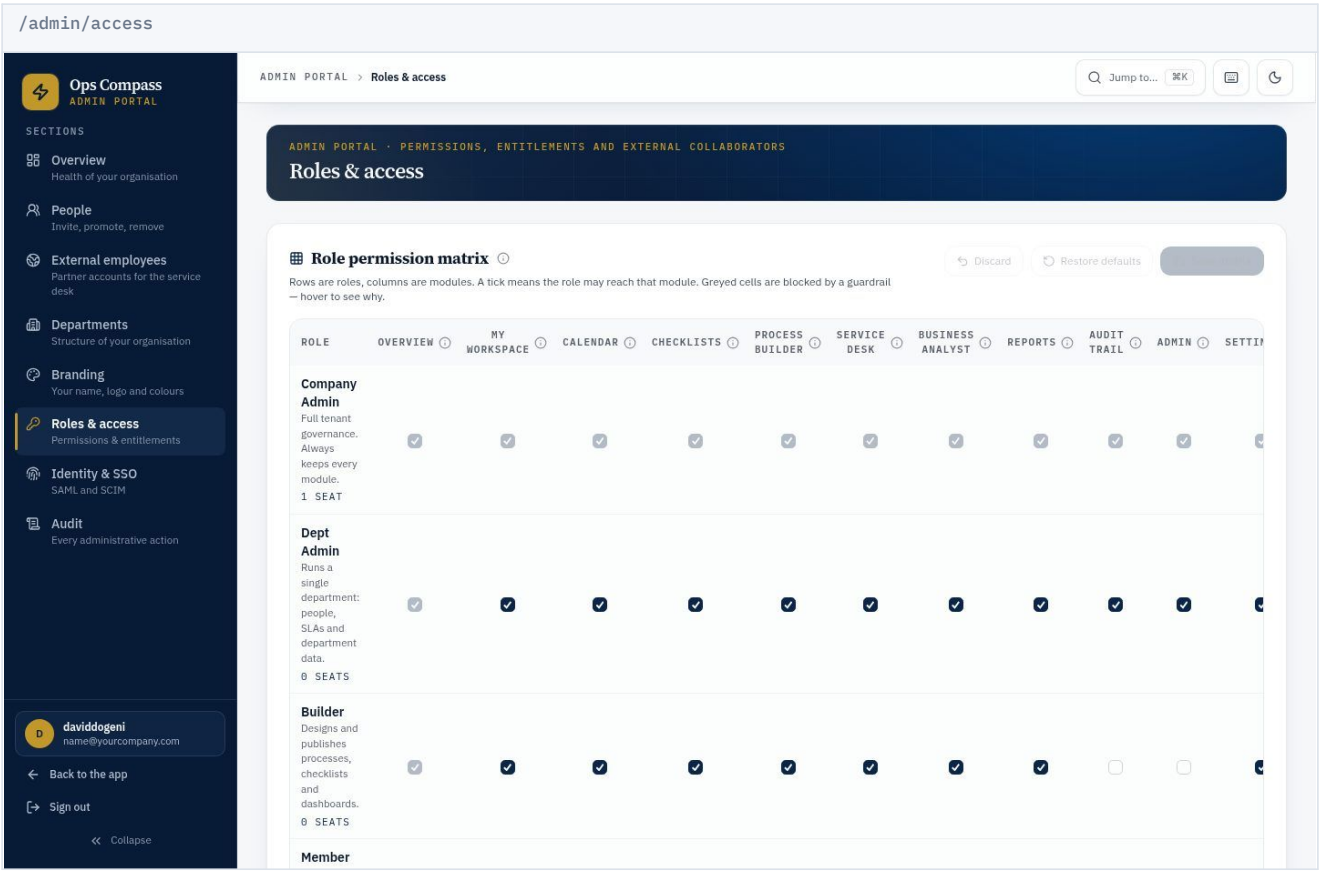
Good to know
Branding is saved for the whole organisation and follows people on every device.

ADMINISTRATION

Roles and module access

See the role permission matrix and switch individual modules on or off for each person.

For: Department admin, Company admin · **Where:** Admin portal › Roles & access · 1 min read



Role permission matrix

Rows are roles and columns are modules. A tick means the role may reach that module. Greyed cells are blocked by a guard-rail — hover to see why. Company admins always keep every module so the organisation can never be locked out.

Module access per person

1. Open a person’s access (from People or Roles & access).
2. Switch modules on or off for their membership.
3. Save. Their menu updates on next load; switched-off modules show “not enabled for you” if opened directly.

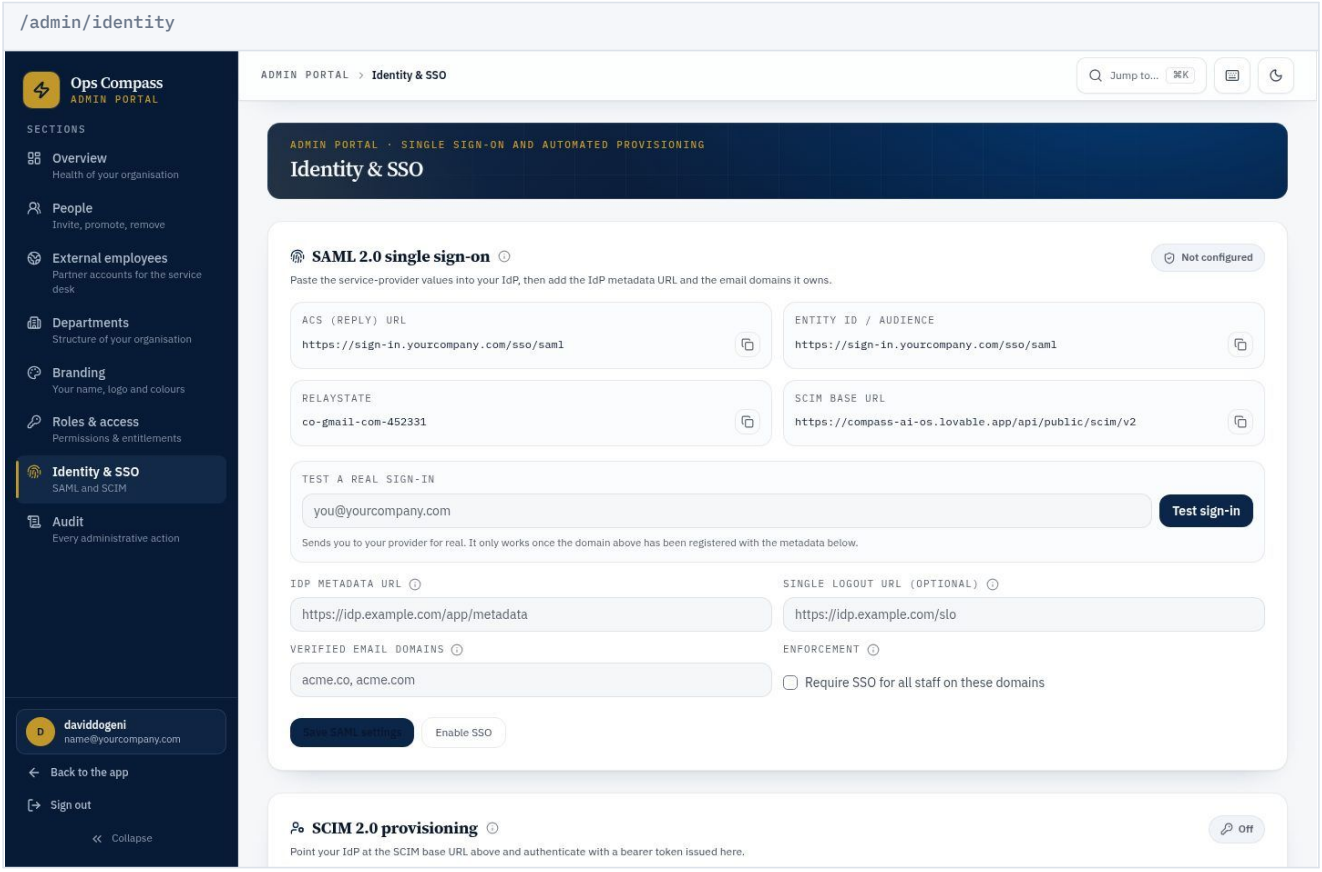
Good to know
Module access can only narrow what a role allows — it never adds capabilities.

ADMINISTRATION

Identity, single sign-on and provisioning

Connect your identity provider with SAML 2.0, enforce SSO for your domains and provision accounts with SCIM.

For: Company admin · **Where:** Admin portal › Identity & SSO · 1 min read



Set up SAML single sign-on

1. Copy the ACS (Reply) URL, Entity ID / Audience and RelayState from the panel into a new SAML application in your identity provider (Microsoft Entra ID, Okta, Google Workspace and others).
2. Copy your provider's metadata URL back into "IdP metadata URL", add the single logout URL if you have one, and list the email domains you own.
3. Save, then use "Test a real sign-in" with your own work email.
4. When the test succeeds, select Enable SSO. Optionally tick "Require SSO for all staff on these domains".

Important
Keep at least one administrator able to sign in with a password until SSO is proven, so a provider misconfiguration cannot lock everyone out.

SCIM provisioning

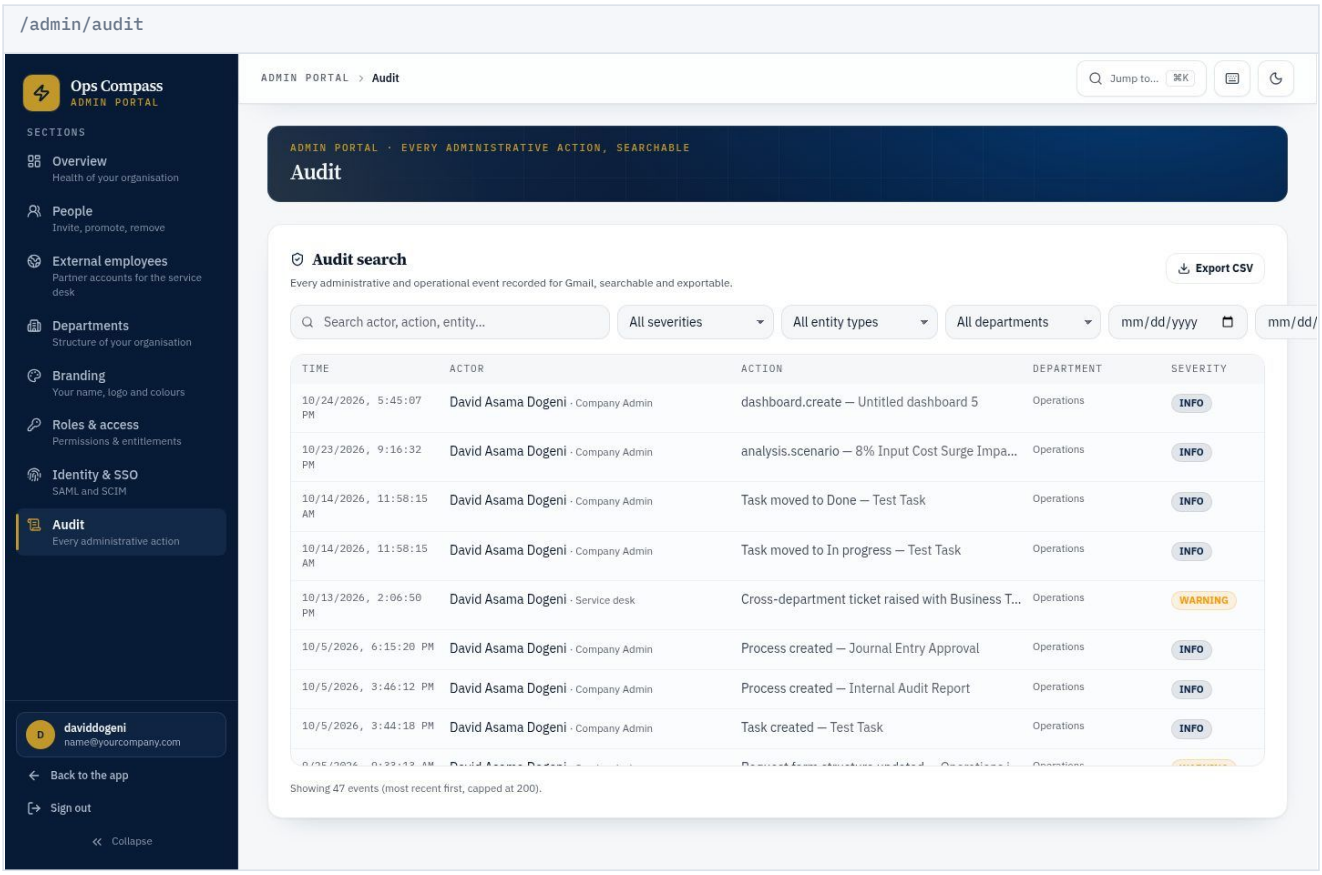
Point your identity provider at the SCIM base URL shown on the page and authenticate with the bearer token issued there. People added or removed in your provider are then created or deactivated in Ops Compass automatically.

ADMINISTRATION

Admin audit

Search every administrative and operational event in your scope and export it for auditors.

For: Department admin, Company admin · **Where:** Admin portal › Audit · 1 min read



Use the audit search

The same tamper-evident ledger as the Audit Trail module, focused on administration. Filter by severity, entity type, department and dates, search by actor or action, and select Export CSV. The most recent 200 events are listed.

CHAPTER 9

Security & privacy

How data and AI are protected.

SECURITY & PRIVACY

How your data is protected

Tenant isolation, access checks, encryption, retention and the evidence trail — in plain language.

For: Every role · 1 min read

Controls that protect you

CONTROL	WHAT IT MEANS FOR YOU
Tenant isolation	Every request is checked against your real membership, and the database enforces row-level security on every table. One company can never read another's data.
Department roles	Your permissions come from the role you hold in the department you are working in.
Server-side checks	Hidden buttons are not the only protection; the server and database refuse anything your role does not allow.
Encrypted transport and storage	Data travels over HTTPS and is stored encrypted by the hosting platform.
Private credentials	Connection keys and calendar links stay on the server and never reach a browser.
Session policy	Sessions end when the browser closes and after 30 minutes idle, unless you choose to stay signed in.
Breached-password blocking	Passwords found in known data breaches are refused.
Tamper-evident audit	Every action is attributed by the database and hash-chained.
Automatic retention	Old operational data is removed nightly according to retention rules; the audit chain is kept.

Good to know
Ops Compass is built to support ISO 27001, SOC 2, NDPA/NDPR and GDPR programmes. Certification of your organisation still requires an independent assessment.

What you can do

- Use a unique, long password or your company sign-on.
- Only tick "Keep me signed in" on trusted devices, and sign out on shared computers.
- Never share booking manage links, calendar links or push tokens.
- Report anything unexpected (a reset email you did not request, a ticket you cannot explain) to your administrator.

SECURITY & PRIVACY

AI and confidentiality

How Buddy and the Business Analyst use AI, what data is sent and the guard-rails that apply.

For: Team member, Builder, Department admin, Company admin · 1 min read

How AI is used

- AI requests are made by the server for features you request or enable, such as a Buddy message, analyst insight or generated form. Meeting audio processing requires host admission and explicit consent from every active attendee; an invitation alone never starts listening.
- Only the data needed for that request, within your company and permissions, is included.
- AI calls are metered and logged for cost and accountability.
- AI suggestions are proposals. Actions that change data run through the same permission checks as if you clicked the button.

> **Tip**
> Do not paste passwords, card numbers or other secrets into Buddy or the analyst. Administrators can tune how assertive the analyst is under Settings › AI guard-rails.

CHAPTER 10

Troubleshooting

Answers to common problems and a glossary.

TROUBLESHOOTING

Troubleshooting and FAQ

Quick answers to the problems people hit most often.

For: Every role · 3 min read

Signing in and access

It says “Invalid login credentials”.

The email or password is wrong. Use “Forgot password?” to set a new one. If you no longer receive emails, ask your administrator whether your account still exists — deleted accounts need a new invitation.

I was signed out unexpectedly.

Sessions end after 30 minutes without activity or when the browser closes. Tick “Keep me signed in” on a trusted device to stay signed in.

A module is missing from my menu.

Either your role does not allow it or your administrator has switched it off for you. Opening it directly shows “not enabled for you”. Ask a company admin to review Roles & access.

I cannot see a department I work with.

Ask a company admin to add you to that department in Admin portal › People, then switch to it from the top bar.

The reset email never arrived.

Check spam and wait a few minutes. If your company’s email domain is not yet connected, emails may not be delivered — your administrator can reset access.

Everyday work

The other department cannot see the ticket I raised.

Tickets raised through Across departments or the Help portal go straight to the receiving queue. Ask them to open Service Desk › Across departments › Inbound and refresh; queues also refresh automatically every few seconds.

The live status says Paused or Offline.

Paused only affects who-is-online presence; select “Try again”. Offline means your device has no connection — stay on the page until it is back so your changes can be saved.

My KPIs and dashboards say there is nothing to measure.

They are built from published processes. Ask a Builder to publish a process in Process Builder and submit at least one response.

The Business Analyst shows no numbers.

It only shows real data. An administrator needs to connect a system or upload a file under Data & KPIs.

Settings shows measures as “No data yet”.

Those measures have no readings yet. They are not failing — connect a source to start scoring them.

My export did not download.

Some browsers block downloads inside preview windows. Try again from the published address, or allow downloads for the site.

Will my Calendar, Meeting notes and agenda survive a refresh?

Saved Ops Compass calendar entries, written notes and agendas are stored on your account. Complete the save before refreshing; the selected view, week, meeting and notes tab reopen. Unsaved notes and agenda changes trigger a leave-page warning. Cancel it and save first. You may still need to sign in again after idle expiry.

Buddy says an agenda point was missed, but we discussed it.

Coverage is based on the supplied notes or transcript, not on the planned agenda. Add the missing discussion to Written notes, save and refresh the summary. Check the quoted evidence; AI coverage is a review aid, not a definitive attendance or discussion record.

Why has Buddy not joined my Teams meeting?

Check the status on the meeting's prep page. “Waiting in the Teams lobby” means the organiser must admit Buddy in Teams. “Buddy wasn't admitted from the lobby” means nobody admitted it in time — send it again. “Couldn't join” usually means the link was incomplete, it's a channel meeting, or your Teams tenant blocks external participants; ask your Microsoft 365 administrator. Recording must also be allowed in Buddy administration.

Still stuck?

Raise a request in the Help portal with your own IT or operations team, including what you were doing, what you expected and a screenshot. Administrators can check the Audit for exactly what happened.

TROUBLESHOOTING

Glossary

The words used across Ops Compass, explained.

For: Every role · 1 min read

Terms

TERM	MEANING
Audit trail	The tamper-evident record of every action.
Booking link	A shareable page where visitors pick a free slot on your calendar.
Buddy	The AI assistant available on every page.
CSAT	Customer satisfaction — the share of satisfied ratings on closed tickets.
Cadence	How often a connected system is refreshed.
Deflection	A problem solved by a knowledge article instead of a ticket.
Delegation	Handing a task to a colleague in any department.
Escalation ladder	Who is pulled in, and when, as a ticket approaches or passes its target.
External collaborator	A guest from an approved partner domain with limited scopes.

TERM	MEANING
Hash chain	Linking each audit entry to the one before it so tampering is detectable.
Incident	Something broken or degraded.
KPI / measure	A number tracked against a target.
Module access	Per-person switches that narrow which modules someone can open.
Priority (P1–P4)	Critical, High, Medium, Low — set from impact and urgency.
Process	A digital SOP: a form with workflow, automations and access.
Run	One completion of a checklist template.
Service request	A standard ask from the service catalogue.
SLA	Service-level agreement — the promised response and resolution times.
SSO	Single sign-on through your company identity provider.
Tenant	Your company’s sealed space on the platform.