



User guide: how to do an advanced search

Roles: All

Process overview: This process allows a member to search for other members. It allows for searching using more fields than the basic search, but the outcome is the same: the ability to view a member's profile. This search can be made using at least one of the following: member number, location, name, postcode, date of birth, gender, email address, membership status, role. The results of this search can also be sorted by a chosen field.

This user guide also shows how to search for suspended members. This option is only available to Commissioners.

Please note: The 'My members' button allows you to see all people within your hierarchy. If you have more than one role, you may need to change the role in the 'My roles' dropdown box to access the appropriate hierarchy information; for example, if you are an Assistant District Commissioner and a Cub Scout Leader, you will need to have the 'District' role selected to view the District, or the 'Cub Scout Leader' role selected to see the other Pack Leaders and Section Assistants in your Pack.

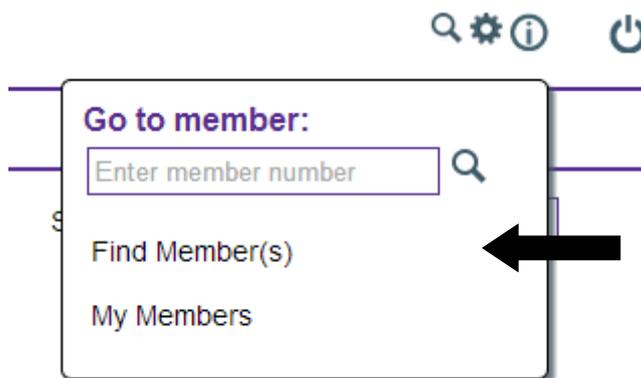
The screenshot shows the COMPASS user interface. At the top left is the COMPASS logo. To its right is a 'My Roles' dropdown menu currently set to 'County Commissioner', with a black arrow pointing to it. Further right is a 'Welcome Back, Richard' message and a search icon. Below the logo is a navigation bar with links for 'My Scouting', 'Joining', 'Training', 'Messaging/Reports', and 'My Profile'. The main content area is titled 'My Messages' and contains a search bar, a 'Sort By' dropdown set to 'Priority', and a list of message filters. The filters include 'All Message Types' (0), 'You' (66), 'All Message Types' (0), 'Alert' (0), 'Administration' (0), 'News' (0), and 'Task' (0). A 'Show All Archived Messages' button is located at the bottom left of the message list area.

Process: advanced search

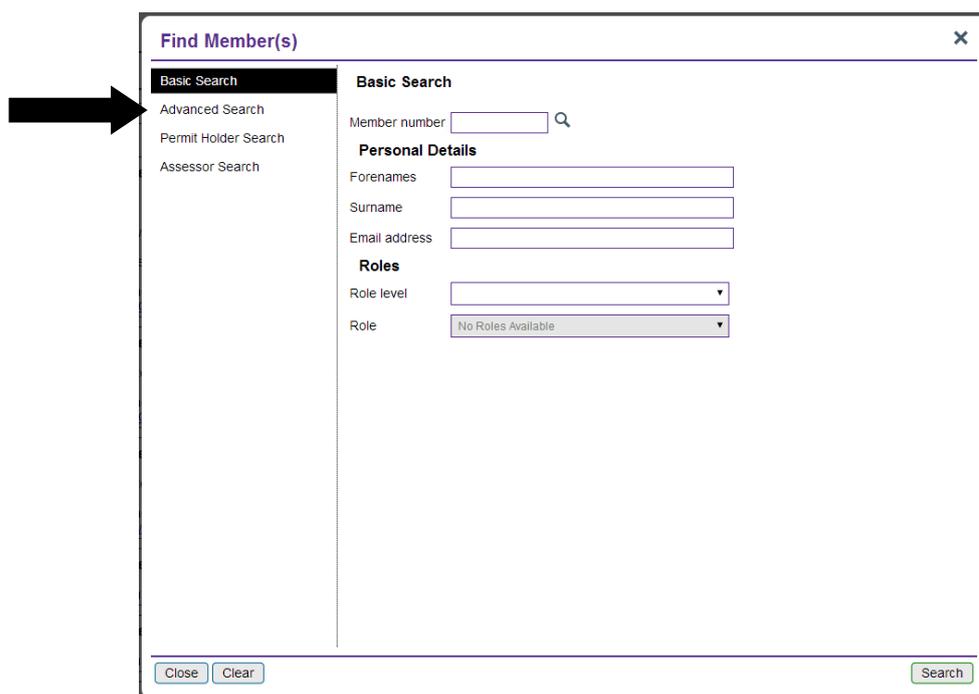
- 1 Click on the magnifying glass icon at the top right of the homepage.



- 2 A menu will appear under the magnifying glass. Click the 'Find member(s)' option.



- 3 A popup window will appear titled 'Find member(s)'. There will be a list of options at the left hand side of the window. Click the 'Advanced search' option.



- 4 If you know the membership number of the person you are searching for, type it into the 'Member number' field at the top and click the magnifying glass. You will then be taken to the member's profile.

Find Member(s)

Basic Search
Advanced Search
Permit Holder Search
Assessor Search

Member number

Location

Country Show all at and below this level
 Show all at this level only
District Show all below this level only
Group

Personal Details

Forenames Surname
 Exact match? Exact match?
Postcode Date of Birth
Gender
Email address

Membership

Active members Active members outside my hierarchy
 Inactive members New members Suspended members

Roles

Role level
Role

Close Clear Search

- 5 Use the dropdown menus in the second section to refine the search by location. Depending on your role and access level, some fields of the location search will be automatically completed, and you will not be able to change them.

Find Member(s)

Basic Search
Advanced Search
Permit Holder Search
Assessor Search

Member number

Location

Country Show all at and below this level
 Show all at this level only
District Show all below this level only
Group

Personal Details

Forenames Surname
 Exact match? Exact match?
Postcode Date of Birth
Gender
Email address

Membership

Active members Active members outside my hierarchy
 Inactive members New members Suspended members

Roles

Role level
Role

Close Clear Search

- 6 Use the 'Personal details' section to search using a member's name, postcode, date of birth, gender or email address.

The screenshot shows a search interface titled "Find Member(s)". On the left, there are four search categories: "Basic Search", "Advanced Search" (highlighted), "Permit Holder Search", and "Assessor Search". The "Advanced Search" section is expanded, showing several filter categories: "Location" (Country, South West, Avon, District, Group), "Personal Details" (Forenames, Surname, Postcode, Date of Birth, Gender, Email address), "Membership" (Active members, Active members outside my hierarchy, Inactive members, New members, Suspended members), and "Roles" (Role level, Role). A black arrow points from the left towards the "Personal Details" section.

- 7 The following section is titled 'Membership'. Here you will be able to search by membership status.

This screenshot is identical to the one above, showing the "Find Member(s)" search interface. In this view, a black arrow points from the left towards the "Membership" section, which includes radio buttons for "Active members", "Active members outside my hierarchy", "Inactive members", "New members", and "Suspended members".

- 8 The following section is 'Roles'. Use the drop down menu to select the level of the role within the hierarchy and then choose the specific role you are looking for.

The screenshot shows the 'Find Member(s)' search interface. On the left, there are search options: 'Basic Search', 'Advanced Search' (highlighted), 'Permit Holder Search', and 'Assessor Search'. The main form is divided into several sections: 'Location' with dropdowns for Country (England), South West, Avon, District (Gordano), and Group (1st Backwell); 'Personal Details' with input fields for Forenames, Surname, Postcode, Date of Birth, Gender, and Email address; 'Membership' with radio buttons for Active members, Active members outside my hierarchy, Inactive members, New members, and Suspended members; 'Roles' with a 'Role level' dropdown and a 'Role' dropdown (currently showing 'No Roles Available'); and 'Sort' with three dropdown menus for sorting criteria. At the bottom, there are 'Close', 'Clear', and 'Search' buttons. A large black arrow points from the left towards the 'Roles' section.

- 9 The final section is titled 'Sort'; you may need to scroll the menu to find it. Use the dropdown menus to sort the search results according to different criteria.

This screenshot is identical to the one above, showing the 'Find Member(s)' search form. In this version, a large black arrow points from the left towards the 'Sort' section, which contains three dropdown menus for sorting criteria.

10 When you are ready to start the search, click the 'Search' button at the bottom right of the window.

The image shows a web-based search interface titled "Find Member(s)". On the left, there is a sidebar with search options: "Basic Search", "Advanced Search" (which is selected and highlighted in black), "Permit Holder Search", and "Assessor Search". The main area contains several sections of search criteria:

- Location:** Includes dropdown menus for "Country" (England), "South West", "Avon", "District" (Gordano), and "Group" (1st Backwell). There are also radio buttons for "Show all at and below this level", "Show all at this level only", and "Show all below this level only".
- Personal Details:** Includes input fields for "Forenames", "Surname", "Postcode", and "Date of Birth" (with a calendar icon). There are checkboxes for "Exact match?" and a "Gender" dropdown menu.
- Membership:** Includes radio buttons for "Active members", "Active members outside my hierarchy", "Inactive members", "New members", and "Suspended members".
- Roles:** Includes a "Role level" dropdown menu and a "Role" dropdown menu currently showing "No Roles Available".
- Sort:** Includes a "Sort by" section with three dropdown menus.

At the bottom of the window, there are "Close" and "Clear" buttons on the left, and a "Search" button on the right. A large black arrow points directly to the "Search" button.

Process name: how to search for a suspended member.

Roles: Regional Commissioner, County Commissioner and District Commissioner.

Please follow steps 1 to 6 above.

- 1 In the 'Membership' section, choose 'Suspended members' from the options provided.

Please note: You may need to scroll across to see all available options in this section.

Find Member(s) ✕

Basic Search
Advanced Search
Permit Holder Search
Assessor Search

Advanced Search

Member number

Location

Country
 Show all at and below this level
 Show all at this level only
District Show all below this level only
Group

Personal Details

Forenames Surname
 Exact match? Exact match?
Postcode Date of Birth
Gender
Email address

Membership

Active members
 Inactive members New members Suspended members

Roles

Role level
Role

Sort

Sort by



- 2 When you are ready to start the search click the 'Search' button at the bottom right of the window.

Find Member(s) ✕

Basic Search
Advanced Search
Permit Holder Search
Assessor Search

Advanced Search

Member number

Location

Country
 Show all at and below this level
 Show all at this level only
District Show all below this level only
Group

Personal Details

Forenames Surname
 Exact match? Exact match?
Postcode Date of Birth
Gender
Email address

Membership

Active members
 Inactive members New members Suspended members

Roles

Role level
Role

Sort

Sort by

