User guide: how to do a basic search

Roles: All.

Process overview: This process allows a member to search for other members within the hierarchy in order to view relevant details, then make updates (where the user has appropriate access), and check information. To make a search, at least one piece of information is required from the following: membership number, name, email address, role. The basic search will search using only these fields – use 'Advanced search' for further search options. Members are only able to search for other members within their branch of the hierarchy.

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 showing to view the District, or the 'Section' role showing to view the section.
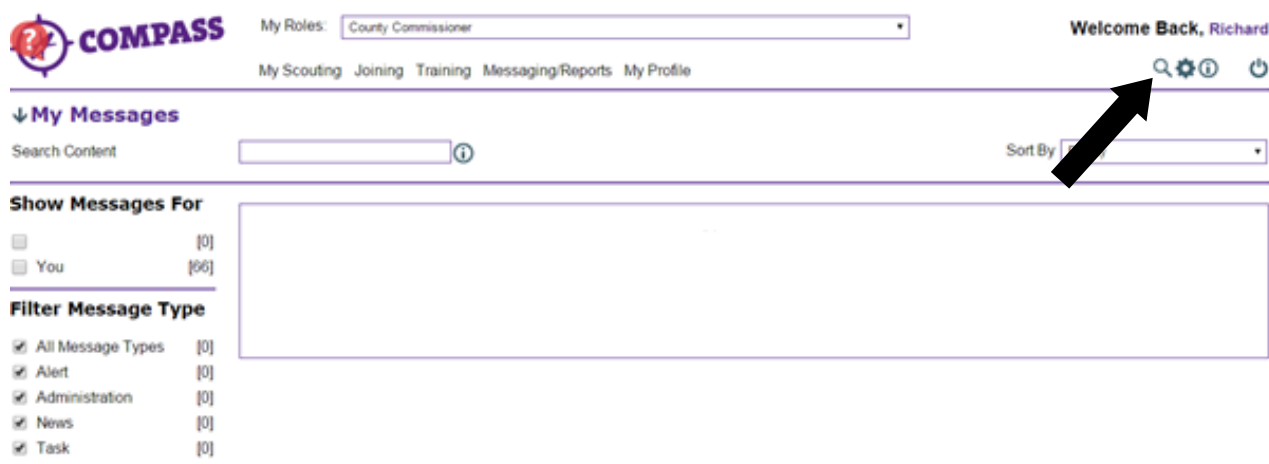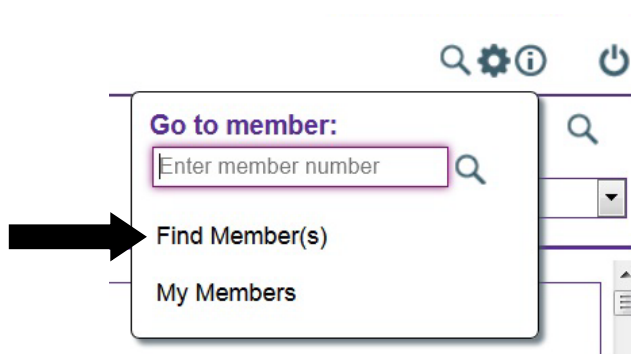

Useful links

- How to do an Advanced search
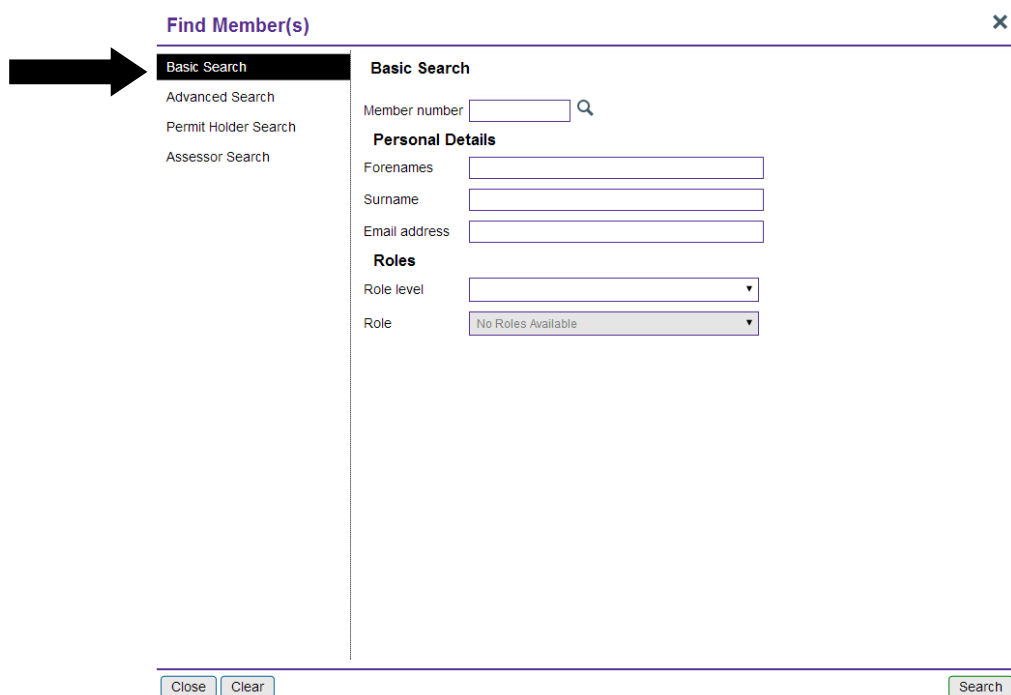
Process: how to do a basic search

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

2 A menu will appear under the magnifying glass. Click on 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. Make sure 'Basic search' is highlighted; if it is not, click it.

4   You will be on the 'Basic search' page. If you know the membership number of the person you are searching for, type it into the 'Member number' field and then click the magnifying glass to go directly to that member's profile.

Please note: You do not need to complete all fields to search for a member.

5   Use the 'Personal details' section to search using a member's name and/or email address.

Click 'Search' to be taken to the search results.

6 Use the 'Roles'section to search for members by role. Use the dropdown menus to select the appropriate role level within the hierarchy followed by the particular role you are looking for, then click the 'Search' button.

7 If your search has been successful, you will be taken to the 'Search results' page where you will see a list of results relevant to your search.

8 You can select an individual record to view online or export the details to a PDF or CSV (Excel) file.

To do this, select the members you wish to export by ticking the boxes at the left hand side and then click the 'Export options' button at the bottom left.

9 Choose your preferred file type for the export by clicking on the 'Export' button next to that option.

10 You can then choose which information you would like to export into the file. Select the information by using the tick boxes at the right hand side. Click 'OK' to complete the export.