



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.

COMPASS

My Roles: County Commissioner

Welcome Back, Richard

My Scouting Joining Training Messaging/Reports My Profile

↓ My Messages

Search Content

Sort By Priority

Show Messages For

- ☐ [0]
- ☐ You [66]

Filter Message Type

- ☒ All Message Types [0]
- ☒ Alert [0]
- ☒ Administration [0]
- ☒ News [0]
- ☒ Task [0]

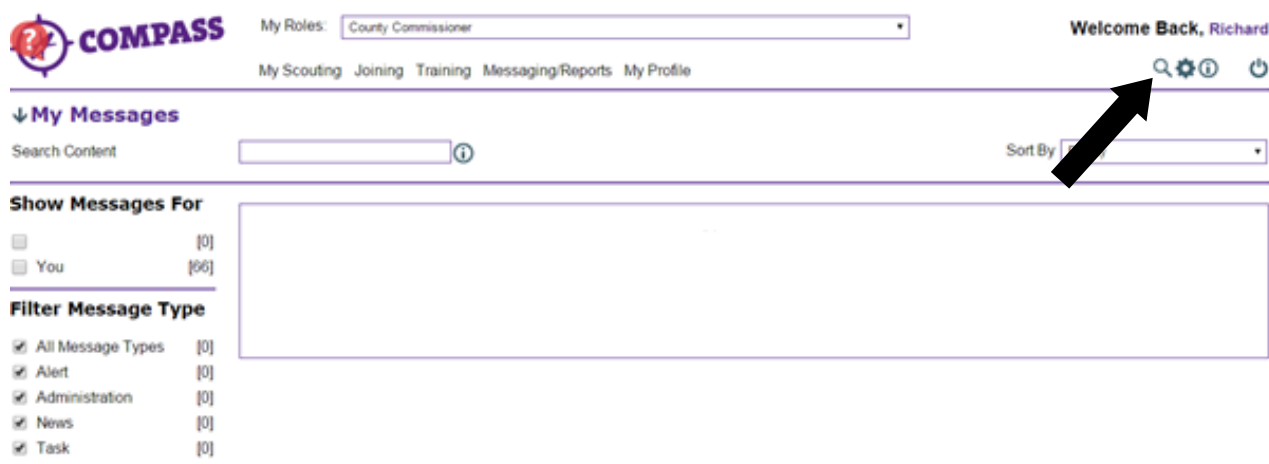
Show All Archived Messages

Useful links

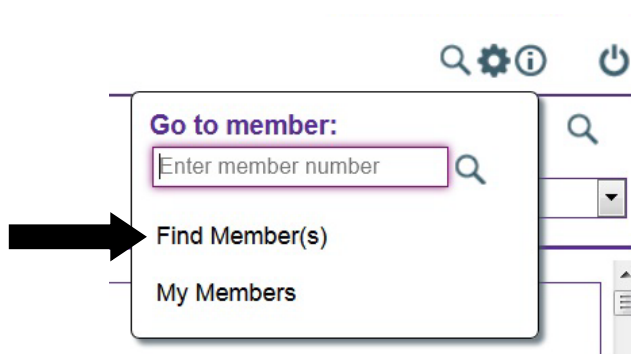
- How to do an [Advanced search](#)

Process: how to do a basic search

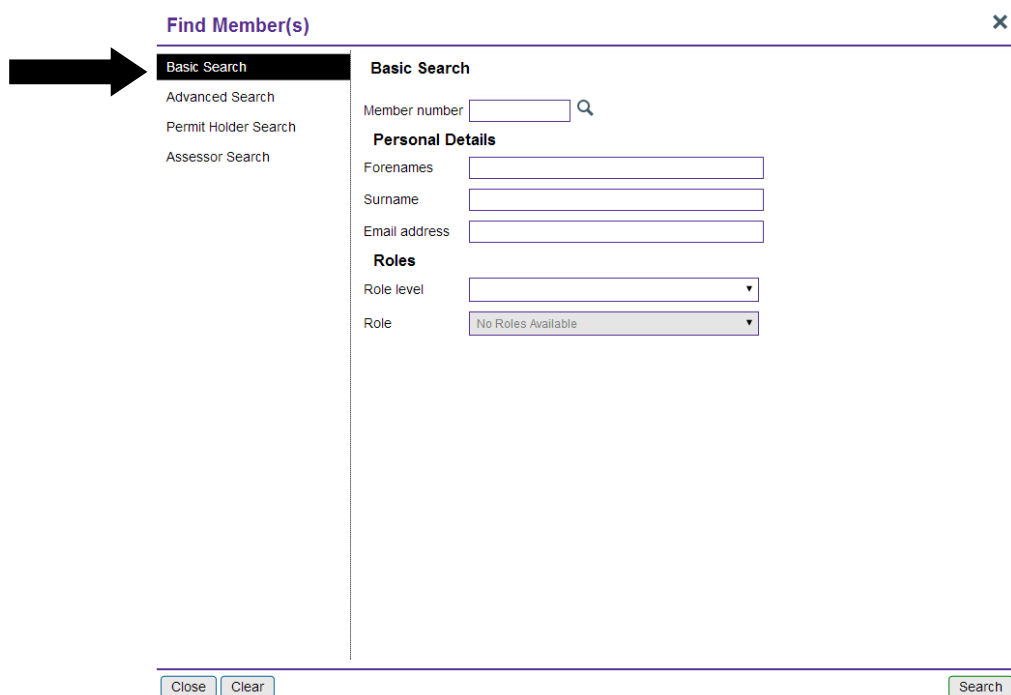
- 1 Click the magnifying glass icon at the top right of the homepage.



- 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.

Find Member(s) ×

Basic Search
Advanced Search
Permit Holder Search
Assessor Search

Basic Search
Member number  
Personal Details
Forenames
Surname
Email address
Roles
Role level
Role

Close Clear



Search

- 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.

Find Member(s) ×

Basic Search
Advanced Search
Permit Holder Search
Assessor Search

Basic Search
Member number 
Personal Details
Forenames
Surname
Email address 
Roles
Role level
Role

Close Clear

Search 

- 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.

Find Member(s) ×

Basic Search

Advanced Search

Permit Holder Search

Assessor Search

Basic Search

Member number

Personal Details

Forenames

Surname

Email address

Roles

Role level

Role

Close

Clear

Search

- 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.

COMPASS

My Roles:

Welcome Back, Richard

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[Joining](#)
[Training](#)
[Messaging/Reports](#)
[My Profile](#)

Search Results (2 Records Found)

You searched for:

Search Type: Basic Search

Forenames: rupert

Surname: carter

Location: At and below England/East of England/Essex

<input checked="" type="checkbox"/>	▼ No	▼ Name	▼ Location	▼ Role
<input checked="" type="checkbox"/>	11793261	Rupert Carter	Monday Night Scout Troop @ 950th Chelmsford	Section Leader (Pre-Prov)
<input checked="" type="checkbox"/>	11794098	Rupert Carter	1035th Chelmsford	Group Scout Leader (Pre-Prov)

Messaging

Export Options

Amend 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.

The screenshot shows the COMPASS web interface. At the top, there's a logo and navigation links. A search bar shows 'County Commissioner' as the role. Below the search bar, it says 'Search Results (2 Records Found)'. A summary of the search criteria is shown: 'Search Type: Basic Search', 'Forenames: rupert', 'Surname: Carter', and 'Location: ... and below England/East of England/Essex'. Below this is a table with two records. The first record is '11793261 Rupert Carter' with the role 'Section Leader (Pre-Prov)'. The second record is '11794098 Rupert Carter' with the role 'Group Scout Leader (Pre-Prov)'. Arrows point to the checkboxes in the first column of the table and the 'Export Options' button at the bottom left.

<input checked="" type="checkbox"/>	Name	Location	Role
<input checked="" type="checkbox"/>	11793261 Rupert Carter	Monday Night Scout Troop @ 950th Chelmsford	Section Leader (Pre-Prov)
<input checked="" type="checkbox"/>	11794098 Rupert Carter	1035th Chelmsford	Group Scout Leader (Pre-Prov)

Buttons: Messaging, Export Options, Amend Search

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

The screenshot shows the 'Export Options' dialog box. It has two options: 'Export To PDF' and 'Export To CSV'. Each option has an 'Export' button next to it. A 'Cancel' button is at the bottom. An arrow points to the 'Export' button for the CSV 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.

The screenshot shows the 'Select Columns For Export to CSV' dialog box. It lists several columns: 'Membership Number', 'Title', 'Forenames', 'Surname', 'Address', and 'Address Line1'. Each column has a tick box on the right side. All tick boxes are checked. An arrow points to the tick box for 'Address Line1'. At the bottom, there are 'OK' and 'Cancel' buttons.