



User guide: how to search for an Activity Assessor or Nights Away Adviser

Roles: All adult members

Process overview: This process allows a member to search for an Activity Assessor or Nights Away Adviser for any given activity. The member can choose the activity, and the category/type of the permit, if one exists (e.g. B2 Waters). The member can also choose to search by location (eg a specific County or District.)

The search will return all the members of Scouting who have the relevant Assessor role within the location searched. This will allow the member to contact one or more Assessors. The degree of information available is dependent on whether the permit holder is accessible to the member. The member can send a message (email, Compass alert, SMS text or any combination of the three) to the selected permit holder(s) using the Compass system, or export the search results.

If you are an Assessor or Nights Away Adviser and happy to be contacted via Compass please ensure that your email address and/or your phone number is visible to members outside your hierarchy. See the user guide for '[Editing your visibility](#)' for instructions on how to do this.

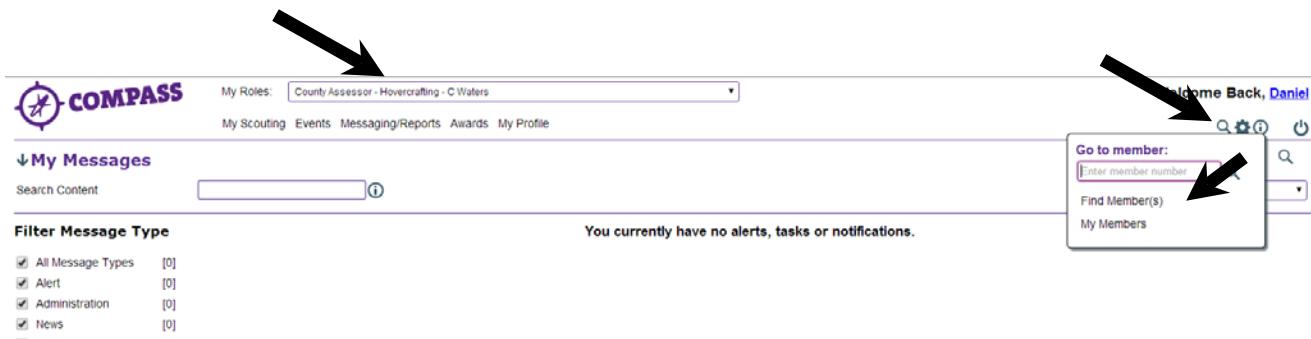
Please Note: There are some known issues with the search results displayed for certain activities. Please read the notes contained here ([Results displayed for searches to find Activity Assessors, Nights Away Advisers and Permit Holders](#)) for more information, and check carefully before contacting people. This applies to:

- Kayaking and canoeing.
- Hillwalking and mountain biking.
- Nights Away.
- Climbing and abseiling.
- Ice climbing.

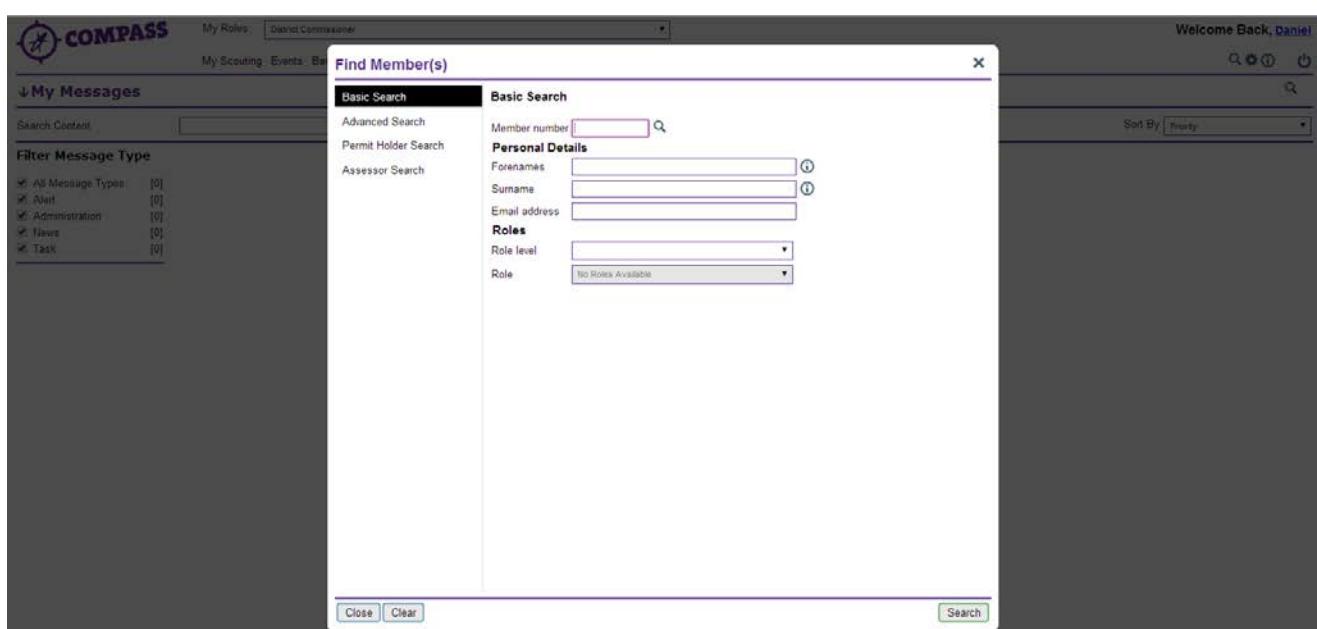
Process: how to search for an Activity Assessor or Nights Away Adviser

- 1 After you have logged into Compass, hover over the 'Available search options' button (this looks like a magnifying glass) to bring down the search menu. Select 'Find member(s)'.

Please note: What you are able to see in your search results will depend on the role that you currently have selected in the 'My roles' box



- 2 This will open a new pop-up window with a menu at the left hand side. From this menu select 'Assessor Search' to view the 'Permit Assessor Search' form.



- 3 The 'Permit Assessor search' form will allow you to search using different criteria. Select your required search criteria and click on the 'Search' button at the bottom right hand corner of the form. You can enter as much or as little information as you wish. The more you enter, the more refined your search will be.

The criteria are as follows:

- **Activity**—This dropdown menu lists the main activities within Scouting that require a permit, for example 'Bell Boating'.
- **Category** – Use this dropdown menu to look for specific categories within an activity permit. For example 'Bell Boating' includes the categories of 'B1 Water' and 'B2+ Waters'. Note that the search will return all Permit Assessors at and above the level that you pick. For example, if 'B1 Water' is selected, the search will return anyone who can operate on B1 waters, including people who hold a 'B2+ Waters' permit.

- **Location** – This section allows you to search for Assessors or Nights Away Advisers by location. Note that Assessors are appointed at Area/County/Scottish Region level and above. If you select a District in an Assessor search, no results will be returned. Nights Away Advisers are appointed at District level and above.
 - **Review before date** – This option allows you to search for an Assessor who has a review before a certain date. This is only likely to be relevant if you are responsible for managing or supporting Assessors in your location.
- 4 The search results will be returned as a table with the headings ‘Name’, ‘Activity’, ‘Category’, ‘County (location)’, and ‘Review date’.

The names of Assessors who are within your own location, or who have chosen to make themselves visible outside of their normal area of Scouting, will be in blue text and underlined.

The names of Assessors who are outside of your own location, or who have not made themselves visible to you, will be displayed in black text.

If you wish to change or refine your search, click on the ‘Amend search’ button to go back to step 3.

<input checked="" type="checkbox"/> Name	Activity	Category	County [Location]	Review_date
<input checked="" type="checkbox"/> Albert Terence Hinton	Hill Walking	Terrain 2 Summer	East Sussex	02 December 2018
<input checked="" type="checkbox"/> Andrew James Young	Hill Walking	Terrain 2 Winter	Oxfordshire	04 April 2017
<input checked="" type="checkbox"/> Antony David Rose	Hill Walking	Terrain 2 Summer	Hampshire	04 April 2017
<input checked="" type="checkbox"/> Benjamin John Bradley	Hill Walking	Terrain 2 Summer	Hampshire	26 July 2019
<input checked="" type="checkbox"/> Brendan James Goswell	Hill Walking	Terrain 2 Summer	Royal Berkshire	01 January 2016
<input checked="" type="checkbox"/> Catherine Anne Day	Hill Walking	Terrain 2 Summer	Surrey	01 January 2016

- 5 You can send a message to all those listed in the Assessor search, including Assessors listed in black text.
- Using the tick boxes at the left hand side, select those Assessors you wish to message, then click on the 'Messaging' button at the bottom left of the screen. You can then send them a message using email, Compass alert, SMS text message or any combination of the three.

Search Results (199 Records Found)

You searched for:

Name	Activity	Category	Type	Expiry	County [Location]	District
Adam David Godwin	Climbing and Abseiling	Natural Top Rope	Leadership	20 Mar 2016	Norfolk	
Adam David Godwin	Climbing and Abseiling	Natural Top Rope	Leadership	20 Mar 2016	Norfolk	Southern Norfolk
Adam David Osborne	Climbing and Abseiling	Lead Climbing	Leadership	18 Feb 2017	Norfolk	Northern Norwich
Adam David Wilson	Climbing and Abseiling	Lead Climbing	Leadership	01 Feb 2017	Durham	Chester-le-street
Alan David Miles	Climbing and Abseiling	Lead Climbing	Leadership	30 Dec 2019	Staffordshire	Stafford.
Alexander Michael Glass	Climbing and Abseiling	Lead Climbing	Leadership	30 Sep 2016	Avon	Wansdyke
Alexander Sinclair Stewart Roddie	Climbing and Abseiling	Natural Top Rope	Leadership	08 Nov 2019	Lincolnshire	Skegness Spilsby And District
Amanda Dawn Wilson	Climbing and Abseiling	Lead Climbing	Leadership	25 Jun 2017	Durham	Teesdale
Amy Elizabeth Shelley	Climbing and Abseiling	Natural Top Rope	Leadership	31 Aug 2019	Hertfordshire	Hemel Hempstead
Andrew Brown	Climbing and Abseiling	Lead Climbing	Leadership	27 Mar 2019	Durham	
Andrew Brown	Climbing and Abseiling	Lead Climbing	Leadership	27 Mar 2019	Durham	Chester-le-street
Andrew Deville	Climbing and Abseiling	Lead Climbing	Leadership	22 Nov 2015	North Yorkshire	
Andrew Deville	Climbing and Abseiling	Lead Climbing	Leadership	22 Nov 2015	North Yorkshire	South Craven
Andrew David Bradley	Climbing and Abseiling	Lead Climbing	Leadership	14 Mar 2017	Gt. Manchester West	Stretford
Andrew Gareth Dolan	Climbing and Abseiling	Lead Climbing	Leadership	15 Sep 2018	Surrey	Woking

Messaging Export Options Amend Search

- b. Complete the message details, including the subject, message type (email/Compass Alert/SMS (text)), message body, and any attachments (if sending by email).

If you are sending an email, your name and the main email address on your Compass record will be shown as the sender. If you are sending a Compass alert or an SMS (text) message, your details will not be shown automatically as the sender so you will need to include this information in the body of the message or they will not know who has sent it.

Welcome Back, Ade

Search Results (199 Recipients Selected)

Compose Message

Required fields

Subject: [enter a message subject]

Message type(s): Email Alert SMS

Message body: [enter the body of the message here]

Email attachments (Max 10mb per file):

Back to Results

Click to 'Preview message and send' at the bottom right to preview your message before sending.

- c. Check your message and click 'Send' to send, or 'Edit message' to make any amends.

The screenshot shows the 'Message Previews' section of the Compass software. It includes three preview boxes: 'Email Preview' showing a message from 'Adam Nicholas Jollans, County Commissioner <compass.test@aol.com>' about County Camp; 'Alert Preview' showing an alert for '17 July 2015' with the same message; and 'SMS Preview' showing the same message in a mobile format. At the bottom, there are buttons for 'Back to Results' (with a black arrow pointing to it), 'Edit Message' (with a black arrow pointing to it), and 'Send Messages' (with a green arrow pointing to it).

Click on 'Back to results' to return to your search results. (Using your browser's back button will not return you to your search results.)

6. If you wish to export the results of your search, click the 'Export options' button at the bottom left of the screen and choose whether to export the data in PDF or CSV (Excel) format.

Select which fields you want to appear in your export, and click 'OK'. Confirm the data protection message.

The first dialog, 'Select Columns For Export to PDF', lists fields with checkboxes: Membership Number (checked), Title (unchecked), Forenames (checked), Surname (checked), Address (checked), and Address Line 1 (unchecked). The second dialog, 'Before you finish', contains a message about data protection and a link to 'Read about your data protection responsibilities here.' Both dialogs have 'OK' and 'Cancel' buttons.

The requested file will download to your computer (CSV) or open in a new browser window (PDF.)

7. By clicking on the name of an Assessor highlighted in blue, you will be taken to their profile. If you have clicked on an Assessor who is normally outside of your location Scouting, but who has chosen to make themselves visible to others, you will see only those contact details that they have chosen to share with you.

If the Assessor is within your area of Scouting you will see more of their contact details; however, the specific details will differ depending on which role you have selected in the 'My roles' selector on the homepage.

8. This completes the procedure for 'How to search for an Activity Assessor or Nights Away Adviser'. To search for a new Assessor, click on the 'Available search options' button in step 1. To return to the homepage click on the 'Compass' logo at the top left of the page.

The screenshot shows the Compass homepage. It features the 'COMPASS' logo with a compass icon, a 'My Roles' dropdown set to 'District Commissioner', a 'Welcome Back, Daniel' message, and navigation links for My Scouting, Events, Badges, Joining, Training, Messaging/Reports, Awards, and My Profile. An arrow points upwards from the bottom of the page towards the logo.