# How to search for a Member: Video Transcript

Searching for a Member is often the starting point for carrying out most other tasks. It’s therefore really useful to know how to do this.

Searching in Compass can be undertaken in a number of ways, and the best one to use will depend on whether you are looking for a particular person, a group of people in a particular area, or a group of people who have a particular role. This video will show you how to use four of the search options available in Compass: the quick search function; My Members search; basic search; and advanced search function. We won’t cover how to search for an assessor or permit holder in this video.

The more details you have about the person you are searching for beforehand, the easier it is to locate them.

Make sure that you have selected the right role from the ‘My Role’ drop down at the top. The role you choose will affect who you will be able to search for and see, so it’s really important to make sure you have selected the right role.

Click on the ‘Find Member’ icon, which looks like a magnifying glass.

This will show you three options; a box in which you can enter a Membership number to search straight away, ‘Find Members’ and ‘My Members’.

The first tool we’re going to look at is the ‘My Members’ button.

Click on the ‘My Members’ button.

This will show you a list of all of the adult Members at your level of the hierarchy and below. E.g. If you are a GSL it will show you all Members with Group roles (e.g. Group Admins, OHs) and those in Sections (e.g. SLs.) If you are a Section Leader, it will show you only those Members with roles within your Section.

You can filter the results using the headings at the top of each column by clicking on the funnel icon and checking only the options you want displayed.

If the person you are looking for is in this list, click on their name or Membership number (highlighted in purple) which will take you to their record.

This method will take you straight to your Members and is useful if you want to find multiple Members at once, or have limited details of the person you’re looking for. However, depending on your role, it may return a large number of results, so other methods of searching may be more preferable.

The next method you can use to search is the ‘quick search’, which uses someone’s Membership number.

To do this, click on or hover over the magnifying glass.

Type the Membership number of the person you’re trying to find in the text box.

Click the magnifying glass to the right, or press the enter key.

This will take you directly to the Members record. This search only works with exact membership numbers, so you must have this information.

If you aren’t taken to the Member’s record, you may find that an error message is returned. This could be because the person’s role(s) are not in your level of the hierarchy, therefore you don’t have access to their record. It could also be because the Membership number is incorrect, or the Member doesn’t have any active roles in Scouting. If you want to search for an inactive Member, you need to use the Advanced Search. We’ll come on to this in a minute.

If you don’t know the person’s Membership number but you know their name, email address or role level (e.g. Group or District) then you can search for them using the basic search.

To do this, click on the magnifying glass again, and then click on ‘Find Member(s)’.

A popup window will appear, with a list of options on the left hand side of the window.

Make sure Basic Search is highlighted. If it’s not, click it.

Use the boxes in the ‘Personal Details’ section to enter the details of the person you are looking for. E.g. name. The more information you add, the more refined the results will be. The forename search will look for both full and preferred names.

Double check you’ve entered the details correctly and then click ‘Search’

The results will be returned in a table, similar to when we used the ‘My Member’ search.

As before, you can filter the results using the headings at the top of each column.

If the person you are looking for is in this list, click on their name or Membership number which will take you to their record. If their name is not highlighted then you cannot access their record as they are outside your hierarchy. You can take down their name and location and get in touch via other methods, for example their County office.

If you don’t have the person’s name, or you want to search using different criteria, then you can use the ‘Advanced Search’ option.

You can get to this in the same way we got to the ‘Basic Search’. Click on the magnifying glass and then on ‘Find Member(s)’

In the popup box which appears, select ‘Advanced Search’ this time.

Use the drop down menus and text boxes on the page to select your search criteria. You can enter as much or as little information as you wish.

The first section is ‘Location’. Depending on your role and access level, some of the levels will be automatically selected, and so you won’t be able to change them.

The second section is personal details.

In here you can enter information including a members name, postcode, date of birth, gender or email address.

In the Membership section you can select the membership status of the member you are searching for.

This is useful if you want to search for an inactive Member (someone who doesn’t have any current roles in Scouting.) You might want to use this to write to them.

The ‘Active Members outside my hierarchy’ field might be helpful to find someone in an area you are considering going on camp.

The next section is Roles.

Here you can pick the role level according to the hierarchy and choose the particular role you are looking for.

The last section is ‘Sort’, you may need to scroll down to view it. You can use the drop down menus to prioritise certain information on the results page, for example whether you want to sort the results by surname or role.

Once you have entered all of your search criteria, double check the information carefully, then click ‘search’.

As with Basic Search, your results will be returned in a table which you can filter as you wish.

Clicking on the Member’s name or Membership number will take you to their record.

If you can’t find the person you are looking for, it is possible that they are not accessible to you in your selected role, or there may be a data issue. Your line manager might be able to help you get in touch and the Information Centre may be able to assist with identifying the issue.

This concludes the video on how to search. It is worth trying a few searches to familiarise yourself with the system.

More information on searching, including how to search for permit holders or activity assessors, can be found on the Compass support site.