

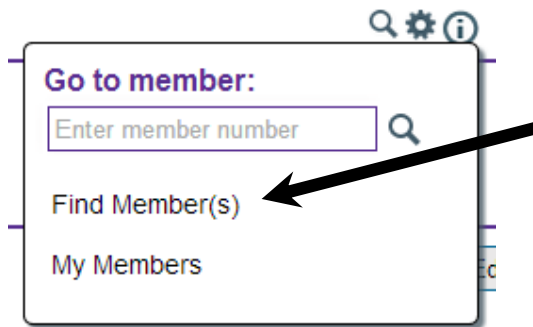


Process name: Find a Permit Holder

Roles: All members

Process overview: This process allows a member to search for a permit holder for any given activity. Members will be able to see those within their hierarchy (ie a DC can see everyone within their District), the search will also pick up people who have set their visibility setting to allow others to find them. A summary of the permit holders, what permits they have and their District and County will appear. For those within your hierarchy you can select their record to access their full details, for those outside of your hierarchy this identifies their District and County to enable you to make contact outside of the Compass system.

1. After you have logged into Compass, click on the “Available Search option button” (this looks like a magnifying glass). This will bring down the search menu select Find member(s) option



2. This will open a new pop-up window with a menu on the left hand side. On this menu select “Permit Holder Search” option. This will then load the Permit holders search form

Find Member(s)

Basic Search

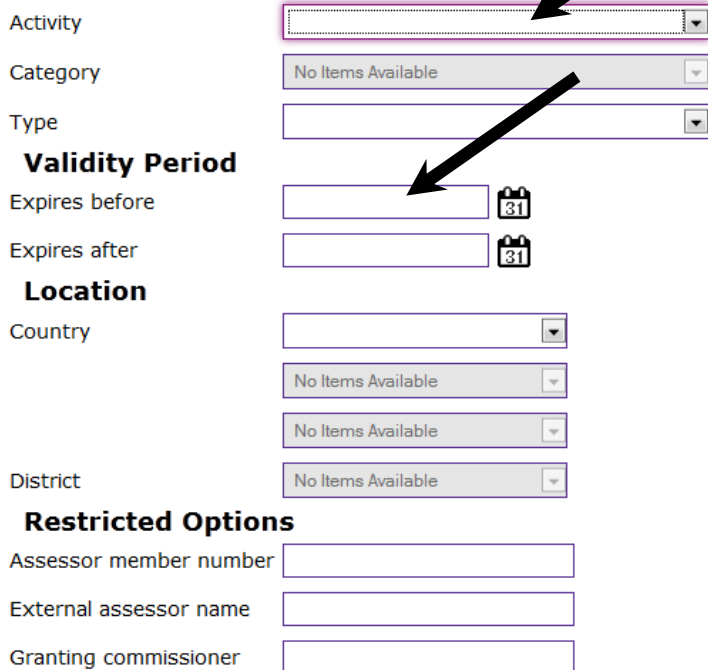
Advanced Search

Permit Holder Search

Assessor Search

3. The permit Holder Search form will allow you to search on different criteria's for example location of permit or expires before date.

Permit Holder Search



The screenshot shows a web form for searching permit holders. It is divided into several sections: **Permit Holder Search**, **Validity Period**, **Location**, and **Restricted Options**. The **Permit Holder Search** section includes dropdown menus for Activity, Category (showing 'No Items Available'), and Type. The **Validity Period** section has text input fields for 'Expires before' and 'Expires after', each with a calendar icon showing the number 31. The **Location** section includes a Country dropdown and three more dropdowns, all showing 'No Items Available'. The **Restricted Options** section has three text input fields for 'Assessor member number', 'External assessor name', and 'Granting commissioner'. Two black arrows point to the 'Activity' dropdown and the 'Expires before' field.

These Criteria's are as follows:

- **Activity** – This is a dropdown menu which lists the main Activities that need a permit for Scouting
- **Category** – This dropdown menu is used to look for specific Categories within an activity permit for example Bell Boating has the categories of B1 Water and B2+ waters.
- **Type** – This dropdown allows you to search for the following options, Leadership, Personal and Supervisory permit holders.
- **Expires before** – This allows you to find Permit holders that have permits expiring before a certain date.
- **Expires After** – This allows you to find Permit holders that have permits expiring after a certain date.
- **Location** – This section allows you to choose to locate permit holders in counties and districts.
- **Assessor member number** – This allows you to find a specific assessor by their membership number.
- **External Assessor name** – This allows you to find a specific assessor by their membership name.
- **Granting Commissioner** – This allows you to search for a County commissioner who can grant permits by name

Select your required search criteria and click on the “Search” button

4. Once Compass has performed its search it will return you results as a table.

You searched for:

Search Type: Permit Holder Search
Permit Activity: Hovercrafting
Location: Scouts Association

<input checked="" type="checkbox"/>	Name	Activity	Category	Type	Expiry	County [Location]	District
<input checked="" type="checkbox"/>	George Demo	Hovercrafting	C Waters	Supervisory	20 May 2015	Gt. London North East	Chingford

5. On this table you will see the Permit Holders name, activity, category, permit type, expiry, county and district.

Clicking on the members name link will take you to the members Permit profile tab

The screenshot shows the Compass user interface. At the top left is the COMPASS logo. To its right is a 'My Roles' dropdown menu set to 'District Commissioner'. Further right is a 'Welcome Back, Daniel' message and a search icon. Below this is a navigation bar with links: My Scouting, Events, Badges, Joining, Training, Messaging/Reports, Awards, My Profile. The main content area shows the user's name '00955388 George Demo' and a set of tabs: Personal Details, Roles, Permits (selected), Training, Awards, Youth Badges/Awards, Event Invitations, Emergency Details, Communications, Visibility, Disclosures. Below the tabs is a 'Permits' section with a 'Show Expired' checkbox. A table lists permits with columns: Activity, Category, Type, Restrictions, Expires, and Options. The first row shows 'Hovercrafting' under Activity, 'C Waters' under Category, 'Supervisory' under Type, '20 May 2015' under Expires, and a 'Revoke' button under Options.

Activity	Category	Type	Restrictions	Expires	Options
Hovercrafting	C Waters	Supervisory		20 May 2015	Revoke

6. This completes the procedure for the Permits – How to find a Permit Holder. To search for a new permit holder click on the Available Search options button in step 1