



Portalbuzz

Adding existing member to new club or as Member-at-Large

Persons residing in communities where an affiliated club does not exist may become members-at-large upon application to and approval of the Regional Director and the Secretary General. Members-at-large shall pay International dues as determined by the International Council annually and shall not have voting rights in the International Association of Y's Men's Clubs. Members that wish to remain on a particular club's roster should not be listed as members-at-large.

1. Login to Portalbuzz as a Regional Administrator.
2. On navigation bar on left, choose Admin, then Headquarters management screen.

Portalbuzz Administration

Below are the administrative functions which you have access to. Click the "Select" button to the right of the name to access the selected function.

Members

- Add/edit/delete members (Administrator, Secretary, Users Administrator)
Make changes to your member roster

General administration

- Headquarters management screen (Headquarters Administrator)**
Manage users, clubs, officers etc.
- Officers (Administrator, Secretary, Users Administrator)
Add, edit, delete club officers for the current and upcoming year.

3. Select "Search".

Australia Management

Current view: HQ Management

- Search**
(members, clubs, manage officers of clubs)
- Add new member
(for people not in database)
- Change log
(tracks the changes for membership, officers, and invoices)

4. Click "New Search".

Organization search
Current view: [HQ Management](#) > [Search](#) > Search Results

You searched for
OUType: District Save as private Save as public

Record count
4

Your options
Export to Excel New search

club name officers submitted club status

5. Switch the Members/Clubs tab to "Members". The darker tab is the selected one.

Organization search
Current view: [HQ Management](#) > [Search](#)

Members Clubs

Search

Available search terms

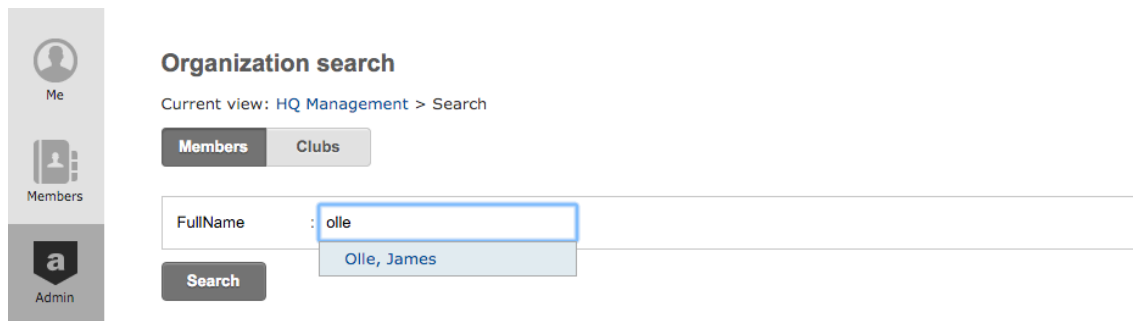
- Drop down the list to see the available search terms (this is not necessary to do the search but will help you familiarise yourself with the available functions).

The screenshot shows the 'Organization search' page. On the left is a vertical navigation bar with 'Me', 'Members', and 'Admin' options. The main content area has a title 'Organization search', a breadcrumb 'Current view: HQ Management > Search', and two tabs: 'Members' (selected) and 'Clubs'. Below the tabs is a large empty search input field and a 'Search' button. A blue circle highlights the 'Available search terms' section, which lists various search criteria with their respective syntax: FullName: <last, first>; LastName: <last name>; FirstName: <first name>; Club: <club name>; District: <district name>; OUType: <club, district, region>; Officer: <All, Area President Elect, ASD - Brotherhood Fund, Area President, etc>; Year: <all, current, upcoming, 2016, 2015, 2014, etc>; Committee: <active committees>; MemberStatus: <current, former, current and former>; BillingCode: <code or name or None>; EffectiveStart: <m/d/yyyy>; EffectiveEnd: <m/d/yyyy>; DeletionReason: <deceased, business pressure, other, attendance, etc>

- In the first field, key in "FullName" (or another search tem related to names – see available search terms).

This screenshot shows the same 'Organization search' page as above, but with the search input field containing the text 'FullName'. A dropdown menu is open below the input field, showing 'FullName' as the selected option. The 'Search' button is visible below the dropdown.

8. Type the last name of the member and select from the list.



Organization search
Current view: [HQ Management](#) > Search

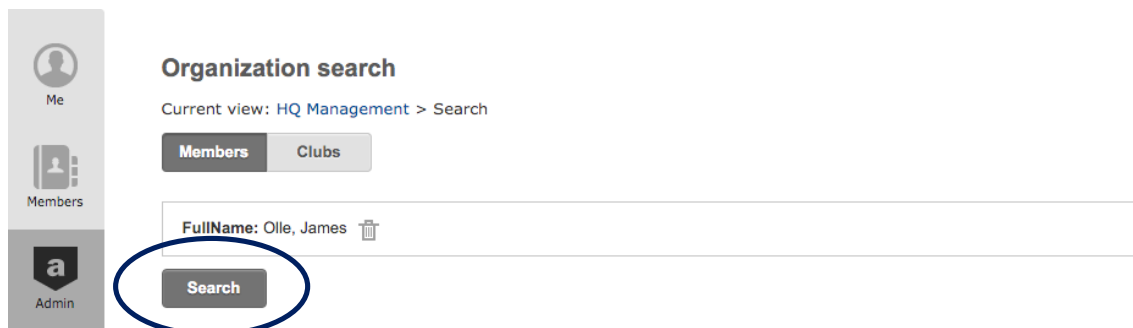
Members Clubs

FullName : olle

Olle, James

Search

9. Click "Search".



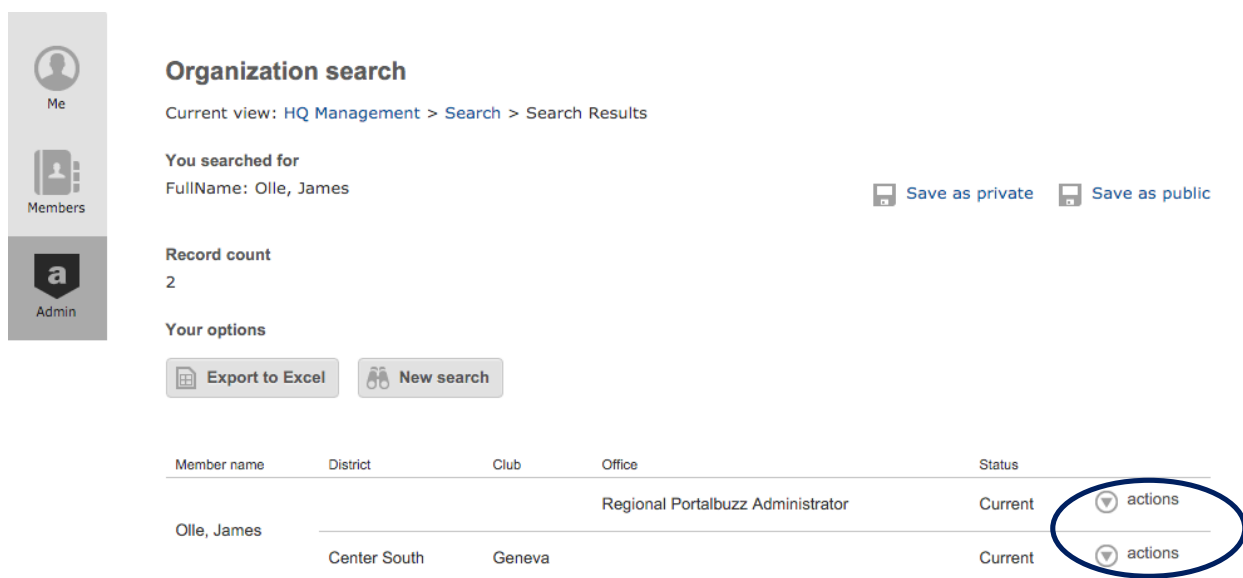
Organization search
Current view: [HQ Management](#) > Search

Members Clubs

FullName: Olle, James

Search

10. Click on "actions". If the person is a Regional or District administrator, you will see several positions listed. It does not matter which "actions" button you use.



Organization search
Current view: [HQ Management](#) > [Search](#) > Search Results

You searched for
FullName: Olle, James [Save as private](#) [Save as public](#)

Record count
2

Your options
[Export to Excel](#) [New search](#)

Member name	District	Club	Office	Status	actions
Olle, James			Regional Portalbuzz Administrator	Current	actions
Olle, James	Center South	Geneva		Current	actions

11. From the actions list, choose “add to new club”.

Organization search
Current view: [HQ Management](#) > [Search](#) > Search Results

You searched for
FullName: Olle, James

Record count
1

Your options
[Export to Excel](#) [New search](#)

Member name	Office	Status	actions
Olle, James	Regional Portalbuzz Administrator	Current	<ul style="list-style-type: none">vieweditrelationshipschanges logadd to new clubdelete

12. Under “Organization unit”, enter the first few letters of the club to which the member should be added, select it from the list that appears, then click “Add”.

Australia Management
Current view: HQ Management

Search (meml)
Add n (for pe)
Chang (track)

Add new member

Join date
3-February-2016

Organization unit

[Add](#) [Cancel](#)

13. If you are adding a member as a member-at-large, start typing “Member at Large”. Two clubs will appear – choose the one that has the Region name attached to it. Then click “add”.

Olle, James

Join date
10-March-2016

Organization unit
Mem|
Members at Large
Members at Large - Central Southern Europe

14. Click “Close”.

15. From the drop-down list, click “delete” to remove the member from the old club, if necessary. Only delete the member from the old club after the member has been added the member to the new club.

Organization search
Current view: HQ Management > Search > Search Results

You searched for
FullName: Olle, James

Record count
2

Your options
Export to Excel New search

Member name	District	Club	Office	Status	
			Regional Portalbuzz Administrator	Current	actions
Olle, James	Center South	Geneva		Current	actions

- view
- edit
- relationships
- changes log
- add to new club
- delete

16. If the member is a District or Regional Officer or Administrator, you will see a combination of club, District and Region names. Only delete the club.

Modify the deletion date if necessary and enter the reason for deletion. Then click “Delete”.

The screenshot shows the 'Delete member' dialog box overlaid on the 'Organization search' page. The dialog box has a title bar with a close button. Below the title, it says 'Remove James Olle from these clubs' with two radio button options: 'Central Southern Europe' (unchecked) and 'Geneva' (checked). Below that is a 'Deletion date' field with a calendar icon, containing the text '10-March-2016'. Underneath is a 'Reason' section with a list of options: 'Attendance' (checked), 'Business pressure', 'Deceased', 'Health', 'Lack of interest', 'Lack of time', 'Moved' (highlighted in blue), 'Non-payment of dues', and 'Other'. The background shows the search results for 'James Olle' with a record count of 2.

NOTE: If you are adding a member that is in the system but does not currently belong to a club, first enter the search term “MemberStatus” and then “Former”.

The screenshot shows the 'Organization search' page. The 'Members' tab is selected. A search box contains the text 'MemberStatus : for'. A dropdown menu is open below the search box, showing the options 'former' and 'current and former'. Below the search box is a 'Search' button. At the bottom of the page, there is a section titled 'Available search terms' with a list of search criteria and their possible values: FullName: <last, first>, LastName: <last name>, FirstName: <first name>, Club: <club name>, District: <district name>, OUType: <region, club, district>, Officer: <All, Archives, Area President, ASD - Bulletin Editor, etc>, Year: <all, current, upcoming, 2016, 2015, 2014, etc>, Committee: <active committees>, MemberStatus: <current, former, current and former>, BillingCode: <code or name or None>, EffectiveStart: <m/d/yyyy>, EffectiveEnd: <m/d/yyyy>, DeletionReason: <moved, lack of interest, non-payment of dues, deceased, etc>.