



# Portalbuzz

## Generating a membership report

1. 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 Select

### General administration

**Headquarters management screen** (Headquarters Administrator)  
Manage users, clubs, officers etc. Select

**Officers** (Administrator, Secretary, Users Administrator)  
Add, edit, delete club officers for the current and upcoming year. Select

2. Select "Search".

**Australia Management**

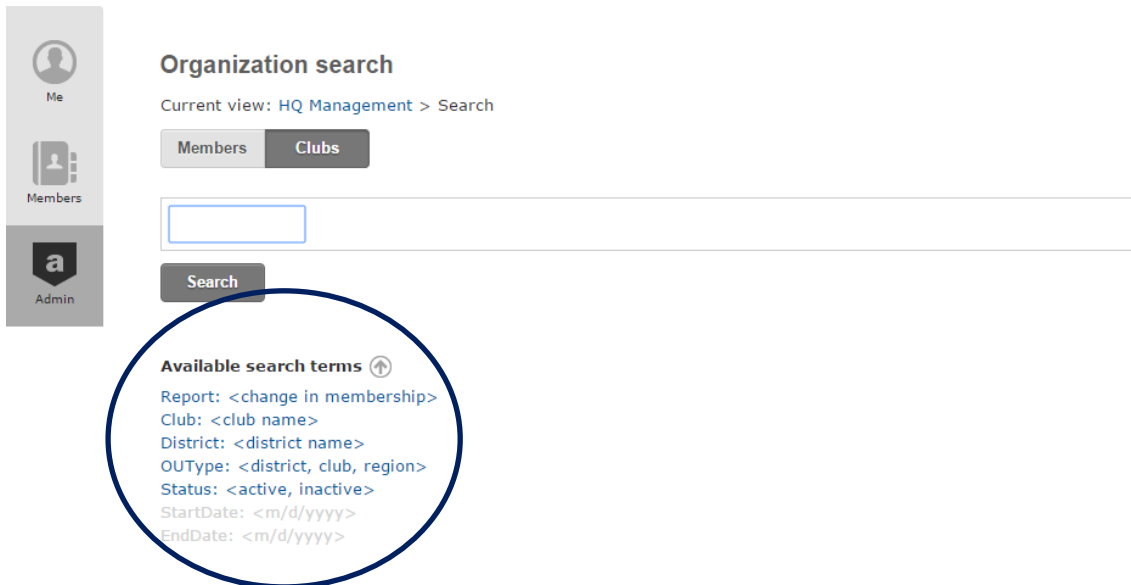
Current view: HQ Management

**Search**  
(members, clubs, manage officers of clubs) Select

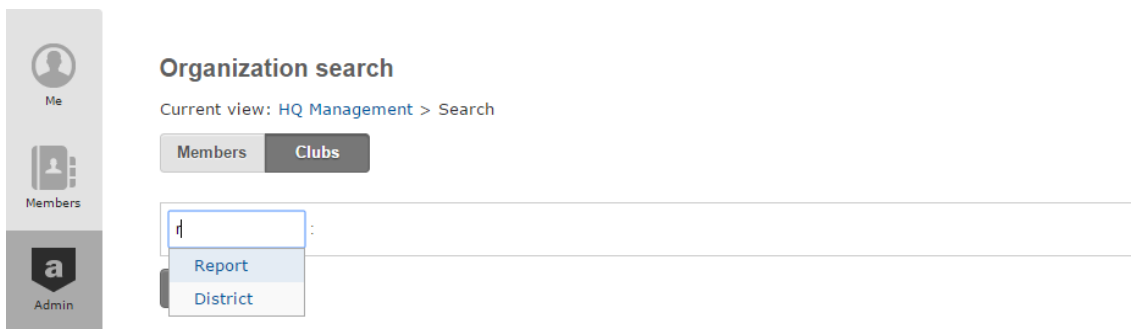
**Add new member**  
(for people not in database) Select

**Change log**  
(tracks the changes for membership, officers, and invoices) Select

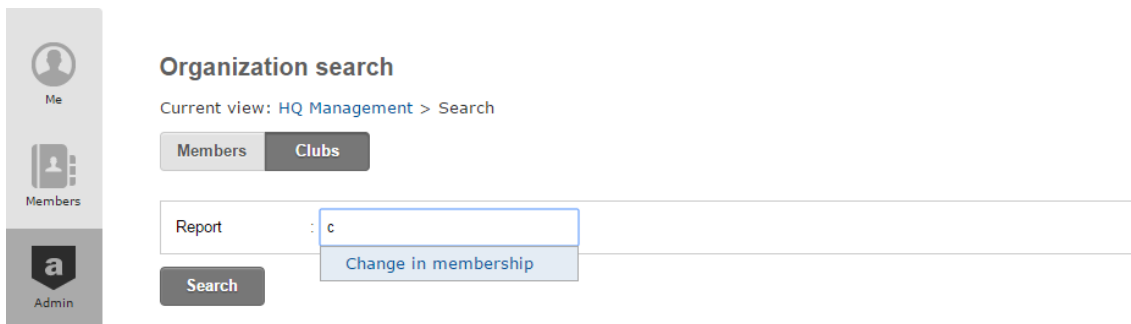
- Drop down the list to see the available search terms (this is not necessary to do the search but will help you familiarise yourself with the available functions).



- In the first field, key in "Report".



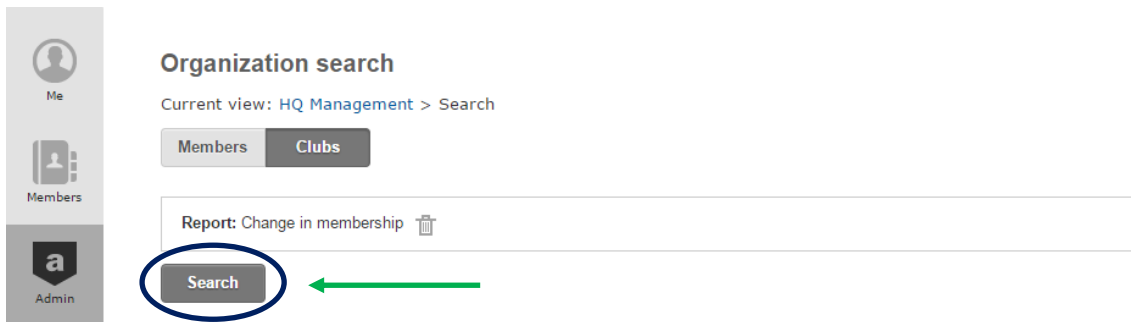
- In the second field, key in "change in membership".



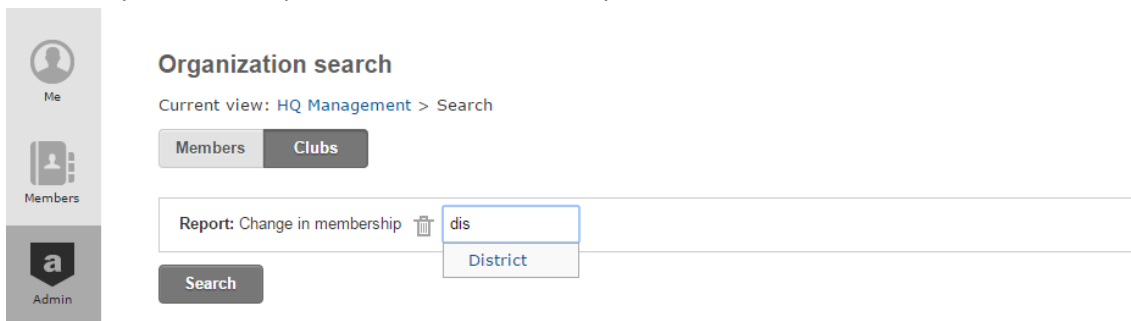
Optionally, you can also enter Start and End dates for your search (see available search terms).

This allows you to see the difference in membership over a given period, comparing the membership at the "StartDate" with the "EndDate".

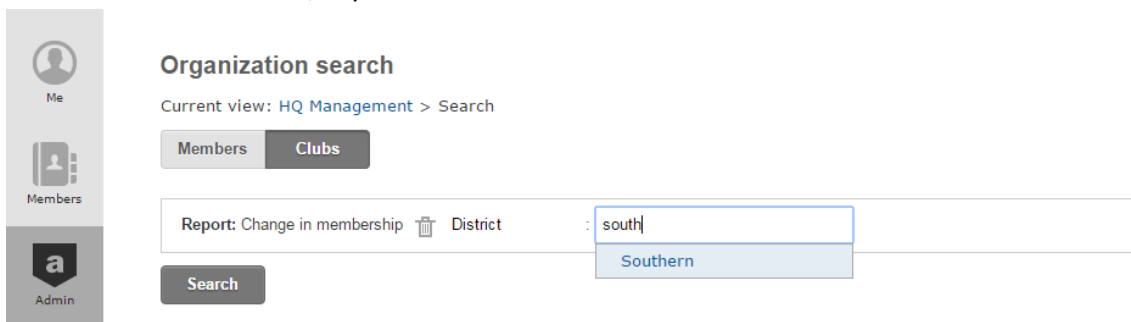
6. If you now click “search” the result will be for the highest level that you are logged in as (i.e. if you are logged in as a Regional Administrator or Regional Director, you will receive a report for the Region). **Skip to Step 9**



7. If you want a report for District or Club, key in “District” or “Club” into the third field.



8. In the fourth field, key the District or Club.



Optionally, you can enter Start and End dates for your search (see available search terms).

This allows you to see the difference in membership over a given period, comparing the membership at the “StartDate” with the “EndDate”.

- Export the data to excel. Use the arrow on the Export button to choose between a basic report (club name and membership figures) or detailed report (also includes all data on club). Simply clicking the Export button will give a basic report.

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

You searched for  
 Report: Change in membership Save as private Save as public

Record count  
 15

Your options  
 Export to Excel (circled) New search

Basic (highlighted with green arrow)  
 Detailed

club name	district	starting #	ending #	difference
Adelaide	North Central	0	18	+18
Ararat	Central	0	10	+10

- Use the sum function in Excel to calculate the total.

	A	B	C	D	E	F	G
1	Club name	Area	Region	District	Starting #	Ending #	Difference
2	Adelaide	South Pacific	Australia	North Central	0	18	+18
3	Ararat	South Pacific	Australia	Central	0	10	+10
4	Ballarat	South Pacific	Australia	Central	0	18	+18
5	Bendigo South	South Pacific	Australia	Southern	0	19	+19
6	Bendigo, Inc.	South Pacific	Australia	Southern	0	32	+32
7	Broken Hill	South Pacific	Australia	North Central	0	13	+13
8	Central Coast	South Pacific	Australia	Southern	0	15	+15
9	Eaglehawk	South Pacific	Australia	Southern	0	24	+24
10	Echuca	South Pacific	Australia	Southern	0	11	+11
11	Geelong	South Pacific	Australia	Central	0	19	+19
12	Honiara	South Pacific	Australia	Southern	0	0	
13	Kangaroo Flat	South Pacific	Australia	Southern	0	20	+20
14	Members at Large	South Pacific	Australia	Members at Large	0	0	
15	Port Pirie	South Pacific	Australia	North Central	0	10	+10
16	Suva	South Pacific	Australia	Southern	0	20	+20
17							
18						=sum(F2:F16)	