

Manual Member Maintenance

Summary

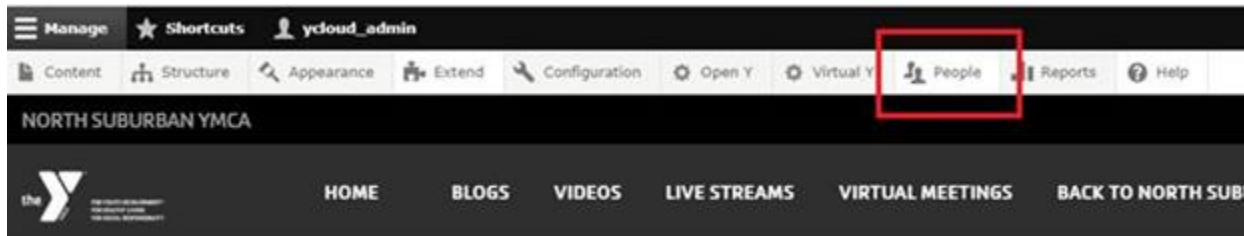
There will be times when members should be created, modified, or removed from the Virtual Y system without having to wait for the next execution of the member CSV upload file. This document outlines the steps necessary to add, update, or remove Virtual Y members.

When Virtual Y members are added manually within the Virtual Y site instead of through the CSV upload process, they will no longer be updated through bulk CSV actions such as Rollback or Updates. Updates and Member removal for these members will have to be accomplished manually within the site.

NOTE: Administrators and Staff users should always be added to the Virtual Y site prior to importing Virtual Y members using the CSV upload process, using the Administration > People page. Additionally, Administrators and Staff users should not be added to the CSV member file and should not be assigned the roles "Virtual YMCA", "Virtual YMCA Trial", or "Virtual YMCA Premium", as these are reserved for Members.

Steps to manually add a Member

- 1) Navigate to your Virtual Y website and log into the admin section
- 2) Navigate to the People Section by
 - a. Clicking the **"Manage"** link in the top left of the site then clicking on **People**.




b. Click the blue "+ Add user" button.

The screenshot shows a web interface for user management. At the top, there are three tabs: "List", "Permissions", and "Roles". Below the tabs is a breadcrumb trail: "Home » Administration » People". A yellow warning banner states: "Website contains unresolved configuration conflicts. Please visit Upgrade Tool Dashboard". A blue button labeled "+ Add user" is highlighted with a red rectangular box. Below the button is a search and filter section with the following elements:

- Name or email contains:** A text input field.
- Status:** A dropdown menu with the selected option "- Any -".
- Role:** A dropdown menu with the selected option "- Any -".
- Permissions:** A dropdown menu with the selected option "- Any".
- Filter:** A button to apply the search filters.
- Action:** A dropdown menu with the selected option "Update URL alias".
- Apply to selected items:** A button to apply actions to the selected items.

- 3) On the Add User page, the following fields must be completed:
- a. **Email Address**
 - b. **Username** – This can be the very same text as the Email address for manually-created Members.
 - c. **Password** – This is not needed for Members to enter the site but is required entry on this form.
 - d. **Status** – This can be set to *Blocked* for new users, which is the setting for Members added through the bulk load process.
 - e. **Roles** – Please select “*Virtual YMCA*”, “*Virtual YMCA Premium*”, or “*Virtual YMCA Trial*” for the Member’s role. The other roles listed are reserved for administrative staff Virtual Y users.

Home » Administration » People » Add user

 Website contains unresolved configuration conflicts. Please visit [Upgrade Tool Dashboard](#) page and follow the instructions.

This web page allows administrators to register new users. Users' email addresses and usernames must be unique.

Email address

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if certain news or notifications by email.

Username *

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_), and the @ sign.

Password *

Password strength:

Confirm password *

Passwords match:

Provide a password for the new account in both fields.

Status

Blocked

Active

Roles

Authenticated user

Administrator

Virtual YMCA

Virtual YMCA Editor

Virtual YMCA Premium

Virtual YMCA Trial

Contributor

Editor

- 4) Complete the process by clicking the “Create new account” button towards the bottom of the page.

▼ CONTACT SETTINGS

Personal contact form
Allow other users to contact you via a personal contact form which keeps your email address private even if you choose to disable this feature.

▼ LOCALE SETTINGS

Time zone
Chicago
Select the desired local time and time zone. Dates and times throughout this site will be displayed in this time zone.

URL alias
Specify an alternative path by which this data can be accessed. For example, type "/about" when you want to access the about page.

Create new account

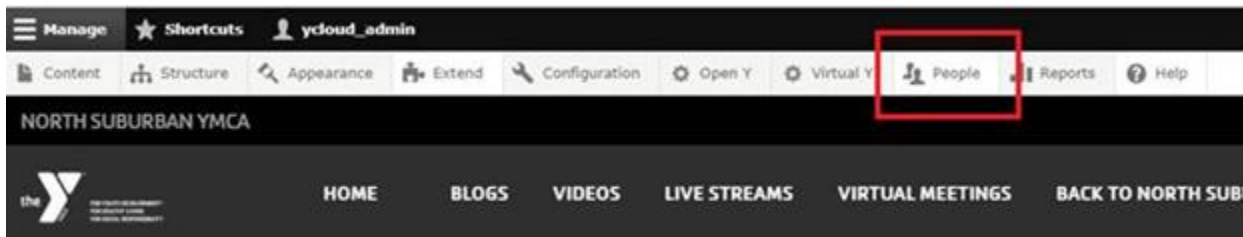
Y CLOUD SUPPORT

If you are experiencing issues with your Virtual Y site that require escalation to the Y Cloud support team, please contact us with resolution.

- During Onboarding: Email ycloud@ymca.net
- After going live: Submit a support ticket

Steps to manually edit a Member

- 1) Navigate to your Virtual Y website and log into the admin section
- 2) Navigate to the People Section by
 - a. Clicking the “Manage” link in the top left of the site then clicking on **People**.



- 3) On the People page, select the member to edit by clicking on the Edit button at the far right of that member’s row.


Action
Update URL alias

Apply to selected items

<input type="checkbox"/>	USERNAME	STATUS	ROLES	MEMBER FOR	LAST ACCESS	OPERATIONS
<input type="checkbox"/>	Jane 22	Blocked	• Virtual YMCA	1 week 2 days	never	Edit
<input type="checkbox"/>	Tom 21	Active	• Virtual YMCA	1 week 2 days	25 minutes 22 seconds ago	Edit

- 4) On the Edit form, any of the following fields can be updated:
- a. **Email address** – This field is still required.
 - b. **Username** – This field is still required.
 - c. **Password** – On the Edit form, password is **no longer** required entry as it was during the manual add process.
 - d. **Status**
 - e. **Roles** - Please select “*Virtual YMCA*”, “*Virtual YMCA Premium*”, or “*Virtual YMCA Trial*” for the Member’s role. The other roles listed are reserved for administrative staff Virtual Y users.

[Home](#) » [Tom 21](#) » [Tom 21](#)

 Website contains unresolved configuration conflicts. Please visit [Upgrade Tool Dashboard](#) page and follow the instructions.

Email address *

tom.scarborough@ymca.net

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used for certain news or notifications by email.

Username *

Tom 212

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_), and the @ sign.

Password

Password strength:

Confirm password

Passwords match:

To change the current user password, enter the new password in both fields.

Status

Blocked

Active

Roles

Authenticated user

Administrator

Virtual YMCA

Virtual YMCA Editor

Virtual YMCA Premium

Virtual YMCA Trial

- 5) Complete the process by clicking the blue “Save” button towards the bottom.

▼ **LOCALE SETTINGS**

Time zone

Chicago ▼

Select the desired local time and time zone. Dates

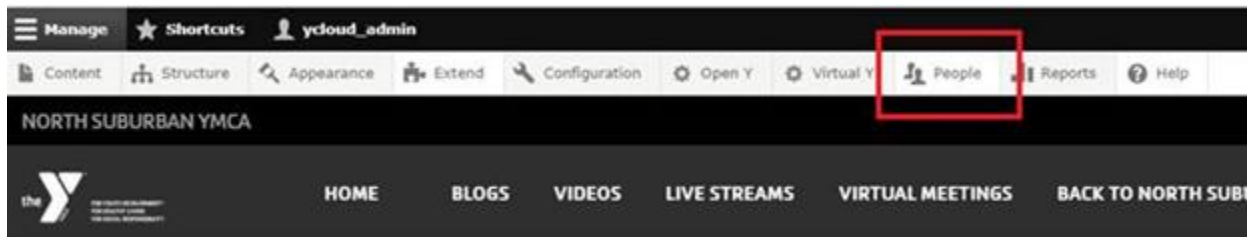
URL alias

Specify an alternative path by which this data can be i

[Cancel account](#)

Steps to manually cancel a Member

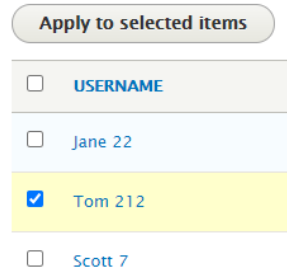
- 1) Navigate to your Virtual Y website and log into the admin section
- 2) Navigate to the People Section by clicking the “**Manage**” link in the top left of the site then clicking on **People**.



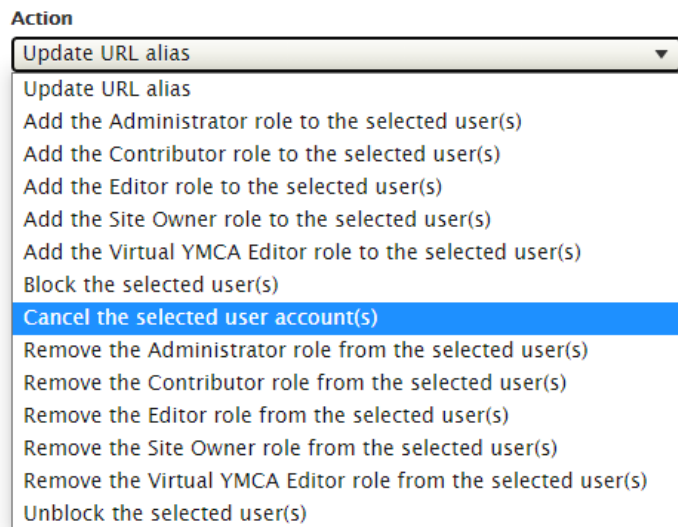
On the People page, Members can be cancelled in two ways.

From the People page...

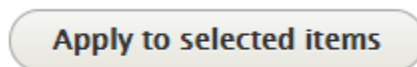
- a. Select the member to be removed by selecting the checkbox to the left of that Member's username.



- b. In the Action dropdown menu, select "Cancel the selected user account(s)"



- c. Click the "Apply to selected items" button.



- d. The Cancel user screen is displayed. Please select from the available options appropriate for maintaining or removing any content created by the Member and click “Cancel Accounts” to complete.

- Tom 212

When cancelling these accounts

- Disable the account and keep its content.
- Disable the account and unpublish its content.
- Delete the account and make its content belong to the *Anonymous* user.
- Delete the account and its content.

Require email confirmation to cancel account

When enabled, the user must confirm the account cancellation via email.

This action cannot be undone.

Cancel accounts

Cancel

From within the Edit screen for a user...

- a. Scroll to the bottom, where next to the “Save” button is a link button labeled “Cancel account”.

URL alias

Specify an alternative path by which this data ca

Save

[Cancel account](#)

- b. Clicking “Cancel account” brings up the same page listing specific cancellation options.

- Tom 212

When cancelling these accounts

- Disable the account and keep its content.
- Disable the account and unpublish its content.
- Delete the account and make its content belong to the *Anonymous* user.
- Delete the account and its content.

Require email confirmation to cancel account

When enabled, the user must confirm the account cancellation via email.

This action cannot be undone.

Cancel accounts

Cancel

- c. Clicking the **“Cancel accounts”** button removes the Member, whereas the **Cancel** button on the right leave the Member account active.