

Editing a Member & Adding Roles.

As a CB or Club it is important that you keep you member data up to date. The information stored on RugbyFirst is both important to the CB/Club and the RFU.

In order to update members details you need to have the correct access rights. The functionality available to you will be dependant on the role assigned to you in the system. To find out which role can access what data and functionality, please see the User Rights spreadsheet in the User Guide section of the RugbyFirst Homepage.

To update/amend member details select Membership and Member List

E-Learning	
RugbyFirst Help And Support	
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Membership	Member List
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The member list contains all the individuals within your chosen CB/Club that have a role or membership.

Membership List

[Click here to search for members](#)

List All - [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Type	Name	Renewal	Status	Phone/Email		CRB			
tempU14	Christopher Ashmore ▶ Officer / Registrar / Adult ▶ Officer / Training ▶ Player / Not Registered / Adult (Men) ▶ Director of Rugby ▶ Team Officers / Doctor ▶ Webmaster / Full Webmaster	20/04/2010	Full	rugbyfirstsupport@therfu.com (0) 7843 678186					<input type="checkbox"/>
tempU14	Susan Bates	14/09/2009	Full	suebates@rfu.com (0) 20 87442057					<input type="checkbox"/>
Enquiry	Max Burton ▶ Club Contact / Club Captain ▶ Officer / Marketing ▶ Officer / President	17/07/2009	Full	MaxBurton@rfu.com (0) 20 1234567					<input type="checkbox"/>
tempU14	Max Burton	07/09/2010	Full						<input type="checkbox"/>
Family	CAS Test User 1 CAS Test User 1 ▶ Webmaster / Full Webmaster	07/08/2010	Full						<input type="checkbox"/>
Enquiry	Paul Chorley ▶ Club Contact / League Contact ▶ Club Contact / International Ticket Contact ▶ Club Liason / Volunteer ▶ Coach ▶ Officer / Hon Treasurer ▶ Officer / Past President ▶ Officer / Registrar / Youth ▶ Officer / Registrar / Adult ▶ Officer / Registrar / WOMENS ▶ Player / Not Registered / Adult (Men) ▶ Player / Registered / Adult (Men) ▶ Referee Re-Appointments / Sunday and Midweek	21/05/2008	Full	paulchorley@rfu.com (0) 208 8316647					<input type="checkbox"/>
MemberNew	Paul Test Chorley ▶ Coach / Senior / 1st XV ▶ Officer / Training	09/07/2008	Full	paulchorley@rfu.com					<input type="checkbox"/>

To edit specific member's details, select the green pencil to the right of the member.



Please be aware. This function will only be available to specific individuals with the correct user rights within the chosen CB/Club.

Select the green pencil and a new page will be displayed

Edit Member - Max Test2

The screenshot shows a web interface for editing a member's details. At the top, there are five tabs: 'Personal Details', 'Contact Details', 'Membership', 'Security', and 'Payment', with 'Personal Details' selected. Below the tabs, the form is split into two columns. The left column, titled 'Personal', contains several input fields: 'Title' (dropdown), 'First Name' (text, 'Max'), 'Middle Name' (text), 'Last Name' (text, 'Test2'), 'Label' (text), 'Gender' (dropdown, 'Male'), 'Date Of Birth' (text, '9/1/1979'), a checked 'Over 18?' checkbox, 'Disability' (dropdown, 'No'), 'Ethnic Origin' (dropdown, 'White: British'), and a 'Personal Notes' text area. The right column, titled 'Profile', has 'Company' and 'Occupation' text fields. Below these is a 'Photo' section with a large grey placeholder, a smaller square icon, and the 'RFU Individual ID' (996411). A 'Change Photo' button is located below the photo area. At the bottom of the form are four buttons: 'New', 'Save', 'Cancel', and 'Next >>'.

Via these pages you can view, update and change a host of information about the individual. The tabs at the top of the page illustrate the information you can view and amend.

Ensure once you have updated specific details about an individual, you **Save** these changes prior to moving onto a new page. Changes will not be saved automatically and lost if you select a new tab or exit with saving.

Updating Roles

To update a role for an individual, select **Membership** from the tab menu.

Edit Member - Max Test 11

Personal Details Contact Details **Membership** Security Payment Awards




Membership

Membership Type: tempU14 Membership No:
Enquiry Date: 29/09/2009 Renewal Date: 29/09/2010
Join Date: 29/09/2009 Status: Full
Default Club:

Membership Statement (This will appear next to your name in the membership list. 255 character max.)

Role Positions

Role Name: Category: Sub-Category: Notes:

Role	Category	Sub Category	
Player	Registered	Adult (Men)	
Player	Not Registered		
Webmaster	Full Webmaster		

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<< Prev New Save Cancel Next >>

Select **Role Name** from the Role Position section of the page and select the **Role**. For the purposes of this exercise we are adding the role of **Hon Secretary**.

Select **Officer**, the category drop down will now become active.

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Referee
 Officer
 Player

Membership

Security

Payment

Awards

Referee
 Referee Appointments
 Referee Re-Appointments
 Regional Rugby Development
 Rugby Development Officer
 RWC Recruitment Team
 School
 Section Officers
 Team Officers
 Training Officer
 vRugby
 Webmaster

Membership No
 Renewal Date
 Status

Category

Sub-Category

Role	Category	Sub Category	
Player	Registered	Adult (Men)	
Player	Not Registered		
Webmaster	Full Webmaster		

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Select the **Category** drop down menu and **Hon Secretary**. Here you can define the type of role the member will hold at the club.

To get a comprehensive list of which Categories fall under what Roles e.g. Role – Officer, Category – Hon Secretary, please see the Membership Types PDF in the User Guide page of the RugbyFirst homepage.

The screenshot shows a web form with several sections:

- Membership:** Membership Type: tempU14; Enquiry Date: 29/09/2009; Join Date: 29/09/2009; Default Club: [empty]; Membership Statement: [empty]
- Role Positions:** Role Name: Officer
- Category List (dropdown):** Athletic Union, Chairman, Competition Manager, CRB Compliance Officer, Deputy/Vice Chairman, Deputy/Vice President, Director, Discipline Secretary, Fixtures Secretary, Grading, Health and Safety Officer, Hon Asst Secretary, **Hon Secretary** (selected), Hon Team Secretary, Hon Treasurer, League Secretary, Manager, Marketing, Membership Secretary, Past President, President, Press, PRL, Registrar, Social Secretary, Training, Safeguarding
- Sub-Category Table:**

Role	Category	Sub-Category	Active
Player	Registered	Adult (Men)	
Player	Not Registered		
Webmaster	Full Webmaster		

On occasions, once the Category has been selected, the **Sub Category** will become active. This will only need to be populated as and when the option becomes active.

Once you have made your selection, Select **Add**.

Edit Member - Max Test 11

Personal Details | Contact Details | **Membership** | Security | Payment | Awards

Membership

Membership Type: tempU14 | Membership No: | Enquiry Date: 29/09/2009 | Renewal Date: 29/09/2010 | Join Date: 29/09/2009 | Status: Full | Default Club: |

Membership Statement (This will appear next to your name in the membership list. 255 character max.)

Role Positions

Role Name: Officer | Category: Hon Secretary | Sub-Category: | **Add**

Role	Category	Sub Category	
Player	Registered	Adult (Men)	
Player	Not Registered		
Webmaster	Full Webmaster		

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<< Prev | New | Save | Cancel | Next >>

The role will now be added to the member's roles and can be viewed in both the membership list and the Role positions from the edit member screens.

Edit Member - Max Test 11

Personal Details | Contact Details | **Membership** | Security | Payment | Awards

Membership

Membership Type: tempU14 | Membership No: | Enquiry Date: 29/09/2009 | Renewal Date: 29/09/2010 | Join Date: 29/09/2009 | Status: Full | Default Club: |

Membership Statement (This will appear next to your name in the membership list. 255 character max.)

Role Positions

Role Name: Officer | Category: Hon Secretary | Sub-Category: | **Add**

Role	Category	Sub Category	
Officer	Training		
Officer	Hon Secretary		

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<< Prev | New | Save | Cancel | Next >>