

Exporting - CB

The export facility allows you to search for specific data about CB/Club Members and export this information into an Excel file, which can be saved to a computers desktop or folder.

To export select the **Membership** menu and **Membership List**.

Membership	Member List
Club Profile	Roles
Teams	Types
Events	Export Member Data
	Email Members
	Email History
	Merge Individuals
	Pending Members
	Club Handbook
	Reports

This will display a list of all your current members at the CB.

You can choose to export member details in a number of ways.

If you wish to export data from members in your current member list, select the **tick box** on the right of the screen, Scroll to the bottom of the Membership List, once all the individuals you wish to export are selected, select **Export Selected Users** and a screen will appear, outlining which data you want to export about the individuals. The next process will be shown later in the guide.

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 ▶ Officer / Registrar / Youth ▶ Officer / Registrar / Youth ▶ 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"/>	

Alternatively you can carry out a bulk search at CB level where you can export details of specific individuals at those clubs that fall within the given CB.

To do this, please go to the Membership List (as outlined above) and from the top of the screen, select **Click here to search for members**

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 ▶ Officer / Registrar / Adult ▶ Officer / Registrar / Youth ▶ 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"/>

This will open a large search box, where as a CB you can choose to search for individuals via their membership types, the specific roles, awards and club. These options are all available via the tabs at the top of the search.

Membership List

[Click here to hide the member search panel.](#)

Membership Search

Search Text:
 Member Status:
 Full
 Lapsed
 Enquiry

Membership Type: *Any Membership Type
 Gender: *Any Gender
 Payment Method: *Any Payment Method

Award:
 Membership Number:

From: To:

DOB:
 Birthday:
 Join Date:
 Enquiry Date:
 Renewal Date:

[Clear All Search Details](#)
[Clear Membership Search Details](#)

For the purposes of this guide, the search will be for all **Hon Secretaries** at the Clubs within the CB.

To do this the **Role Tab** must be selected. From here select the Role Drop down menu and start to build your search.

Honorary Secretaries can be found by selecting the Officer Role. (If you are unsure which roles, create which categories a list can be found in the Membership Types PDF in the User guide section of RugbyFirst)

Select **Officer**

Membership List
[Click here to hide the member search panel.](#)

Members Roles Awards Constituents

Role Search

Role	Category	Sub-Category	<input checked="" type="checkbox"/> Cascade All
Find people with role ...	*Any Role		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Advisor Development Officer		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	CB Super User		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Club Contact		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Club Liason		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Club Referee Developer		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Coach		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Committee		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Competition Roles		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	CRB Check		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Director of Rugby		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Higher Education		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Officer		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Player		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Referee		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Referee Appointments		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Referee Re-Appointments		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Regional Rugby Development		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Rugby Development Officer		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	RWC Recruitment Team		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	School		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Section Officers		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Team Officers		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Training Officer		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	vRugby		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Webmaster		<input checked="" type="checkbox"/> Cascade

Search Hide Sea

List All - A B C D E : S T U V W X Y Z

[Clear All Search Details](#) [Clear Roles Search Details](#)

Once selected the category drop down menu will become active, select **Hon Secretary**.

Membership List
[Click here to hide the member search panel.](#)

Members * Roles Awards Constituents

Role Search

Role	Category	Sub-Category	<input checked="" type="checkbox"/> Cascade
Find people with role ...	Officer	Any Role Category	All <input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Any Role Category	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Athletic Union	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Chairman	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Competition Manager	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	CRB Compliance Officer	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Deputy/Vice Chairman	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Deputy/Vice President	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Director	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Discipline Secretary	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Fixtures Secretary	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Grading	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Health and Safety Officer	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Hon Asst Secretary	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Hon Secretary	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Hon Team Secretary	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Hon Treasurer	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	League Secretary	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Manager	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Marketing	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Membership Secretary	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Past President	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	President	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Press	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	PRL	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Registrar	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Social Secretary	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Training	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Safeguarding	<input checked="" type="checkbox"/> Cascade

Search Hide Search Panel After Search

[List All - A B C D E F G H I J K L M N O P Q R S](#)

[Clear Roles Search Details](#)

The Sub Category will now become active. On occasions this will be necessary to further break down the search. For example searching for Coaches – Junior – Under 13's.

In the case of searching for Hon Secretaries, select **Any Sub Category**.

Membership List
[Click here to hide the member search panel.](#)

Members * Roles Awards Constituents

Role Search

	Role	Category	Sub-Category	<input checked="" type="checkbox"/> Cascade All
Find people with role ...	Officer	Hon Secretary	Any Role Sub-Category	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade

[Clear All Search Details](#) [Clear Roles Search Details](#)

Hide Search Panel After Search

The first part of the search is complete. Now the search needs to look at all clubs within the given CB.

Select the **Constituents tab**.

The Constituents tab lists all clubs that fall under the CB. You can search specific clubs for members, roles and awards. Alternatively and for the purposes of this search **Select All** this will highlight that the search will be looking for all Hon Secretaries at all clubs within that CB.

Once all clubs have been selected, select **Search**.

Membership List
[Click here to hide the member search panel.](#)

Members * Roles Awards **Constituents**

Constituent Search

Search in parent organisation

Search in the following constituent organisations Search by Club Name

<input checked="" type="checkbox"/> Select All	Organisation Name
<input checked="" type="checkbox"/>	Barton-Under-Needwood RFC
<input checked="" type="checkbox"/>	Bloxwich RFC
<input checked="" type="checkbox"/>	Brinsford RFC
<input checked="" type="checkbox"/>	Burntwood RUFC
<input checked="" type="checkbox"/>	Burton RFC Ltd
<input checked="" type="checkbox"/>	Cannock RUFC
<input checked="" type="checkbox"/>	Eccleshall RUFC
<input checked="" type="checkbox"/>	Essington RUFC
<input checked="" type="checkbox"/>	Featherstone RFC
<input checked="" type="checkbox"/>	Handsworth RUFC
<input checked="" type="checkbox"/>	Hanford RFC

[Clear All Search Details](#) [Clear Constituent Search Details](#)

Hide Search Panel After Search

The search will return all Hon Secretaries at Clubs. It will highlight the club that they have the role at, the individual name, contact details and membership status.

In order to export the data, you can either individually select the members to export or select all, in this instance select all by selecting the **tick box at the top**, which will place a tick against everyone's account.

To perform the export, go to the bottom of the search and select to **Export Selected Users**.

Membership List

[Click here to show search panel.](#) (Search Criteria in use.)

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			<input type="checkbox"/>
Whittington RFC		01/09/2007	Full	r c					<input type="checkbox"/>
St Leonards RFC		28/01/2009	Full	r (<input type="checkbox"/>
Wheaton Aston & Penkridge RUFC		07/10/2009	Full	v (<input type="checkbox"/>
Handsworth RUFC		05/08/2010	Full	a (<input type="checkbox"/>
University of Wolverhampton RFC		17/07/2010	Full	n					<input type="checkbox"/>
Essington RUFC		01/09/2008	Full	h (<input type="checkbox"/>
Bloxwich RFC		23/09/2009	Full	a c					<input type="checkbox"/>
Rugeley RUFC		01/09/2007	Full	n c					<input type="checkbox"/>
Stoke on Trent RUFC Ltd		13/08/2010	Full	c (<input type="checkbox"/>
Cannock RUFC		28/08/2010	Full	c c					<input type="checkbox"/>
Lichfield RUFC Ltd		01/09/2008	Full	r c					<input type="checkbox"/>

Page Size **20** ▼

Viewing Page **1 (Allco - Kersh)** ▼ of 2

Viewing 1 - 20 of 33

Create New Member

Email Selected Users

Export Selected Users

Create Report

A screen will open, displaying the various information that you can export about the individual.

Select the information you wish to export by ticking the relevant boxes and select **Create CSV file**. (A CSV file is an excel spreadsheet)

Export Membership Details

Select Member Data to Export

Section	Field	Include in Export? <input type="checkbox"/>
Individual	First Name	<input type="checkbox"/>
Individual	Last Name	<input type="checkbox"/>
Individual	Date of Birth	<input type="checkbox"/>
Email	Email Address	<input type="checkbox"/>
Phone	Phone Number	<input type="checkbox"/>
Phone	Phone Type	<input type="checkbox"/>
Address	Building Name	<input type="checkbox"/>
Address	House Number	<input type="checkbox"/>
Address	Address Line 1	<input type="checkbox"/>
Address	Address Line 2	<input type="checkbox"/>
Address	Address Line 3	<input type="checkbox"/>
Address	City	<input type="checkbox"/>
Address	County	<input type="checkbox"/>
Address	Postal Code	<input type="checkbox"/>
Address	Country	<input type="checkbox"/>
Individual	Organisation Name	<input type="checkbox"/>
Role	Role Name	<input type="checkbox"/>
Membership	Membership Number	<input type="checkbox"/>
Membership	Membership Type	<input type="checkbox"/>
Membership	Membership Status	<input type="checkbox"/>
Membership	Membership Renewal Date	<input type="checkbox"/>
Membership	Membership Payment Method	<input type="checkbox"/>
Membership	Membership Application Date	<input type="checkbox"/>
Bank	Bank Name	<input type="checkbox"/>
Bank	Bank Address1	<input type="checkbox"/>
Bank	Bank Address2	<input type="checkbox"/>
Bank	Bank Address3	<input type="checkbox"/>
Bank	Bank PostCode	<input type="checkbox"/>
Bank	Account Name	<input type="checkbox"/>
Bank	Account Number	<input type="checkbox"/>
Bank	SortCode	<input type="checkbox"/>

Select Export Options

Once selected the system will compile the relevant data and the following screen will appear, select to **download here**

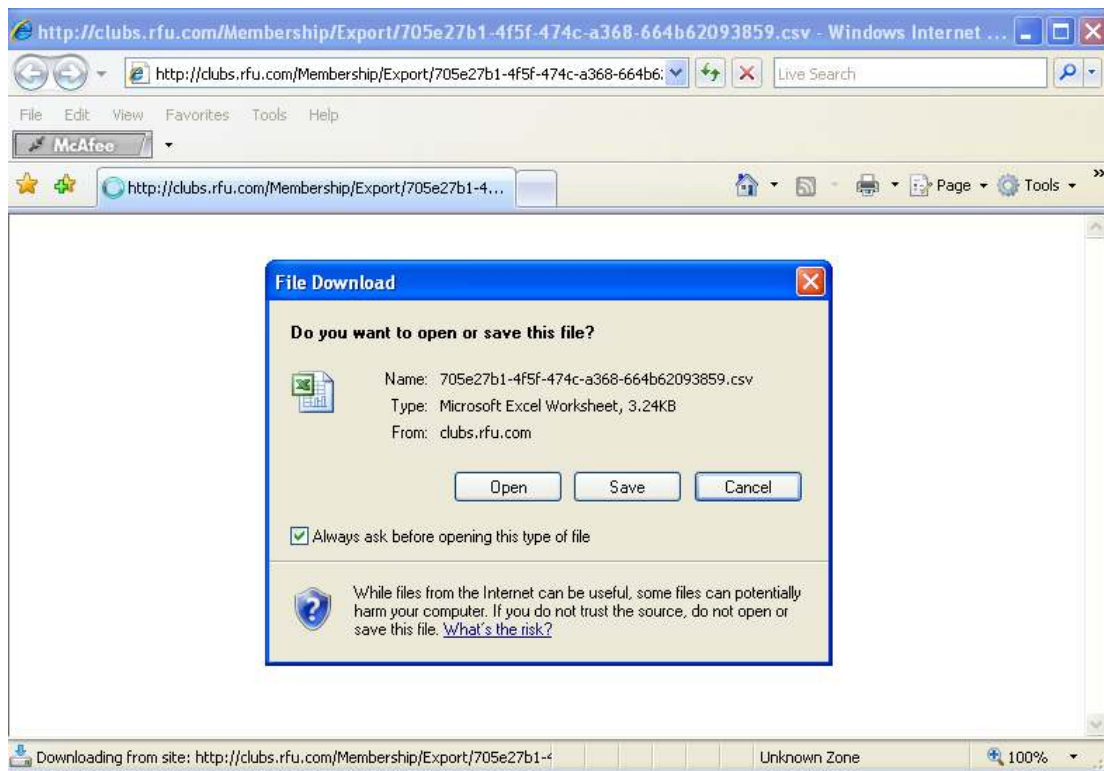
Export Membership Details

Your CSV has been created and can be downloaded [here](#)

[Click here to preview the results](#)

Excel will open from the computers desktop, asking whether you wish to, Open, Save or Cancel.

Select **Save** and choose where on the computer you wish to save the file, once the computer has saved the document, select **Open**



An excel spreadsheet will open, displaying all the data previously requested to export.

	A	B	C	D	E
1	First Name	Last Name	EmailAddress	Organisation Name	Role
2	Robert	A		Whittington RFC	Officer - Hon Secretary -
3	Richard	A		St Leonards RFC	Officer - Hon Secretary -
4	Jonathan	E		Wheaton Aston & Penkridge RUFC	Officer - Hon Secretary -
5	Auriol	E		Handsworth RUFC	Officer - Hon Secretary -
6	Maurice	E		University of Wolverhampton RFC	Officer - Hon Secretary -
7	Michael	C		Essington RUFC	Officer - Hon Secretary -
8	Anita	C		Bloxwich RFC	Officer - Hon Secretary -
9	Martin	C		Rugeley RUFC	Officer - Hon Secretary -
10	Brian	E		Stoke on Trent RUFC Ltd	Officer - Hon Secretary -
11	Diane	E		Cannock RUFC	Officer - Hon Secretary -
12	Roger	F		Lichfield RUFC Ltd	Officer - Hon Secretary -
13	Robert	F		Burntwood RUFC	Officer - Hon Secretary -
14	Fiona	F		Stone RUFC	Officer - Hon Secretary -
15	Neil	C		Wednesbury RUFC	Officer - Hon Secretary -
16	Patricia	C		Stafford RUFC	Officer - Hon Secretary -
17	Trina	F		Linley & Kidsgrove RFC	Officer - Hon Secretary -
18	Carlton	F		Hanford RFC	Officer - Hon Secretary -
19	Mick	C		Featherstone RFC	Officer - Hon Secretary -
20	Ian	F		Wolverhampton RUFC Ltd	Officer - Hon Secretary -
21	Caleb	F		Staffordshire University (Stafford) RFC	Officer - Hon Secretary -
22	Gary	L		Lichfield RUFC Ltd	Officer - Hon Secretary -
23	Gary	L		Staffordshire County Police RFC	Officer - Hon Secretary -
24	Jonathan	F		University of Keele RFC	Officer - Hon Secretary -
25	Kevin	C		Newcastle (Staffs) RUFC Ltd	Officer - Hon Secretary -
26	Jane	F		Trentham RFC	Officer - Hon Secretary -
27	Elfyn	F		Willenhall RFC Ltd	Officer - Hon Secretary -
28	David	F		Walsall RFC Ltd	Officer - Hon Secretary -
29	Victoria	E		Eccleshall RUFC	Officer - Hon Secretary -
30	Amy	E		Barton-Under-Needwood RFC	Officer - Hon Secretary -
31	Philip	E		Burton RFC Ltd	Officer - Hon Secretary -
32	John	T		Longton RFC	Officer - Hon Secretary -
33	Jeremy	T		Tamworth RUFC	Officer - Hon Secretary -
34	Michael	\		Leek RFC Ltd	Officer - Hon Secretary -
35	Glynne	\		Uttoxeter RFC	Officer - Hon Secretary -

The export process is now complete.

You can choose to export data via the Membership Tab and Export Member Data. It is entirely up to the user which function you choose to use. Using the Export Member Data function differs, as when you search for the individuals you wish to export it will not return a search. It performs the search and navigates you directly to screen asking which data you wish to export. Effectively skipping a step.

By using this method, it is possible to view the individuals and select individuals you wish to export prior to selecting which information you wish to download.

It will be a case of personal preference as to which method you choose.