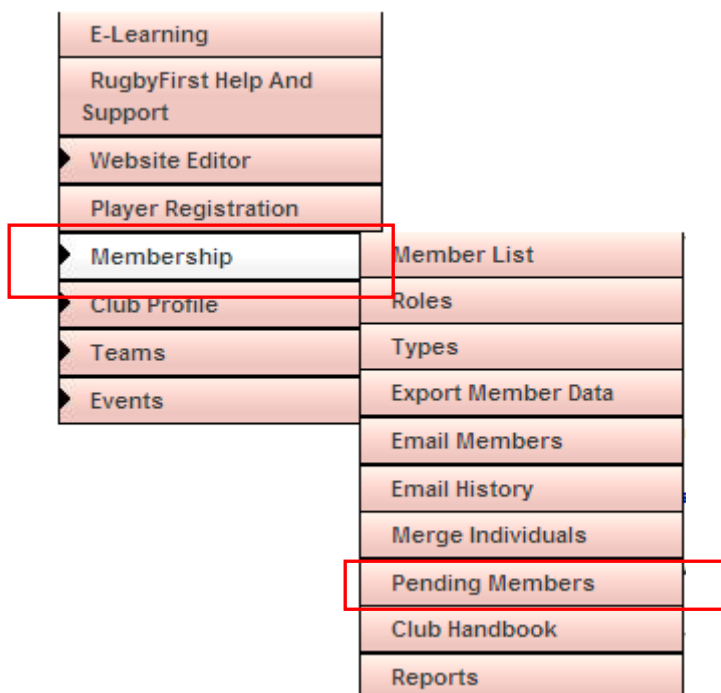


## Creating a new member on RugbyFirst

To create a new member on RugbyFirst, firstly check that the member is not in your pending membership list and been added externally.

The pending members list will display members that have been added to the system externally. These members will not be listed in your current members list until you have processed them.

To check the pending members list **Select Membership & Pending Members**



The pending member list is members that have been entered onto the system externally. The members would have come from being entered through the player registration portal, have been CRB checked, have asked to become a member via the Become a Member option on RugbyFirst or alternatively have recently been entered due to attending a coaching course.

To process members, select the individuals you wish to process. Allocate the type of membership you wish to allocate them and select Process Pending Applications. The individuals can now be seen and accessed via the membership list and will count towards the clubs statistics.

## Pending Membership List

Source	Number
Registered Youth Player	2
All	2

Name	Date Added	Source	<input type="checkbox"/>
Paul Chorley	08/09/2008	Registered Youth Player	<input type="checkbox"/>
Paul Chorley	28/08/2009	Registered Youth Player	<input type="checkbox"/>

## Select Membership Type & Status for Selected Individuals

tempU14  Full

Once you are sure that the member you are adding is not listed in pending members. Ensure you are logged into RugbyFirst and select **Membership & Membership List** from the navigation bar.

E-Learning	
RugbyFirst Help And Support	
Website Editor	
Player Registration	
Membership	Member List
Club Profile	Roles
Teams	Types
Events	Export Member Data
	Email Members
	Email History
	Merge Individuals
	Pending Members
	Club Handbook
	Reports

You will be navigated to the membership list where all your current members will be listed. From here scroll to the bottom of the page & select **Create New Member**

MemberNew	<b>Matthew Lord</b> ▶ Officer / Registrar / Youth ▶ Webmaster / Full Webmaster	23/10/2008	Full	MatthewLord@rfu.com 0208 8317602 x7602					<input type="checkbox"/>
MemberNew	<b>Robert Mackmurdie</b> ▶ Officer / Registrar / Adult	17/01/2008	Full	robmackmurdie@rfu.com (0) 7887 792163					<input type="checkbox"/>
Enquiry	<b>Burton Max</b> ▶ Officer / Training	22/07/2009	Full						<input type="checkbox"/>
tempU14	<b>Chris Test</b> ▶ Officer / Chairman	08/07/2010	Full	ctashmore@ntlworld.com					<input type="checkbox"/>

Page Size 20 Viewing Page 1 (Ashmo - Test) of 2 Viewing 1 - 20 of 25

A new screen will open.

From this screen you are prompted to search for the individual you are creating. Input the individuals name and select search. You are required to search for the individual in the first instance to check that there is not already an account and you will be creating a duplicate.



### Create Member

#### Enter New Member Information

The search will return all accounts/members listed on your club that have the same name as the one you are going to enter. It is your responsibility to check that the accounts do not match. You can do this by selecting the green pencil. This will enable you to check the individuals account and decide whether the details match those that you are going to input. If you are confident the accounts listed do not match the account you want to create, select **Add New**

### Enter New Member Information

First Name  Last Name  DOB

Name	DOB	MembershipNo	RenewalDate	
Max Test	09/01/1979		27/07/2010	
Max Test 2	09/01/1979		13/08/2009	
1				

Once you have selected add new. A new screen will open allowing you to input a variety of information about the individual you are adding to your club. Input the details about the individual, you must ensure that either a DOB or the Over 18 box is ticked before you can proceed. You will work your way through the various tabs listed at the top of the screen. Once you have completed the Personal Details tab select **Next** to move to the next screen

### Add New Member

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

#### Personal

Title

First Name

Middle Name

Last Name

Label

Gender

Date Of Birth   Over 18?

Disability

Ethnic Origin

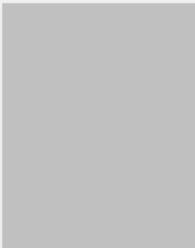
Personal Notes

#### Profile

Company

Occupation

#### Photo



A simple image based on the first and last name will be created by default if no other photo is selected.

Enter the contact details and select **Next**

## Add New Member

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

### Address

Number/Building:    
Address 1:   
Address 2:   
Address 3:   
Town:   
County:    
Postcode:   
Country:

### Telephone

Home: STD  Local Number   
Mobile:    
Work:    
Fax:    
Preferred:

### Email/Web

Home Email:   
Work Email:   
Preferred Email:  Home  Work  No EMail

The membership tab allows you to enter details regarding the individual's membership to the club and any roles they have.

## Add New Member

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

### Membership

Membership Type:   Membership No:   
Enquiry Date:  Renewal Date:   
Join Date:  Status:    
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:

Role	Category	Sub Category
		1

## Entering a membership

To enter a membership, select the membership type from the drop down menu. (The memberships listed will mirror those you have created) Enter the various dates and the status of membership

## Adding a role

To add a role, select the **Role Name** from the drop down box.

The screenshot displays the 'Role Positions' web application. A dropdown menu for 'Role Name' is open, listing various roles. The background shows a table with columns for 'Category' and 'Sub-Category', and buttons for 'New', 'Save', 'Cancel', and 'Next >>'. The 'RUGBY' logo is visible in the bottom right corner.

Role Name	Category	Sub-Category
Advisor Development Officer		Sub Category
CB Super User		
Club Contact		
Club Liason		
Club Referee Developer		
Coach		
Committee		
Competition Roles		
Director of Rugby		
Higher Education		
Officer		
Player		
Referee		
Referee Appointments		
Referee Re-Appointments		
Regional Rugby Development		
Rugby Development Officer		
RWC Recruitment Team		
School		
Section Officers		
Team Officers		
Training Officer		
vRugby		
Webmaster		

Once a **Role Name** has been selected the **Category** menu will become active. Select the **Category** for the individual.

## Add New Member

Discipline Secretary  
Fixtures Secretary  
Grading  
Health and Safety Officer  
Hon Asst Secretary  
Hon Secretary  
Hon Team Secretary  
Hon Treasurer  
League Secretary  
Manager  
Marketing  
Membership Secretary  
Past President  
President  
Press  
PRL  
Registrar  
Social Secretary  
Training  
Safeguarding

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

**Membership**  
Membership Type: Family  
Enquiry Date: 09/09/2009  
Join Date: 09/09/2009  
Default Club:   
Membership Statement (This will appear next to your name in the membership list. 255 character max.):

**Role Positions**  
Role Name: Officer  
Category: Training  
Sub-Category:

Role	Category	Sub Category
		1

Membership No:   
Date: 09/09/2010  
Status: Full  
Notes:   
Add:

Once the **Category** has been selected if necessary the Sub Category will become active.

Once you are happy with the role you are adding to the new account select **Add**

**\*PLEASE REMEMBER THE ROLE YOU ASSIGN TO AN INDIVIDUAL WILL DETERMINE THE FUNCTIONALITY AVAILABLE TO THEM ON THE SYSTEM**

## Add New Member

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

**Membership**  
Membership Type: tempU14  
Enquiry Date: 17/09/2009  
Join Date: 17/09/2009  
Default Club:   
Membership No:   
Renewal Date: 17/09/2010  
Status: Full  
Membership Statement (This will appear next to your name in the membership list. 255 character max.):

**Role Positions**  
Role Name: Officer  
Category: Training  
Sub-Category:   
Notes:   
**Add**

Role	Category	Sub Category
		1

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

The role has now been added to the individuals account. Additional roles can be added or deleted via the edit member option in the member list.

### Add New Member

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


#### Membership

Membership Type: tempU14   Membership No:   
Enquiry Date: 17/09/2009   Renewal Date: 17/09/2010  
Join Date: 17/09/2009   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:      

Role	Category	Sub Category	
Officer	Training		
1			

<< Prev   New   Save   Cancel   Next >>

Once completed, select **Next**

As you can see a username and password for RugbyFirst has already been created by the system. You can choose to change this username and password, or alternatively the new member can choose to do this at a later date.

You can also select to email the individual their username and password. (This will only be possible if you have entered an email address for them in their contact details)

If you wish to send a confirmation email, tick the **Send Confirmation Email**

## Add New Member

Personal Details	Contact Details	Membership	<b>Security</b>	Payment	Awards
------------------	-----------------	------------	-----------------	---------	--------

### Login

Login/User Name

Password

Send Confirmation Email

No username existed, a new username has been created.  
No password existed, a new password has been created.

### Data Privacy

This setting also sets the access level to your membership statement and roles.

Name

Email Address

Address

Web Address

Personal Details

Home Phone

Work Phone

Mobile Phone

Fax

<< Prev      New      Save      Cancel      Next >>

You can also select who can view certain personal details relating to the individuals.

You can choose the General Public, Club Members, Club Officers or Club Administrators.

### Add New Member

The screenshot shows a web interface with several tabs: Personal Details, Contact Details, Membership, Security (selected), Payment, and Awards. The Security tab contains a 'Login' section with fields for 'Login/User Name' (containing 'MaxZk8#a') and 'Password' (masked with dots). A checkbox for 'Send Confirmation Email' is checked. To the right of these fields, there are two lines of feedback text: 'No username existed, a new username has been created.' and 'No password existed, a new password has been created.' Below the Login section is a 'Data Privacy' section with a dropdown menu for 'Name' (set to 'Club Officers') and a list of other dropdowns for 'Email Address', 'Address', 'Web Address', 'Personal Details', 'Home Phone', 'Work Phone', 'Mobile Phone', and 'Fax', all currently set to 'Club Officers'. A red box highlights the 'Email Address' dropdown menu, which is open to show options: 'General Public', 'Club Members', 'Club Officers' (highlighted), and 'Club Administrators'. A blue note next to the 'Name' dropdown states: 'This setting also sets the access level to your membership statement and roles.' At the bottom of the form are buttons for '<< Prev', 'New', 'Save', 'Cancel', and 'Next >>'.

Once you have completed this screen, select **Save**.

The individual has now been created and can be viewed via your membership list.

Also upon selecting Save and if you have chosen to email the individual their new username and password, an email screen will appear.

The email includes their username and password.

Select **Send** and the email will be sent to the individual.

