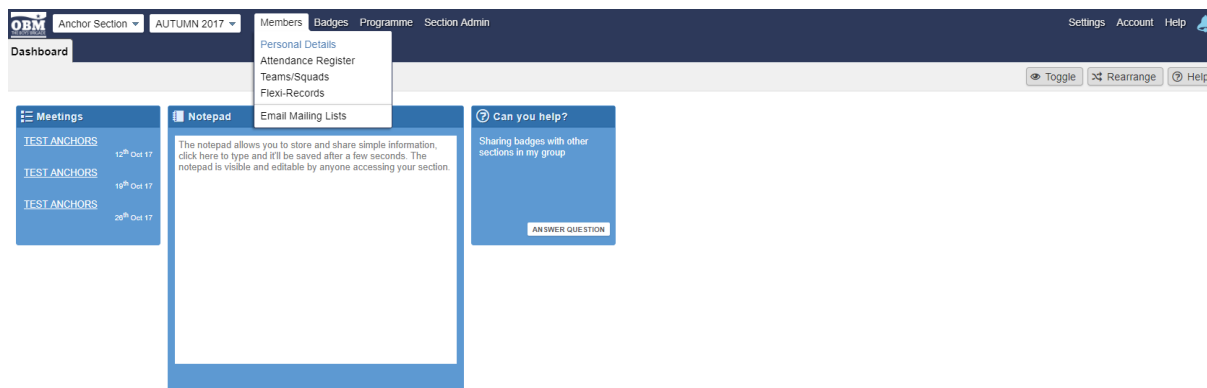


How to Remove a Young Person's Record on OBM

Go to the youth section that the record appears in

In the top left-hand corner, navigate between the different sections that you have access to. This will refresh your page on to a new dashboard. Then proceed to 'Members' along the top of the page, and in this drop down you will see 'Personal Details' – click on this and it will open a new tab for you.

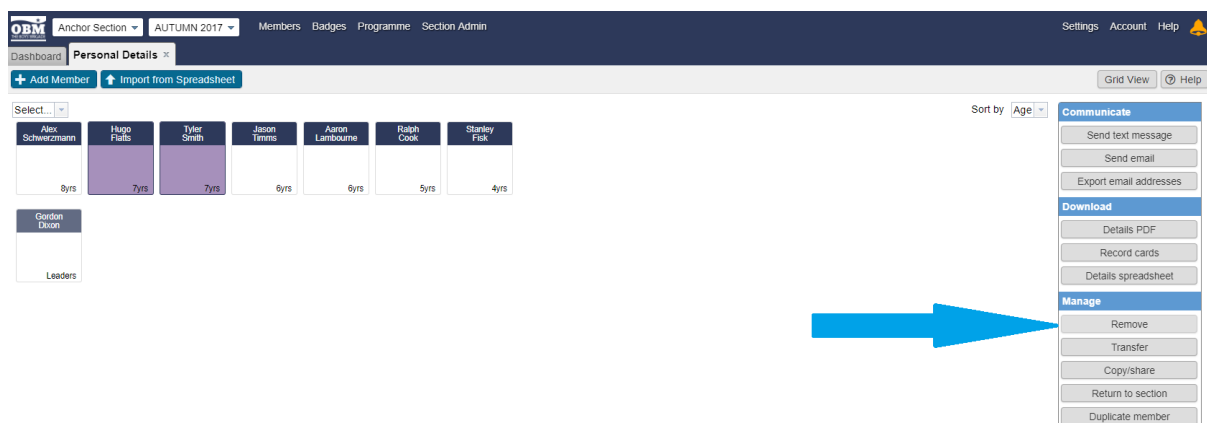


Selecting the record to remove

Important! This part is split in to two, depending on the view that you have selected. The 'Normal View' is where all records are listed in boxes, and 'Grid View' is similar to a spreadsheet layout.

'Normal View':

1. Click on the record of the young person that you wish to remove. The lower half of their box will change from a white background to a purple highlight. **Top tip!** It is possible to highlight multiple records at the same time to carry out the same action
2. On the right-hand side of the screen, select 'Remove' from the list of actions.
3. See page 2 for completing the 'Leaving Survey' (under the instructions for 'Grid View')



'Grid View':

1. Click on the row for the young person's record that you wish to remove. The entire row will change from a white background to a green highlight. **Top tip!** It is possible to highlight multiple records at the same time to carry out the same action by using the 'Ctrl' button

found in the left bottom corner of your keyboard – you will need to hold this key down whilst using the mouse to click on each row.

2. Underneath the grid with all the young people listed, are two drop down boxes. Use the drop box to the right-hand side of the word 'Actions', to select the option 'Remove'.
3. Click on the grey button 'Go' just to the right of the drop-down box you have just used.
4. See below for completing the 'Leaving Survey'

The screenshot shows the OBM system interface. At the top, there are navigation tabs for 'Anchor Section', 'AUTUMN 2017', 'Members', 'Badges', 'Programme', and 'Section Admin'. Below this is a 'Personal Details' section with buttons for 'Add Member' and 'Import from Spreadsheet'. A message states: 'There are 7 members and one leader. You have selected 2 members.' Below this is a table of members with columns for First Name, Last Name, Team/Squad, Age, Date of Birth, and Primary Contact 1. The table lists members: Gordon Dixon (Leaders), Alex Schweizmann (Unspecified), Hugo Flatts (Unspecified), Tyler Smith (Unspecified), Jason Timms (Unspecified), Aaron Lambourne (Unspecified), Ralph Cook (Unspecified), and Stanley Fisk (Unspecified). Below the table, there is an 'Actions' dropdown menu with a 'Go' button. The 'Remove' option is highlighted in the dropdown menu. Two blue arrows point to the 'Go' button and the 'Remove' option.

First Name	Last Name	Team/Squad	Age	Date of Birth	Primary Contact 1						
					First Name	Last Name	Relationship to member	Address 1	Address 2	Address 3	Town
Gordon	Dixon	Leaders	68 / 03	14/07/1949							
Alex	Schweizmann	Unspecified	08 / 09	07/01/2009	al	as					
Hugo	Flatts	Unspecified	07 / 08	23/01/2010							
Tyler	Smith	Unspecified	07 / 06	22/03/2010							
Jason	Timms	Unspecified	06 / 09	13/01/2011							
Aaron	Lambourne	Unspecified	06 / 08	04/02/2011							
Ralph	Cook	Unspecified	05 / 00	30/09/2012							
Stanley	Fisk	Unspecified	04 / 11	12/11/2012							

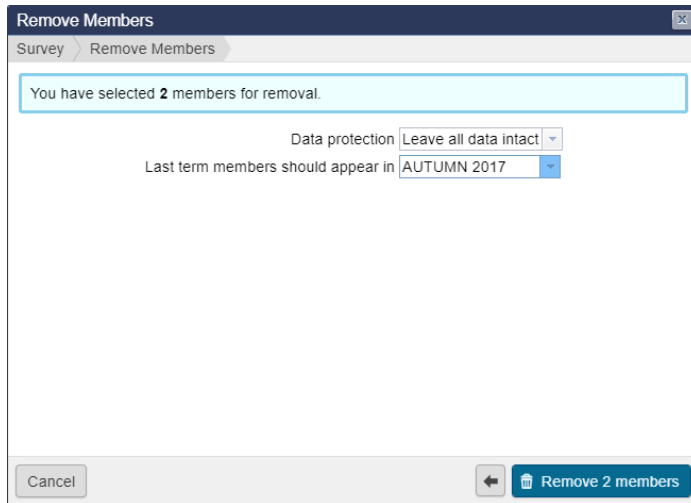
Completing the Leaving Survey

In the centre of your screen, the 'Leaving Survey' box will appear for you to undertake the following actions:

1. Select a reason for the young person leaving from the drop-down list available
2. Enter the date in which they left. **Top tip!** This can be done in two different ways; either manually enter the date yourself in the format of DD/MM/YYYY or use the drop-down option to select a date from a calendar view
3. Click on the button 'Next' in the bottom right-hand corner of the 'Leaving Survey'.

The screenshot shows the 'Leaving Survey' form. It has a title bar 'Leaving Survey' and a subtitle 'Survey Remove Members'. A message box says: 'Please complete this survey before removing the members.
 You must complete the survey for all members who are being removed.' Below this, there are two sections for members: 'Hugo Flatts' and 'Tyler Smith'. For Hugo Flatts, 'Why did the member leave?' is 'Moved away' and 'Date member left' is '01/09/2017'. For Tyler Smith, 'Why did the member leave?' is 'Not interested' and 'Date member left' is '06/09/2017'. At the bottom, there are 'Cancel' and 'Next' buttons.

4. On the next stage of removing the member, you will need to complete the bottom drop down option about which term the young person should last appear in. From the list please select the term in which they last attended the youth section.
5. Click on the button in the bottom right-hand corner to remove the member(s).



Please note that it is possible if you selected for the record to show in your current term, that they will appear in grey colouring afterwards. Although the record shows, they will be treated as inactive on OBM.

That's it, you've done it!

The member has now been removed from active membership, should they return at any point you should go back to the last term in which they were a member, click on the member and on the right-hand side of the screen select 'Return to Section' from the list of actions. The member will now show in 'Members' and 'Personal Details' in the current term.

If you require any assistance with the removal process you can contact the Support Team on 01442 231681 option 4 or support@boys-brigade.org.uk

Don't forget that there are OBM Support Sessions available outside of our normal hours (9am-5pm), and these times can be found in the Help section under News & Announcements (in the top right hand corner of your screen in OBM).