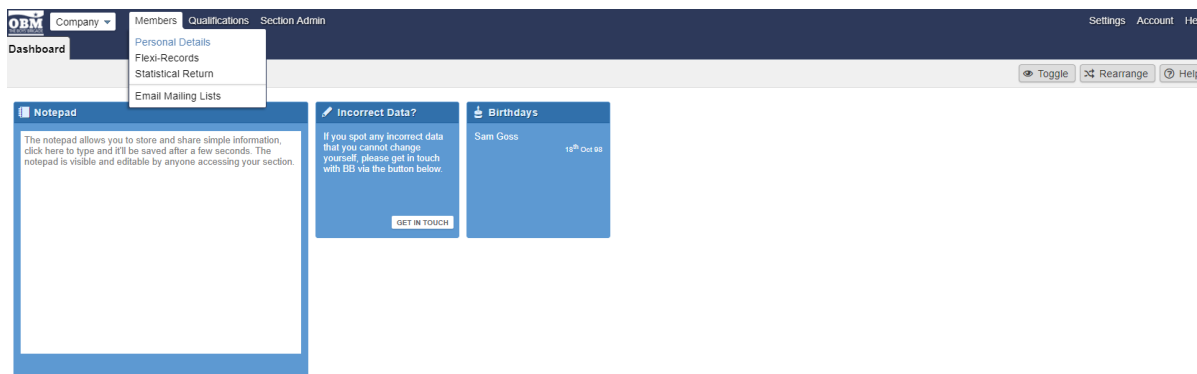


How to Remove a Leader's Record on OBM

Go to the 'Company' section

In the top left-hand corner, navigate to the 'Company' section. 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.

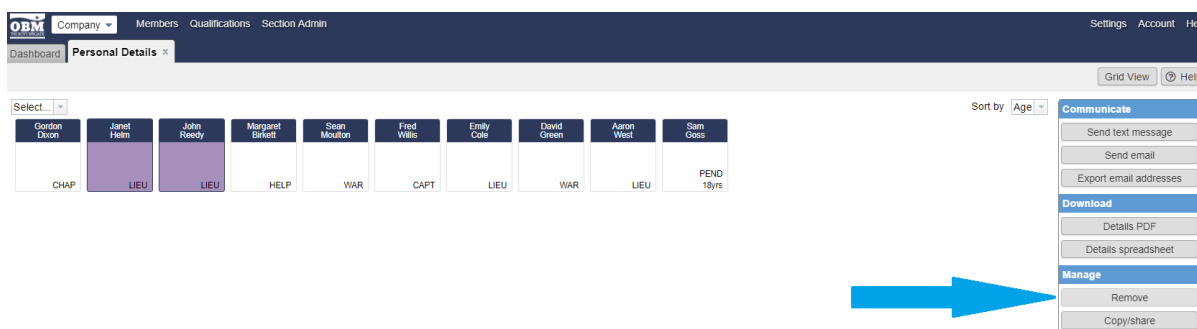


Selecting the record to remove

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 leader 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 leader'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 leaders 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: 'Company', 'Members', 'Qualifications', and 'Section Admin'. The 'Members' tab is active. Below the navigation, there is a 'Dashboard' and 'Personal Details' section. A message states: 'There are 10 members. You have selected 2 members.' Below this is a table with columns: 'First Name', 'Last Name', 'Date of Birth', and 'Member Contact Details'. The table lists 10 members, with two rows highlighted in green: Margaret Birkett (DOB: 19/12/1963) and Sean Moulton (DOB: 02/10/1971). Below the table is an 'Actions' menu with a 'Go' button and a dropdown list containing: '- Please select -', 'Send text message', 'Send email', 'Send email (OLD)', 'Export email addresses', 'Download details PDF', 'Download details spreadsheet', 'Remove', and 'Copy/share'. Two blue arrows point to the 'Go' button and the 'Remove' option in the dropdown menu.

Completing the Leaving Survey

After clicking 'Remove' 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 leader leaving from the drop-down list available. If required, there is a 'further details' box that can be completed to provide further information where appropriate.
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 in the bottom right-hand corner to remove the member(s).

The screenshot shows the 'Leaving Survey' dialog box. It contains a message: '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: 'Margaret Birkett' and 'John Reedy'. For Margaret Birkett, the 'Why did the member leave?' dropdown is set to 'Resigned', and the 'Date member left' is set to '04/10/2017'. For John Reedy, the 'Why did the member leave?' dropdown is set to 'Moved away'. At the bottom, there are 'Cancel' and 'Remove 2 members' buttons.

That's it, you've done it!

Once you have done this the leader will no longer be registered and should not have an active role working with children and young people in the Company. If the leader has other roles within The Boys' Brigade (i.e. Battalion/District or another Company) these will not be affected. Should this leader return to work in the Company they will need to complete a Leader registration form.

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).