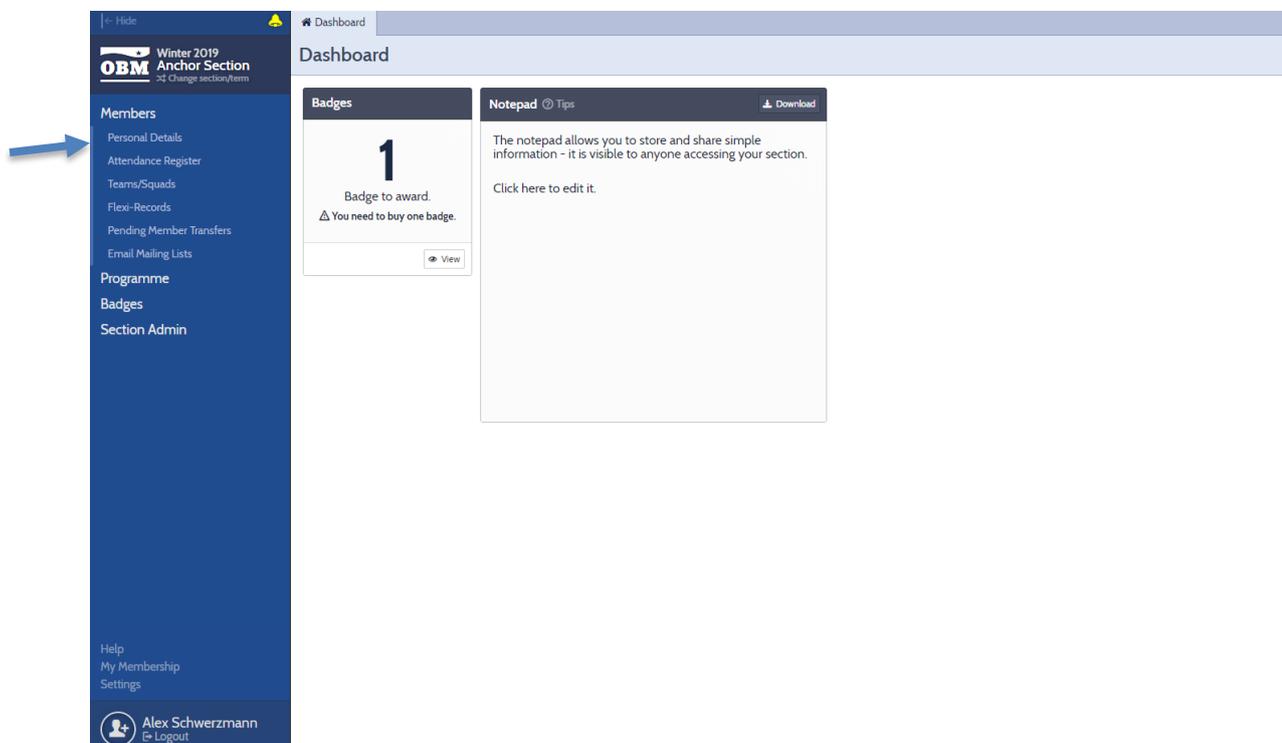


How to Remove a Young Person's Record on OBM

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 left-hand side 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 'Picture View' is where all records are listed in boxes, and 'Grid View' is similar to a spreadsheet layout.

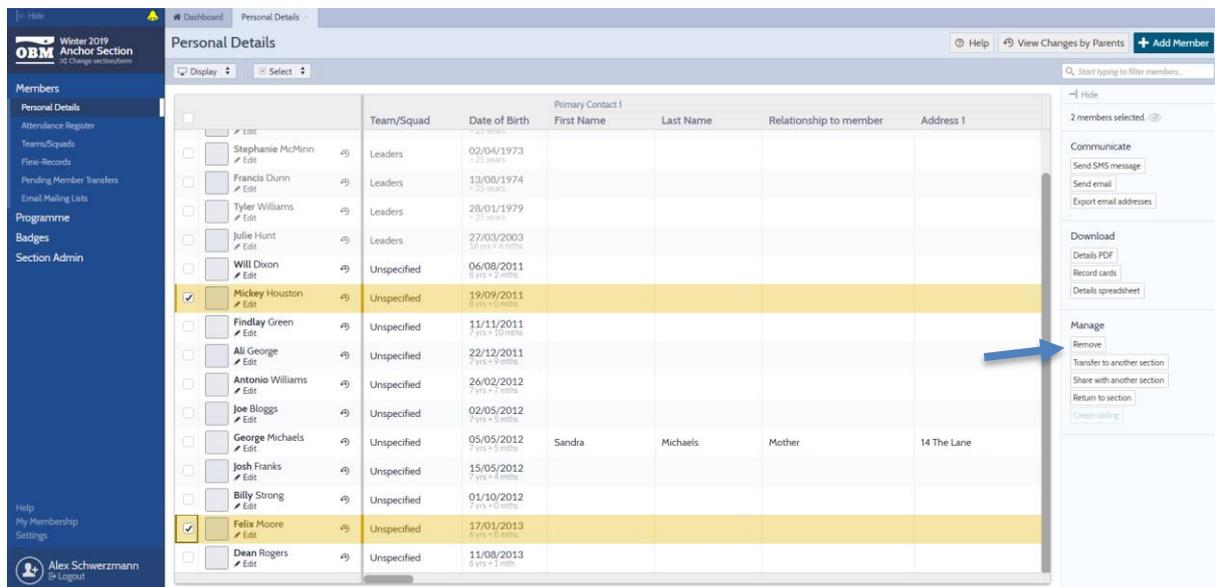
'Picture View':

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 blue 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 tick box to the left-hand side of the young person's record that you wish to remove. The entire row will change from a white background to a yellow highlight. **Top tip!** It is possible to highlight multiple records at the same time to carry out the same action by selecting the tick box next to each young person's name that you wish to remove.
2. On the right-hand side of the screen, select 'Remove' from the list of actions.
3. See below for completing the 'Leaving Survey'



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'.

Leaving Survey

Survey > Remove Members

Please complete this survey before removing the member.

Alex Schwerzmann

Why did the member leave? Required

Date member left Required

4. On the next stage of removing the member, you will need to complete the 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).

Remove Members

Survey > Remove Members

You have selected one member for removal.

Last term member should appear in Required

Members will not appear in your Personal Details page if they are active in another Section. They will appear everywhere else for you in terms between their start date and the term selected above.

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