# Getting Started on OBM (Company)

## 1. Accessing OBM for the first time

To access OBM type **http://obm.boys-brigade.org.uk** in your browser's address bar. You can also click on links found on the Leaders website.
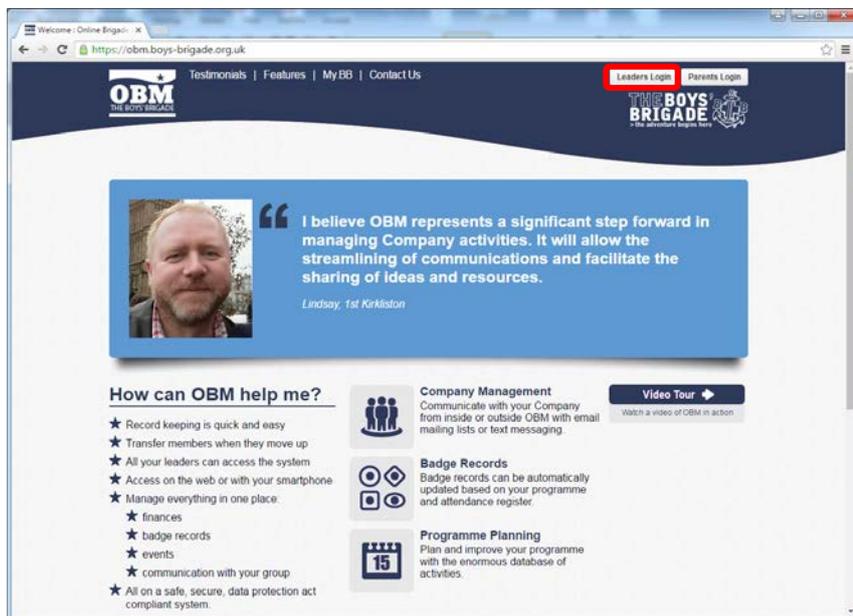


Once you have arrived on the OBM website, to login you will need to click '**Leaders Login**' at the top right corner of the page.
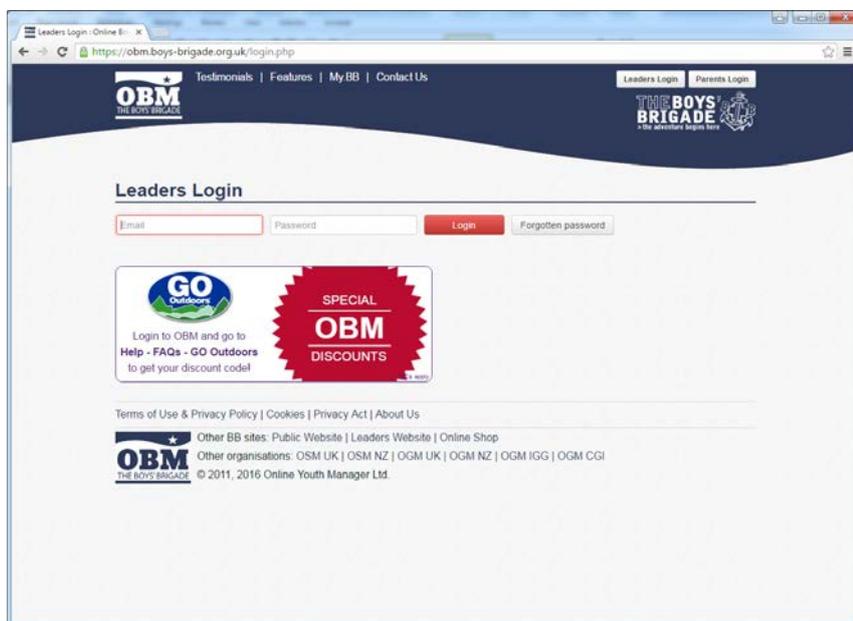


The user accounts for primary users of OBM including Company Captains, Battalion Secretaries and District Secretaries (England only) have already been created. Therefore to logon for the first time enter your email address (address currently registered with BB Headquarters) and click '**Forgotten Password**'. This will send an email to your registered email address with instructions on how to proceed in setting up your new password. You should note that the email should be received within a few minutes and you are required to click on the link in the email within 3 hours, after which the link will expire and you would have to go through the 'Forgotten Password' step again.

Once your have reset your password you will login using your email address and password, clicking the 'Login' button.
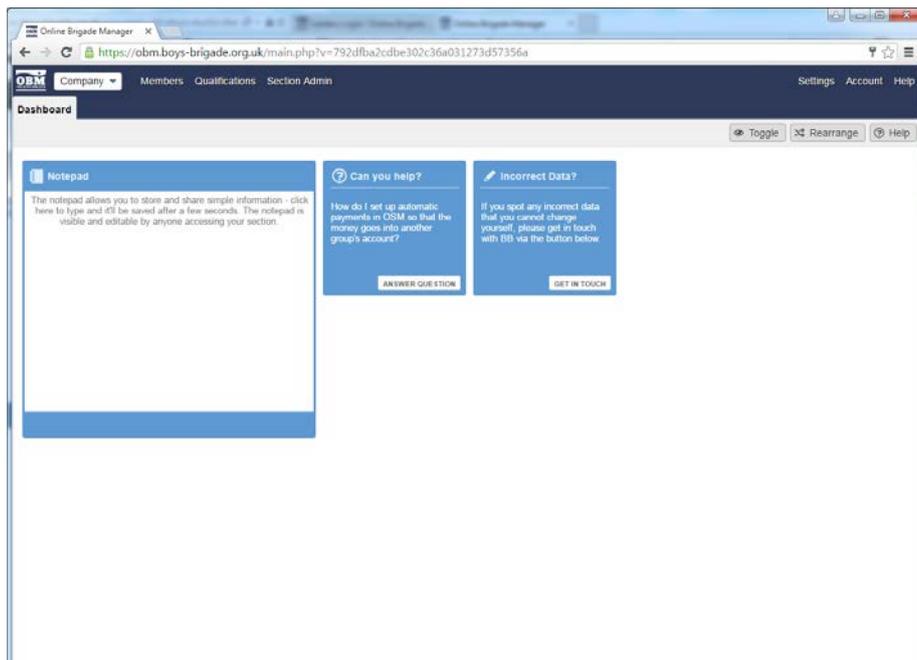


Upon successful login you will be presented with your Company dashboard.

## 2. Setting up your Sections

The next step is to setup your sections, you should do this before trying to add or change anything else in OBM. It is important to remember that settings are unique for each section and therefore each section needs to be setup individually, this is a one-off process.

The standard sections for a Company will include:
- Company (including Leaders)
- Anchor Section
- Junior Section
- Company Section
- Seniors
- Waiting List

Additional sections including 'Amicus' or multiple age group sections also will show where required. If you have a Battalion or District role you may also have access to other sections for the respective Battalion or District.

You can access different sections within your Company using the section viewer at the top left of the screen. Click on the down arrow to see a list of sections that you have a role in and therefore can access.

Each section has its own dashboard containing notifications on actions required, display information from within the section and also provides a place to record notes.
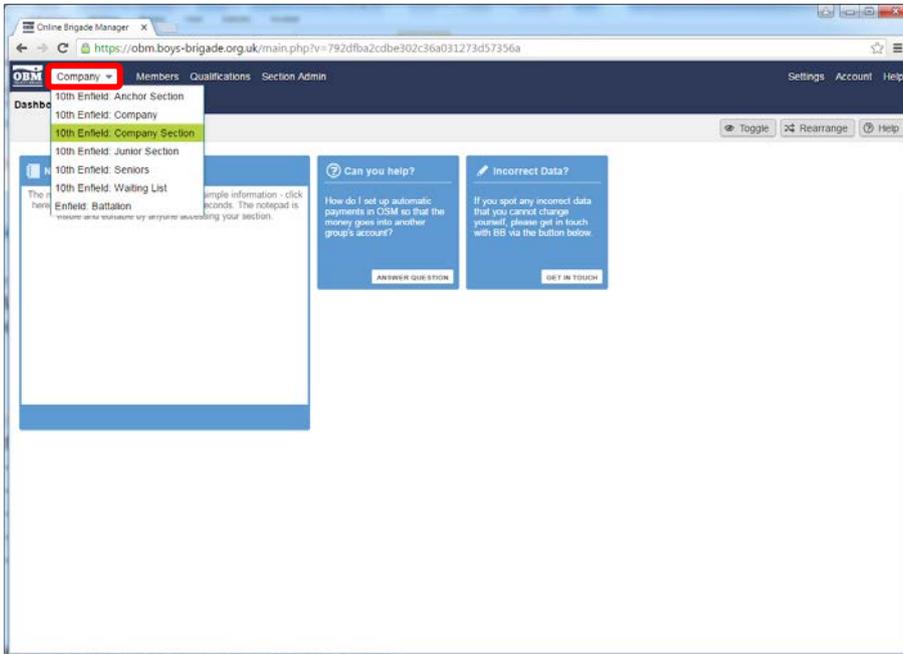
For each section go to the '**Settings**' menu in the top right corner and select '**Section Settings**', you should then go through the following:

- **Leader Access** – This is where you give access to other Leaders in your Company. By default the Company Captain will have access to all sections within the Company. To give access to other leaders you just need to type their email address in and click '**Add New User**'. In the screenshot below 'Alex Schwerzmann' has been added and by default has 'no permissions' in each of the dropdown boxes across the screen. You will need to select either 'Read only' or 'Read and Write' for the functionality that you want to give access to. Only give permissions for 'OBM Administration' if you want the user to be able to add or manage other leaders access. Once you add a user they will be sent an email to invite them to login to OBM.
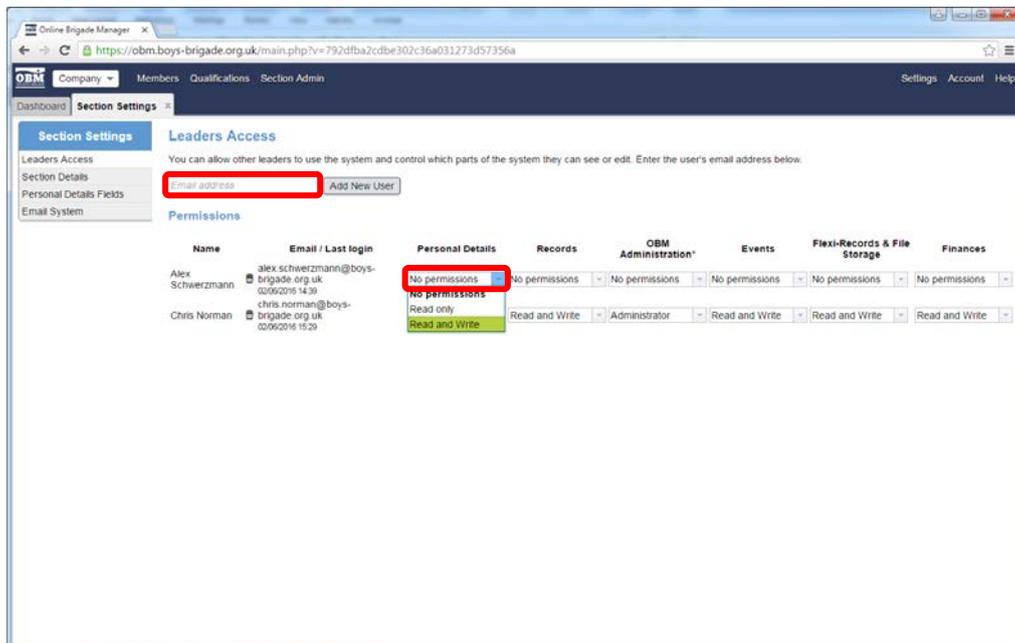


You can only give access to registered BB leaders within your own Company. You can remove access at any time by clicking on the 'rubbish bin' icon or changing permissions.

It is recommended that you give full 'Read and Write' permissions to Officer's in Charge for their particular age group, and also 'Read only' access to the age groups above and below.
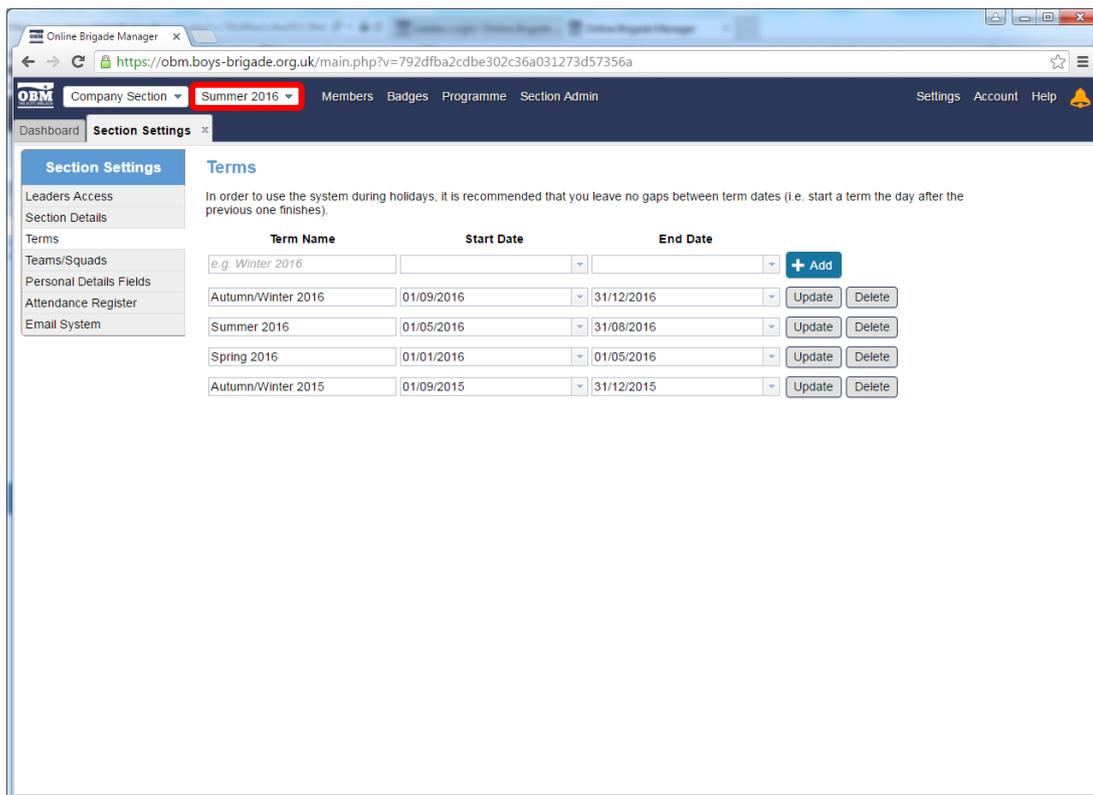
- **Terms**
  You will need to setup terms based on how you operate locally. Below shows a suggested way of splitting the BB session (1<sup>st</sup> September to 31<sup>st</sup> August) into three terms – Spring, Sumer, Autumn/Winter. You can create terms for any period that works for you, just input a 'Term Name' and Start and End date.

  Make sure you do not leave any gaps between terms, so for a term finishing on 31<sup>st</sup> August, the next term should start on 1<sup>st</sup> September.

  You can update or delete terms by clicking buttons as shown.

  You can switch between terms using the term viewer found at the top left of the screen next to the section viewer.



- **Teams/Squads**
  If you have teams or squads in your section, here you can set these up. Once setup and you have added children and young people into the section you will be able to assign them to a team or squad that you have created. You can also record points against teams/squads in the system or manage your programme and events by teams/squads. Teams/Squads could also work by way of identifying different year groups within the section. A member cannot only be assigned to one team/squad.

- **Personal Details fields**
  There is generally no need to make any immediate changes here, further down the line when you are using the system you may see benefit in making some changes.

- **Attendance Register**
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- **Email System**
  Here you can setup a mailing list to use for this section. It is recommend that you use something straight forward, as shown below using your Company name and section initials

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is one way of doing this e.g. 10enfieldcs (for 10<sup>th</sup> Enfield Company Section). Remember you will need to do the same for each section, so other sections could be '10enfieldjs' etc.

Once you have inputted the address and ticked 'Live' click 'Save'. A list of email addresses will be shown in the list box below. As you create events and teams/squads it will automatically create additional mailing lists for you to make use of.
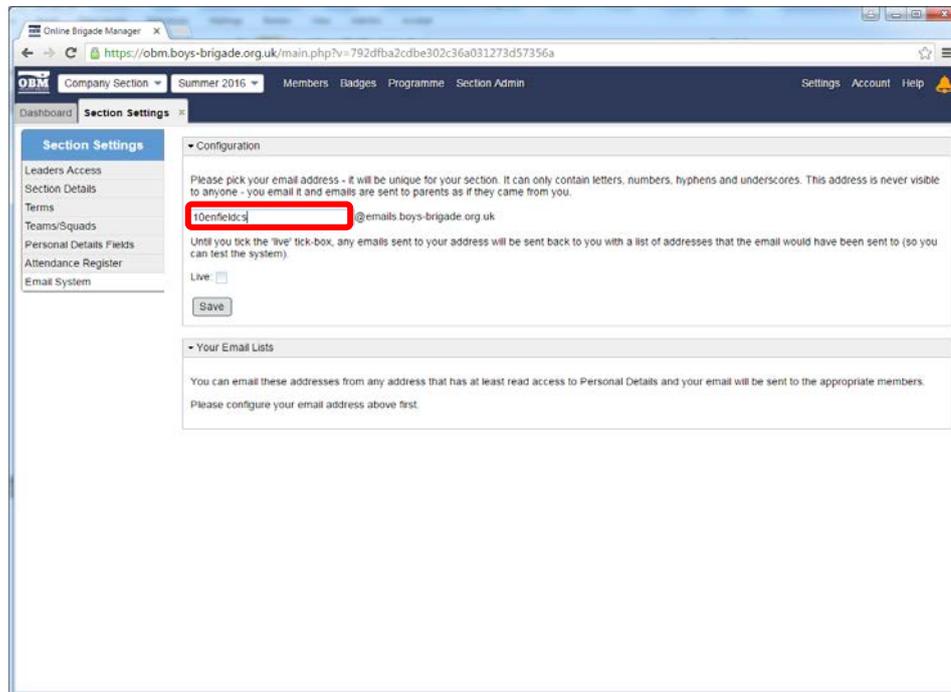


That's all the settings done, remember to do this for each section in OBM.

## 3. Adding/Importing Children/Young People

To add or import children and young people into each section, select the section and then go to '**Members**' menu and select '**Personal Details**'.
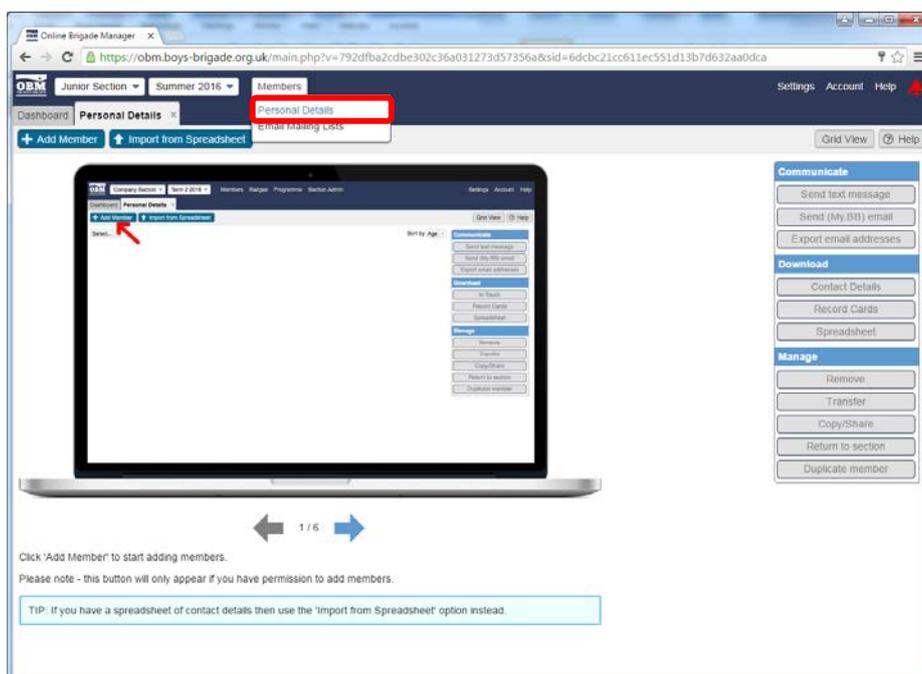


You can now add members individually by clicking 'Add Member' or use the 'Import from Spreadsheet' functionality. The 'Import from Spreadsheet' will get you going nice and quickly if you already have data

for young people held in a spreadsheet. You will find step by step instructions online for adding members through either method as shown.

To get going quickly you may just want to add the required fields including first name, last name, joined movement, joined section, date of birth and gender. You can always come back at a later date and populate other fields.

Once you have successfully added young people these will be displayed as per the screenshot below.
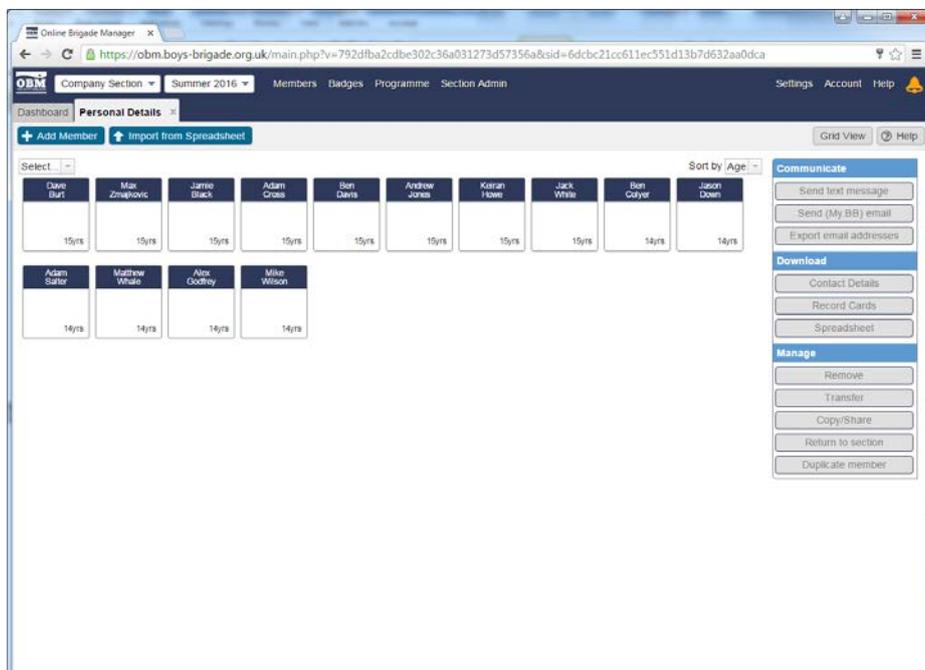


It is useful to add leaders into the youth sections so that you can easily email leaders, track their event attendance etc along with the young people. To do this, use the Copy/Share button from the Company's (Leaders) Personal Details area to copy them into the specific youth section. You can copy leaders into multiple youth sections.
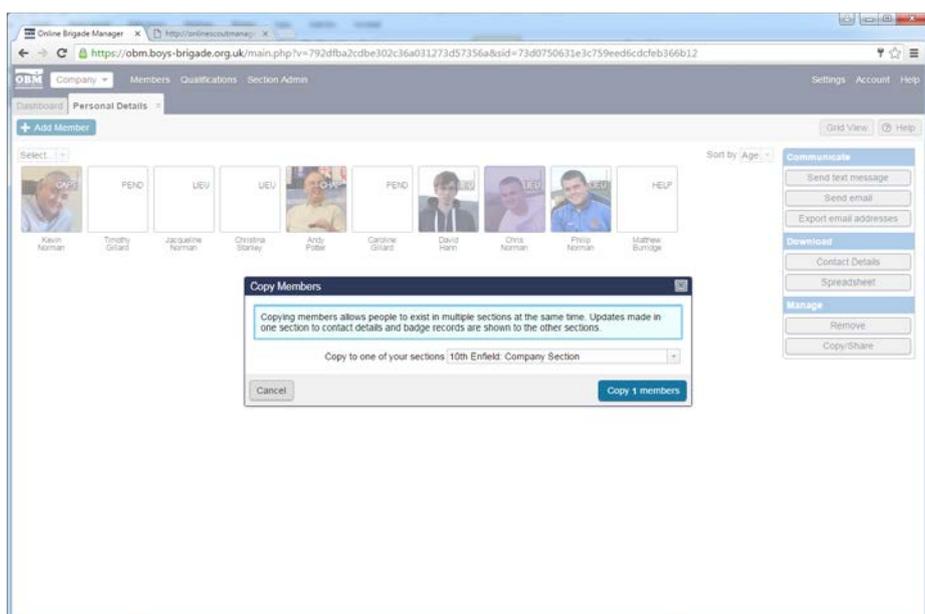


Once you have copied them in you will need to go back to the youth section you have copied them to, on the dashboard you will see a notification that a member has been transferred and you will need to accept this transfer before the leader will appear in that section.
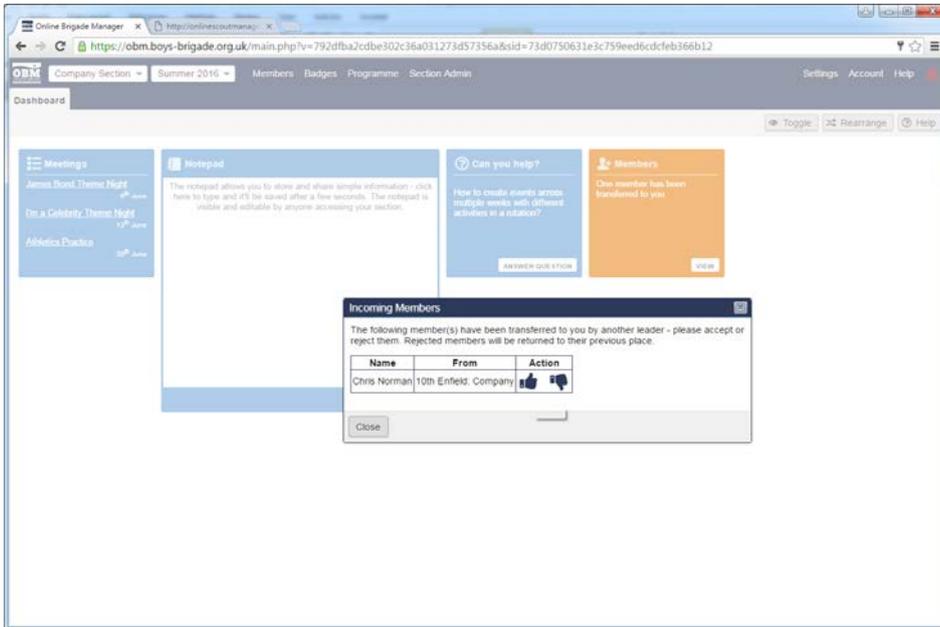
Once added you should put the Leader into the automatically created 'Leaders' team with the youth sections personal details view.
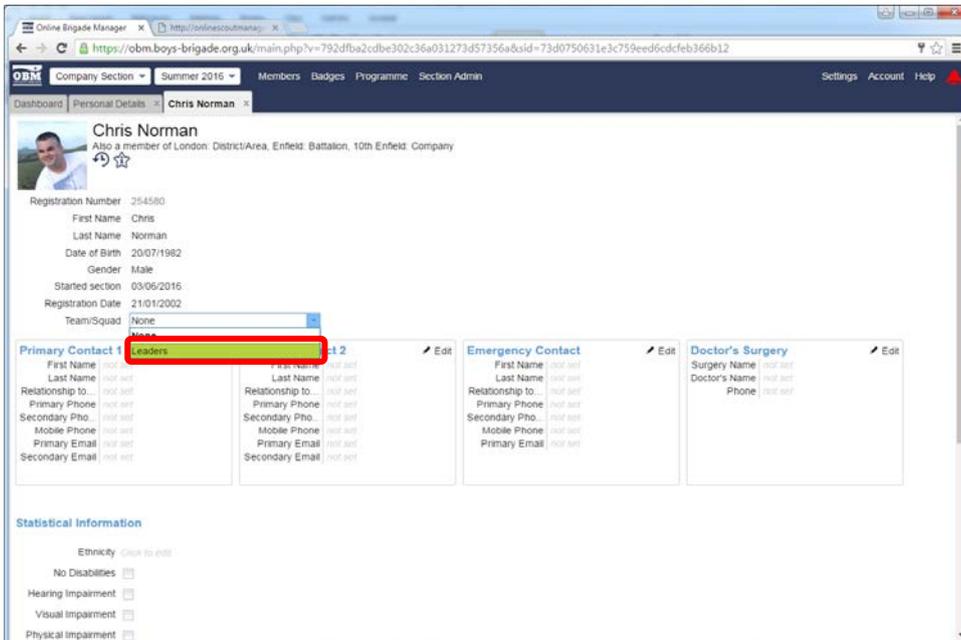


Once you have assigned the leader to the 'Leaders' Team they will then appear separately below the young people within that section.

### 4. Adding Badge / Programme Records

Go to '**Badges**' and '**Programme Awards**' to get started. You will be able to quickly and easily tell OBM which badges you have already awarded using the 'Getting Started' functionality. You will be presented with this when first going into this part of the system.

Just click on the badges for each young person where these have already been awarded. All these badges will now be marked as awarded (on date as shown in box) and show in the individual badges or the 'Badges by Person' summary.
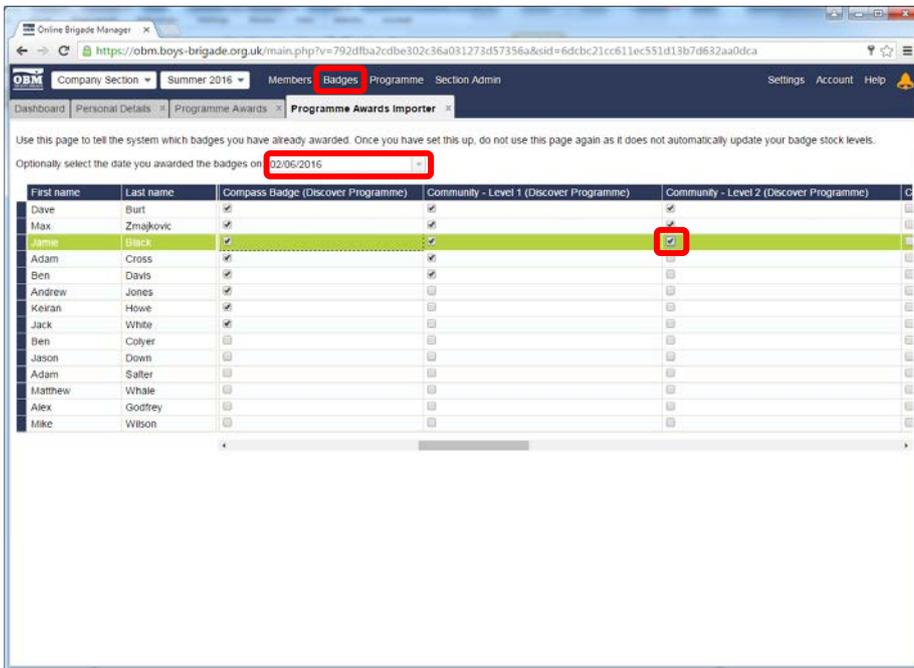
Next, you will want to add in any progress made towards other badges within the programme. To do this select each badge and add in the title or the activity or date it was completed. The logic built into OBM will know when the badge is completed and is due to be awarded.
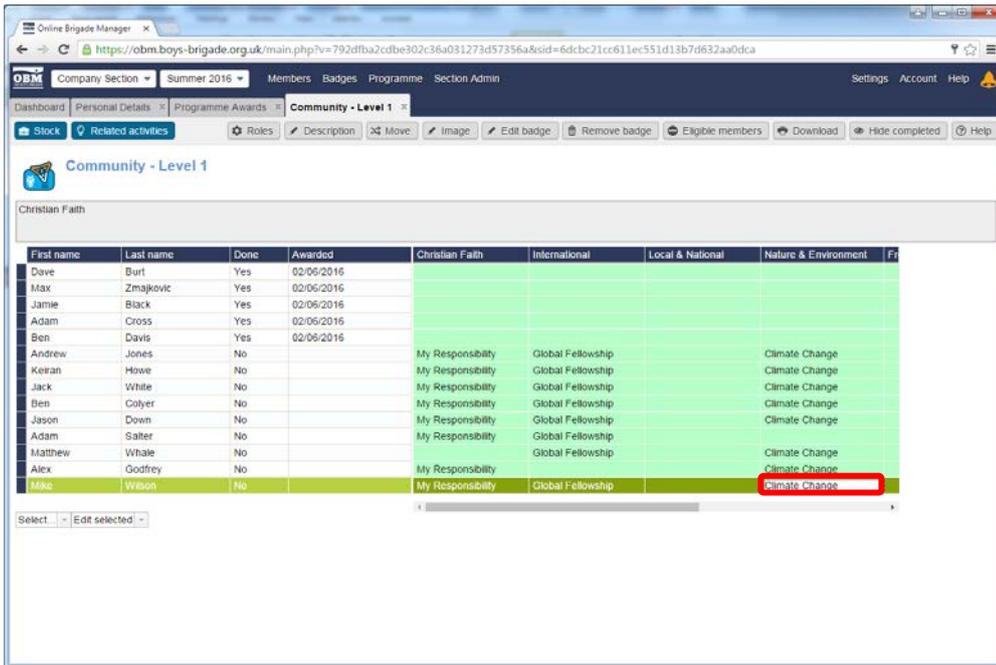


Go through and do this for each of the badges.

**5. Setting up My.BB**

My.BB is the parent/carer portal that is part of OBM. Before getting going with My.BB it is important to go through the settings and decide how you want it to operate within your Company and specifically for each section (again, each section is setup separately).

You will also want to give advance notification to parents/carers of your intention to start using the system, before inviting them by email.

So firstly, go through the following settings:

- **Noticeboard -** The noticeboard allows you to display a message to all parents when they login or click the noticeboard link at the top of the page (see example below).
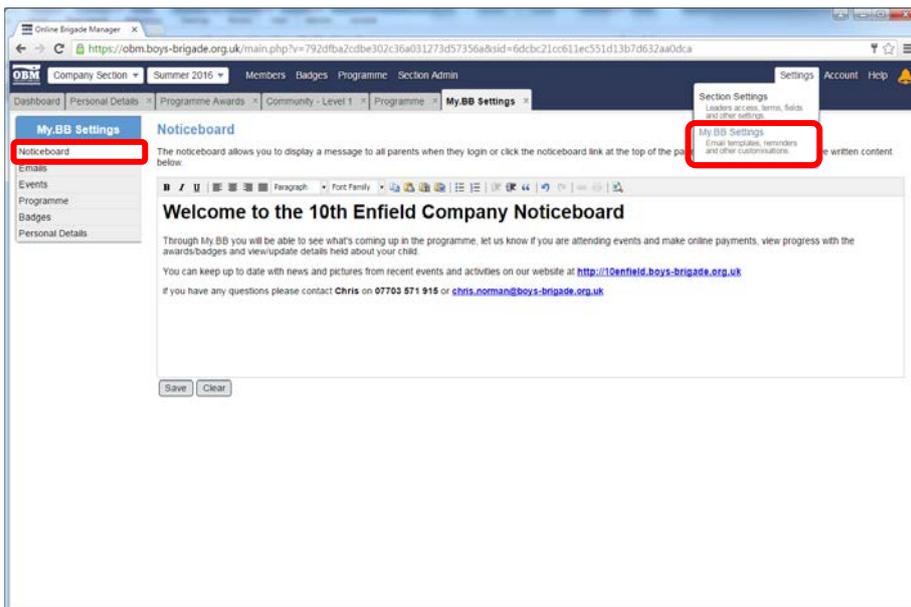


- **Email -** You can set the email address that is used as the sent 'from' address. It is recommended that you put your Company (or Officer in Charge's) email address in here.

  Here you can also customise the email templates for emails sent from My.BB to parents/carers. You could include contact details for leaders or other details. Be careful to follow on screen instructions and not delete data fields.
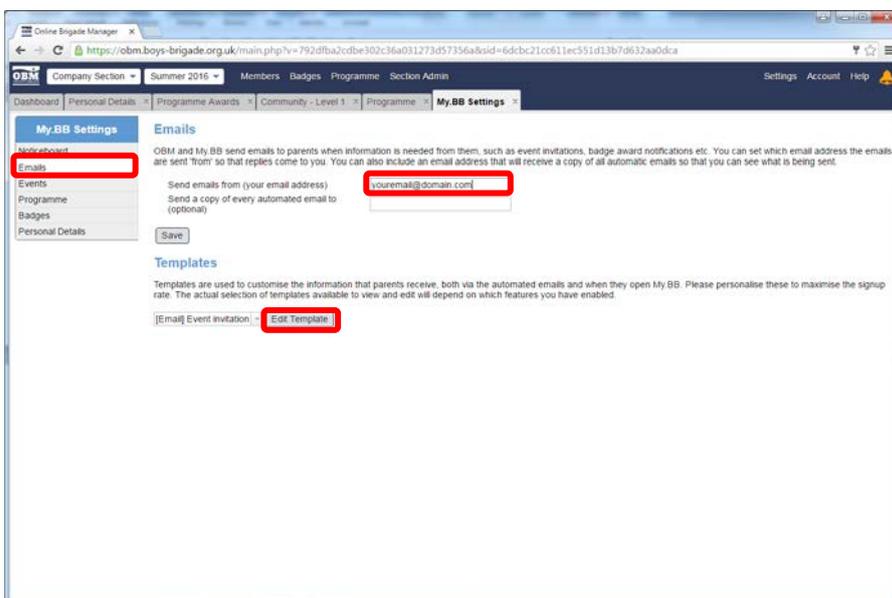


- **Event reminders -** OBM can automatically remind parents/carers of upcoming events. Set these options if you want to enable these reminders, it recommended you go with a frequency of 10 days and set the maximum number to 3. Reminders will only be sent where they have not indicated attendance.
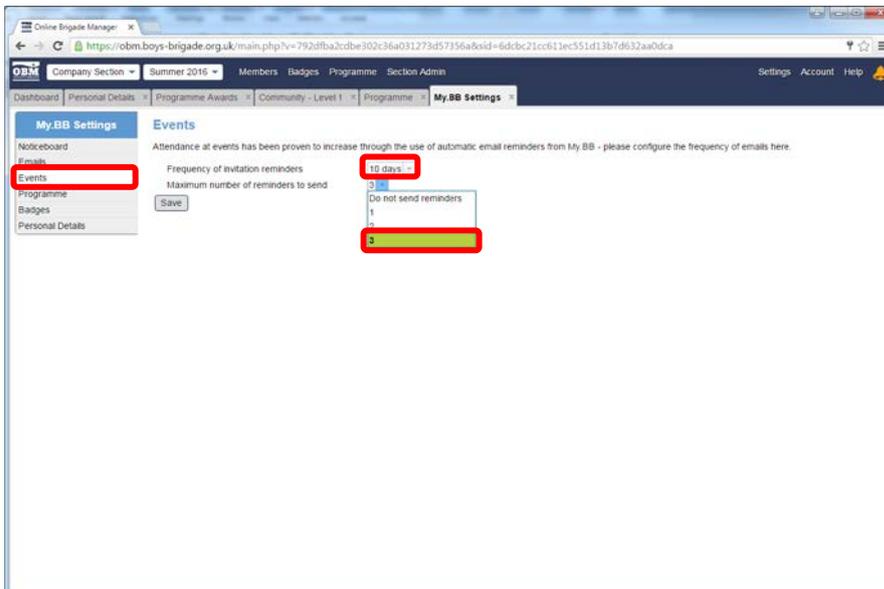
- **Programme / Badges / Personal Details**
  On each of these menus, you need to decide which options you want to show within My.BB.

## 10. You're ready to go!

With all the setup complete you can now start to use OBM. There are lots of other areas of functionality within OBM not covered by this document, you will find step by step guides and help within OBM by going to the 'Help' menu in the top right hand corner of the window.

**Some IMPORTANT notes:**
- OBM uses a default date of **01/01/2016**, so where you see this date it is because no date was previously recorded.
- Registration dates for individuals and Companies in OBM pre-2003 will not reflect original registration dates. This is due to dates not being carried over from a previous database. Many Companies will have a default registration date of 01/01/1992.

The above should not cause immediate concern, but should you be able to provide the correct information then please contact the Membership Team and we will be happy to verify and then update the records accordingly.

The Membership Team can be contact via email at membership@boys-brigade.org.uk or by phone on 01442 231 681 (option 4).