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 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.

	← Hide	# Dashboard					
	Company	Dashboard					
	Change section/term	Incorrect Data?	Notepad	4. Download			
	Members						
-	Personal Details Flexi-Records	If you spot any incorrect data that you cannot	The notepad allows you to store and share simple information - it is visible to anyone accessing your	section.			
	Statistical Return	get in touch with BB via the button below.	Click here to edit it.				
	Email Mailing Lists						
	Membership Summary	\mathscr{O} Get in touch					
	Qualifications						
	Section Admin						
	Help My Membership Settings						
	Alex Schwerzmann						

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.

'Picure 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 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').

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Company OBM	Personal Details Image: Personal Details								
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Members	-1 Hole								
Personal Details									2 members selected
Flexi-Records									
Statistical Return	Terry	Clive	Hugh	John	Grant	Francis	Tyler	Amy	Communicate
Email Mailing Lists	Gubbins	Jeffries	Brennan	Jarvis	Tate	Dunn	Williams	Kaley	Send SMS message
Membership Summary	LIEU	AMIC	HELP	LIEU	WAR	CHAP	HELP	WAR	Send email
Qualifications									Export email addresses
Section Admin									
									Download
	D.111	0.00							Details PDF
	Monkey	Julie Hunt							Details spreadsheet
	CAPT	YL							
		15 yrs + 1 mth	J						Manage
									Remove
									Transfer to another section
									Share with another section

'Grid View':

1. Click on the tick box to the left-hand side of the leader's name 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 leader'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'

← Hide	We Dashboard Personal Details ×									
OBM Company	Personal Details	Help + Add Member								
A, Change securitytenn	🖵 Display 🗘 🗵 Select 🗘	Display 🗘 🗵 Select 🗘								
Members								→ Hide		
Personal Details				Member Contact Details				2 merels and a studied and		
Flexi-Records			Date of Birth	Address 1	Address 2	Address 3	Town	2 members selected.		
Statistical Return	Terry Gubbins	19	05/06/1948					Communicate		
Email Mailing Lists	Clive Jeffries	19	17/11/1954					Send SMS message		
Membership Summary	Hugh Brennan	19	22/07/1968					Send email		
Qualifications	John Jarvis	19	20/08/1968					Export email addresses		
Section Admin	Grant Tate	19	14/01/1971							
	Francis Dunn	19	13/08/1974					Download		
	Tyler Williams	19	28/01/1979					Details PDF		
	Amy Kaley	19	29/06/1982					Details spreadsheet		
	Robbie Monkey	19	22/04/1984	1 Missing Lane			Island			
	🛕 Julie Hunt	19	27/03/2003					Manage		
								Remove		
								Transfer to another section		
								Share with another section		

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:

- 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 calendar icon 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).

Leaving Survey	×				
Please complete this survey before removing the member.					
Hugh Brennan					
Why did the member leave? Required Further details	Moved away				
Date member left Required	25/05/2018				
Cancel	🛱 Remove 1 member				

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