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':

- 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')

| + Hide 👃 | # Dashboard Per | sonal Details | | | | | | | | | | | |
|-----------------------------------|-----------------|--|-----------------|----------------|---------------------|----------------|----------------|----------------|----------------|----------------|-----------------------------|--|--|
| Winter 2019 ORM Anchor Section | Personal Def | Personal Details Deteins Details Details | | | | | | | | | | | |
| 22 Ourge section/term | Display 🗘 | Q. Start typing to filter members | | | | | | | | | | | |
| Members | | | _ | _ | - | | | _ | _ | | Hide | | |
| Personal Details | | | | | | | | | | | 2 members selected. ④ | | |
| Attendance Register | | 100000 | | | | | | o. 32 | 5623 | | | | |
| Flexi-Records | Will | Mickey Houston | Findlay | Ali George | Antonio Williams | Joe Biogra | George | Josh Franks | Billy | Felix Moore | Communicate | | |
| Pending Member Transfers | 8 yrs + 2 mths | 8 yrs + 0 mths | 7 yrs + 10 mths | 7 yrs + 9 mths | 7 yrs + 7 mths | 7 yrs + 5 mths | 7 yrs + 5 mths | 7 yrs + 4 mths | 7 yrs + 0 mths | 6 yrs + 8 mths | Send email | | |
| Email Mailing Lists | | | | | | | | | | | Export email addresses | | |
| Programme | | | | | | | | | | | | | |
| Badges | | | | | | | | | | | Download | | |
| Section Admin | Dean | | | | | | | | | | Details PDF Record cards | | |
| | 6 yrs +1 mth | | | | | | | | | | Details spreadsheet | | |
| | | ļ | | | | | | | | | | | |
| | | | | | | | 1 | | | | Manage | | |
| | | | | | | | | | | | Remove | | |
| | Clive | Hugh | Stephanie | Francis | Tyler | India | | | | | Share with another section | | |
| | (effice. | Brennan | McMine | (Dam) | Williams | Humi | | | | | Return to section | | |
| | Leader | Leader | Leader | Leader | Leader | Leader | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Help | | | | | | | | | | | | | |
| My Membership Settings | | | | | | | | | | | | | |
| <u> </u> | | | | | | | | | | | | | |
| Alex Schwerzmann | | | | | | | | | | | | | |

'Grid View':

- 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'

| Hide | 4 | W Dashbo | ard Personal Details | | | | | | | | |
|-------------------------------|---|----------|--|----|-------------|-------------------------------|-------------------|-----------|------------------------|-------------|---------------------------------------|
| Winter 2019 Anchor Section | | Persor | ersonal Details 💿 Help 🔊 View Changes by Parents 🕇 Add Membe | | | | | | | | |
| 32 Change section/term | | 🖵 Displa | iy \$ ⊡ Select \$ | | | | | | | | Q. Start typing to filter members |
| embers | | _ | | | 1 | | | | | | →l Hide |
| Personal Details | | | | | Team/Sound | Date of Birth | Primary Contact 1 | Last Name | Palationship to member | Addross 1 | 2 members selected. |
| ttendance Register | | L | J / LOR | | reanysquad | Pare of birth | Tust Warne | Last Hame | Relationship to member | Address I | |
| enns/Squeds exi-Records | | 0 | Stephanie McMinn Z Edit | Ð | Leaders | 02/04/1973 + 25 years | | | | | Communicate Send SMS message |
| | | 0 | Francis Dunn | 49 | Leaders | 13/08/1974 > 25 years | | | | | Send email |
| nail Mailing Lists gramme | | 0 | Tyler Williams | 49 | Leaders | 28/01/1979 | | | | | Export email addresses |
| dges | | OI | Julie Hunt | Ð | Leaders | 27/03/2003 | | | | | Download |
| ction Admin | | 0 | Will Dixon | ŋ | Unspecified | 06/08/2011 | | | | | Details PDF Record cards |
| | | | Mickey Houston | Ð | Unspecified | 19/09/2011 8 yrs + 0 mths | | | | | Details spreadsheet |
| | | 0 | Findlay Green | Ð | Unspecified | 11/11/2011 7 yrs + 10 mths | | | | | Manage |
| | | 0 | Ali George | Ð | Unspecified | 22/12/2011 7 yrs + 9 mths | | | | | Remove Transfer to another section |
| | | 0 | Antonio Williams | Ð | Unspecified | 26/02/2012 7 yrs + 7 mths | | | | | Share with another section |
| | | 0 | Joe Bloggs | Ð | Unspecified | 02/05/2012 7 yrs + 5 mths | | | | | Return to section |
| | | 0 | George Michaels | 9 | Unspecified | 05/05/2012 7 yrs + 5 mths | Sandra | Michaels | Mother | 14 The Lane | |
| | | 0 | Josh Franks / Edit | 9 | Unspecified | 15/05/2012 7 yrs + 4 mths | | | | | |
| | | | Billy Strong | 9 | Unspecified | 01/10/2012 7 yrs + 0 mths | | | | | |
| Membership ings | | | Felix Moore | ŋ | Unspecified | 17/01/2013 6 yrs + 8 mths | | | | | |
| Alex Schwerzmann | | 0 | Dean Rogers | 9 | Unspecified | 11/08/2013 6 yrs + 1 mth | | | | | 1 |
| E+ Logout | | | | | - | | | | | | |

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 | Moved away 🗘 | | | | | | |
| Date member left Required | 30/08/2019 | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Cancel | Next → | | | | | | |

- 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 | Summer 2019 🗘 | | | | | | | |
| should appear in | 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. | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| Cancel | 🗲 💼 Remove one member | | | | | | | |

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 righthand 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