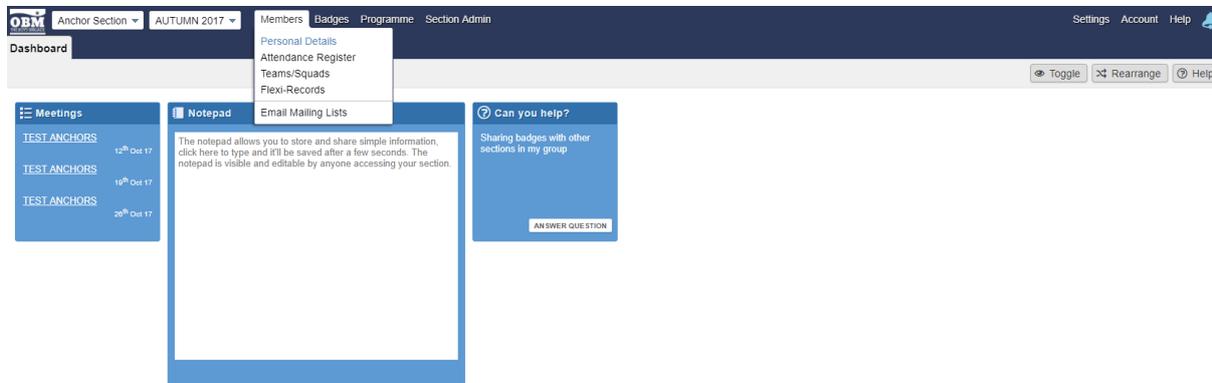


Transfer a Young Person's Record Between Youth Sections on OBM

Go to the youth section that the record currently 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 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.

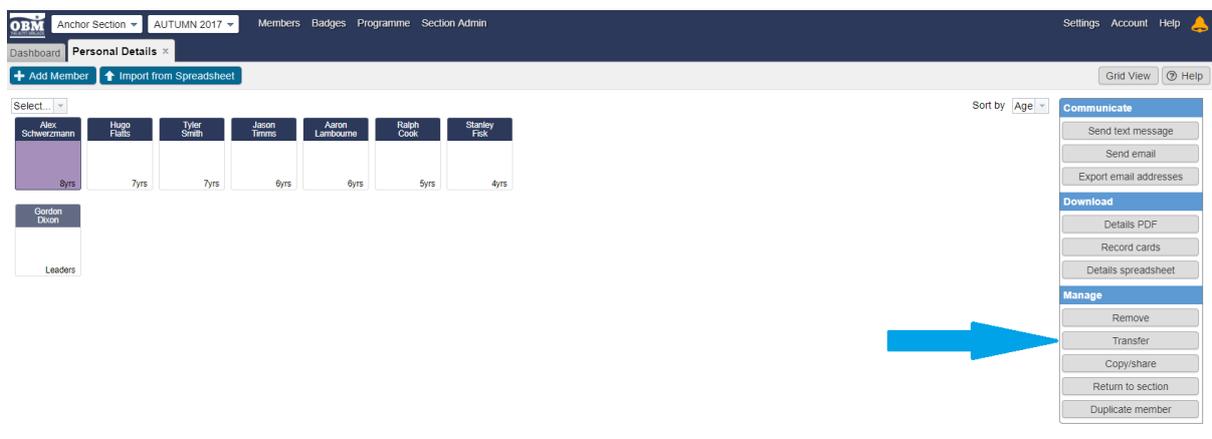


Selecting the record to transfer

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 young person that you wish to transfer. 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 'Transfer' from the list of actions.
3. See page 2 for completing the 'Transfer Members' details (under the instructions for 'Grid View')



'Grid View':

1. Click on the row for the young person's record that you wish to transfer. 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 young people listed, are two drop down boxes. Use the drop box to the right-hand side of the word 'Actions', to select the option 'Transfer'.
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 'Transfer Members' details

The screenshot shows the OBN system interface. At the top, there are navigation tabs: 'Anchor Section', 'AUTUMN 2017', 'Members', 'Badges', 'Programme', and 'Section Admin'. Below this is a 'Personal Details' section with buttons for '+ Add Member' and '+ Import from Spreadsheet'. A message states: 'There are 7 members and one leader. You have selected one member.' Below this is a table of members:

First Name	Last Name	Team/Squad	Age	Date of Birth	Primary Contact 1	First Name	Last Name	Relationship to member	Address 1	Address 2	Address 3	Town
Gordon	Dixon	Leaders	68 / 03	14/07/1949								
Alex	Schwerzmann	Unspecified	08 / 09	07/01/2009	al	as						
Hugo	Flatts	Unspecified	07 / 08	23/01/2010								
Tyler	Smith	Unspecified	07 / 06	22/03/2010								
Jason	Timms	Unspecified	06 / 09	13/01/2011								
Aaron	Lambourne	Unspecified	06 / 08	04/02/2011								
Ralph	Cook	Unspecified	05 / 00	30/09/2012								
Stanley	Fisk	Unspecified	04 / 11	12/11/2012								

Below the table, there is an 'Actions' dropdown menu. The 'Go' button is highlighted with a blue arrow. The 'Transfer' option is also highlighted with a blue arrow.

Completing the Transfer

In the centre of your screen, the 'Transfer Members' box will appear for you to undertake the following actions:

1. Select the youth section to transfer the young person's record to with one of following options (this is applicable for the first two drop-down options only depending on what access you may have to each section for your Company):
 - a. If you have access to the youth section you are transferring the member to, use the first drop-down menu to select the youth section. Then go to step 2.
 - b. If you do not have access to the youth section you are transferring the member to, use the second drop-down menu line to:
 - i. Select the type of youth section in the first drop-down (i.e. Anchor Section)
 - ii. Type the name of the Company in the second box to bring up the section (i.e. 1st Glasgow).
2. In the final drop-down menu, you will need to state which term the young person should last appear in. From the list please select the term in which they last attended the youth section.
3. Click on the button in the bottom right-hand corner to transfer the member.

The 'Transfer Members' dialog box contains the following text and fields:

Only transfer members when you no longer need to edit any of their details.
Transferring members cancels all direct debits.

Transfer to one of your sections: 1st Test Support: Junior Section

Or search all sections: Age range: Company:

Last term members should appear in your section: AUTUMN 2017

Buttons: Cancel, Transfer 1 members

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 to indicate they are not an active member.

Accepting the Transfer

Now that the young person's record has been transferred, the receiving youth section will need to accept the transfer. **Important!** If you do not have access to the youth section that the record has been transferred in to, then you will need to ask another leader with access to it to complete this final step.

1. Go to the youth section via the white drop-down menu in the top left-hand corner.
2. On the dashboard there will be an orange box, informing you that a member has been transferred to the section. Click on the 'View' button in this orange box
3. This will open up an 'Incoming Members' box in the centre of your screen. Select the 'thumbs up' icon to accept the transfer of the young person in to the youth section. If for any reason you decline the transfer then the member will remain in the original section.

The screenshot displays two overlapping interface elements. On the left is a window titled 'Incoming Members' with a close button in the top right. Inside this window, a light blue box contains the text: 'The following member has been transferred to you by another leader - please accept or reject them. Rejected members will be returned to their previous section.' Below this is a table with three columns: 'Name', 'From', and 'Action'. The table contains one row for 'Alex Schwerzmann' from '1st Test Support: Anchor Section', with 'thumbs up' and 'thumbs down' icons in the 'Action' column. A 'Close' button is at the bottom left of the window. On the right is an orange panel titled 'Members' with a close button in the top right. It contains the text: 'One member has been transferred to you.' and a 'VIEW' button at the bottom right.

Name	From	Action
Alex Schwerzmann	1st Test Support: Anchor Section	

That's it, you've done it!

If you require any assistance with the transfer 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).