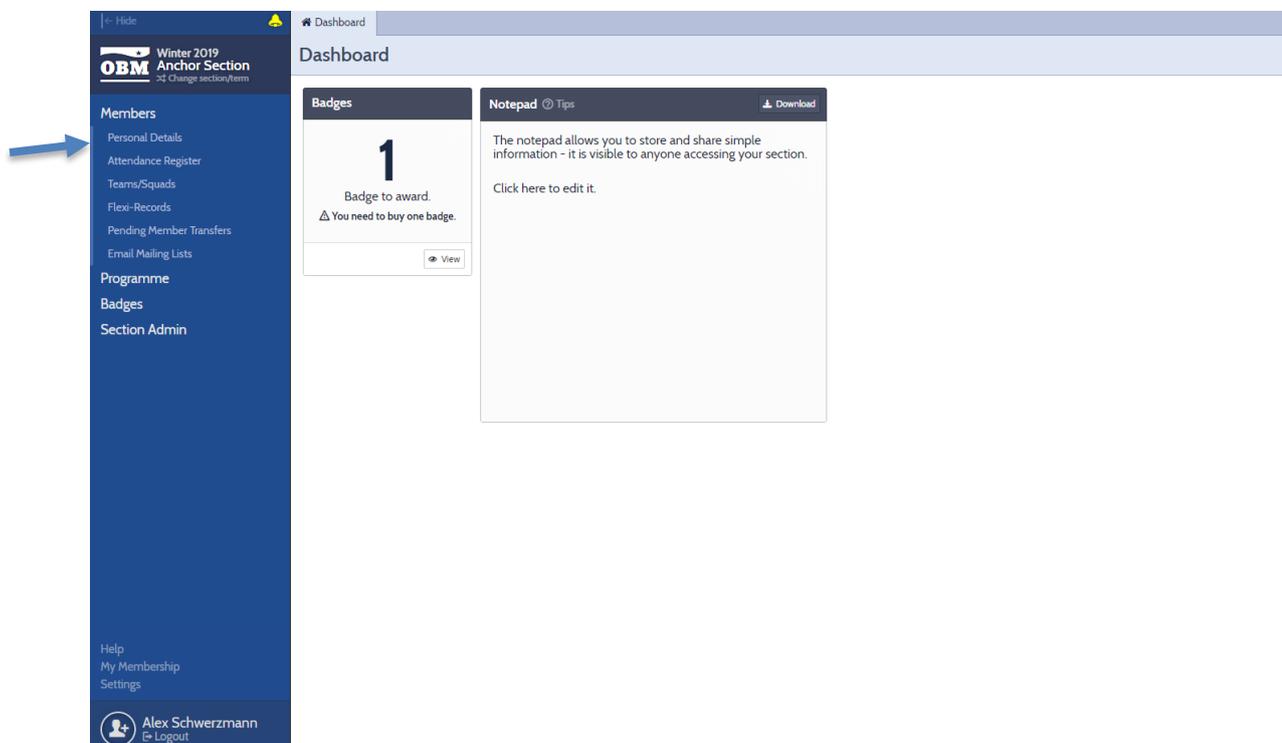


# Transfer a Young Person's Record Between Youth Sections on OBM

## 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 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 transfer

**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.

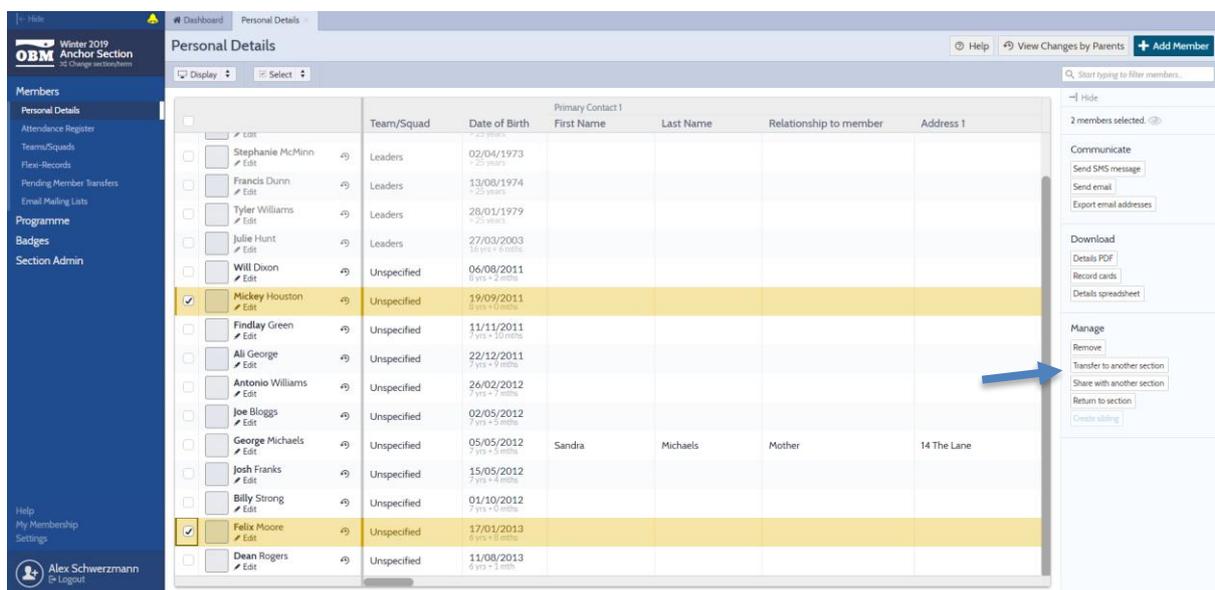
### 'Picture View':

1. Click on the record of the young person that you wish to transfer. 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 '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 tick box to the left-hand side of the young person’s record that you wish to transfer. 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 transfer.
2. On the right-hand side of the screen, select ‘Transfer’ from the list of actions.
3. See below for completing the ‘Transfer Members’ details



### 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.

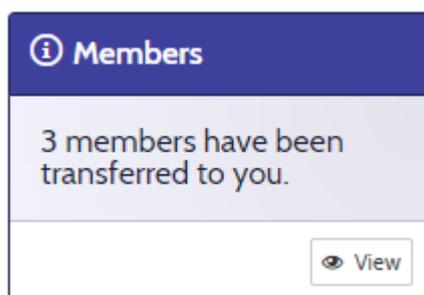
- b. If you do not have access to the youth section you are transferring the member to, use the second drop-down menu line to:
  - i. Select the type of youth section in the first drop-down (i.e. Anchor Section)
  - ii. Type the name of the Company in the second box to bring up the section (i.e. 1<sup>st</sup> 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(s).

*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 'Change section/term' menu in the top left-hand corner.
2. On the dashboard there will be an information box, informing you that a member has been transferred to the section. Click on the 'View' button in this information box



3. This will open up a 'Pending Member Transfers' tab. Select the record of the young person and then in the top right-hand corner of the tab click on 'Accept Incoming'. If for any reason you cancel the transfer then the member will remain in the original section.

OBM Winter 2019 Junior Section  
Change section/team

Members  
Programme  
Badges  
Section Admin

Help  
My Membership  
Settings

Alex Schwerzmann  
Logout

# Dashboard Pending Member Transfers

Pending Member Transfers

Cancel Transfers Accept Incoming

Display

### Incoming Members

There are 3 members being transferred to your section.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Harry Kane	Craig Short	Ethan Tangles

### Outgoing Members

There are no members currently being transferred away from your 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](mailto:support@boys-brigade.org.uk)