# Submitting Transfers in Helical

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## 1. Introduction

Helical is the new AWA database that will replace the current ILR2, I4 and Portal platforms. As we progress through the migration, we will be opening new modules for members to be able to submit data through to the MSO team.

Over the coming months we will continue to work on all modules to enable them to be as user friendly and easy to use as possible. Please note that as we update modules, we will also work to update any related factsheets to reflect these changes as soon as we can.

Within the transfer module in Helical, members will be able to submit their animal transfers directly into the database for the MSO team to approve and invoicing will be completed directly from Helical and Xero.

Members have the option to submit transfers of one or more animals to a single purchaser on the same date, or to transfer to multiple purchasers with multiple transfer dates all within the same transfer request.

For any transfers to or from a Syndicate, or to a non-member, please also send these through to the AWA MSO team. We expect this functionality to be available directly to members shortly.

Details instructions on how to complete both transfer methods can be found in this factsheet.

If you have joining data for animals being sold as PTIC, at this stage, this will need to be submitted via a Matings template. We foresee that this will be able to be submitted alongside other data in the future.

## 2. Navigating to the transfer module on the Helical database.

1. Navigate to the Helical database. A quick link can be found on the AWA website (www.wagyu.og.au) under the "AWA database" drop down menu.

2. If you are not already logged into Helical, you will need to log in. If you are unsure on how to login, or are not set-up as a user, please refer to the "Login Information" and "User and Policies information" for details instructions. If you are still having difficulty, please contact the AWA MSO team directly on (02) 8880 7700, or email office@wagyu.org.au.
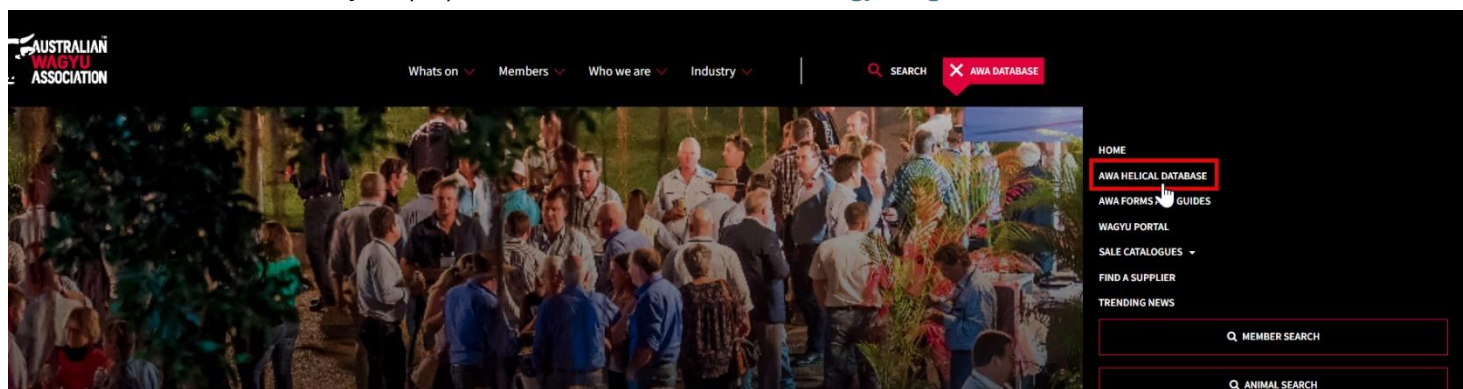


3. Select the "Transfer" tab on the side bar within Helical.
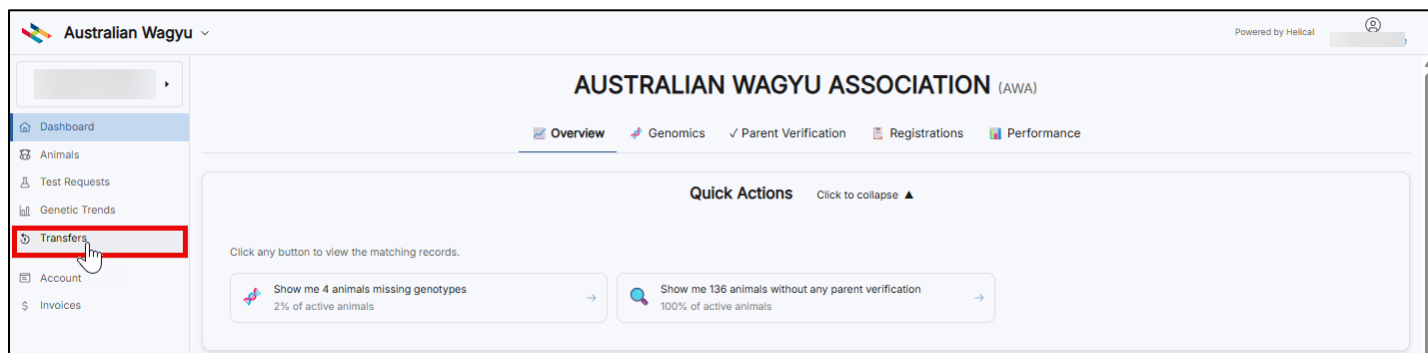
4. Select the "New Transfer" button.



5. Below is the page that will come up. From here you have the option to transfer animals to a single purchaser on a single date, or transfer animals to multiple purchasers on different dates, or a combination of purchasers and/or dates.

NOTE: At any point in this process, you can select the "Save and Exit" button to Save your transfers and come back to finish them later.
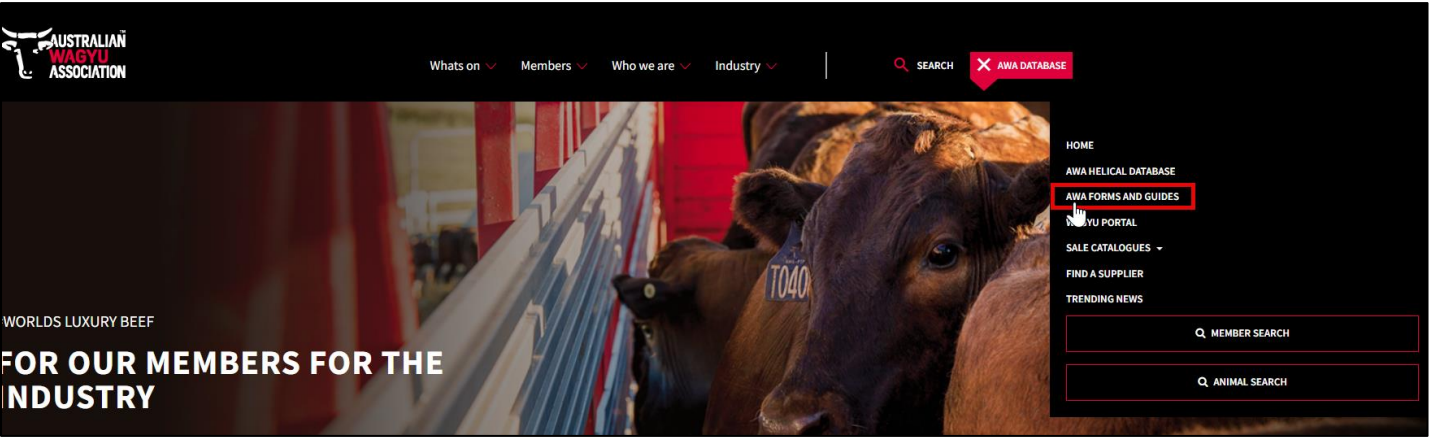If you exit this screen without selecting this button, the data you have input will not be saved.
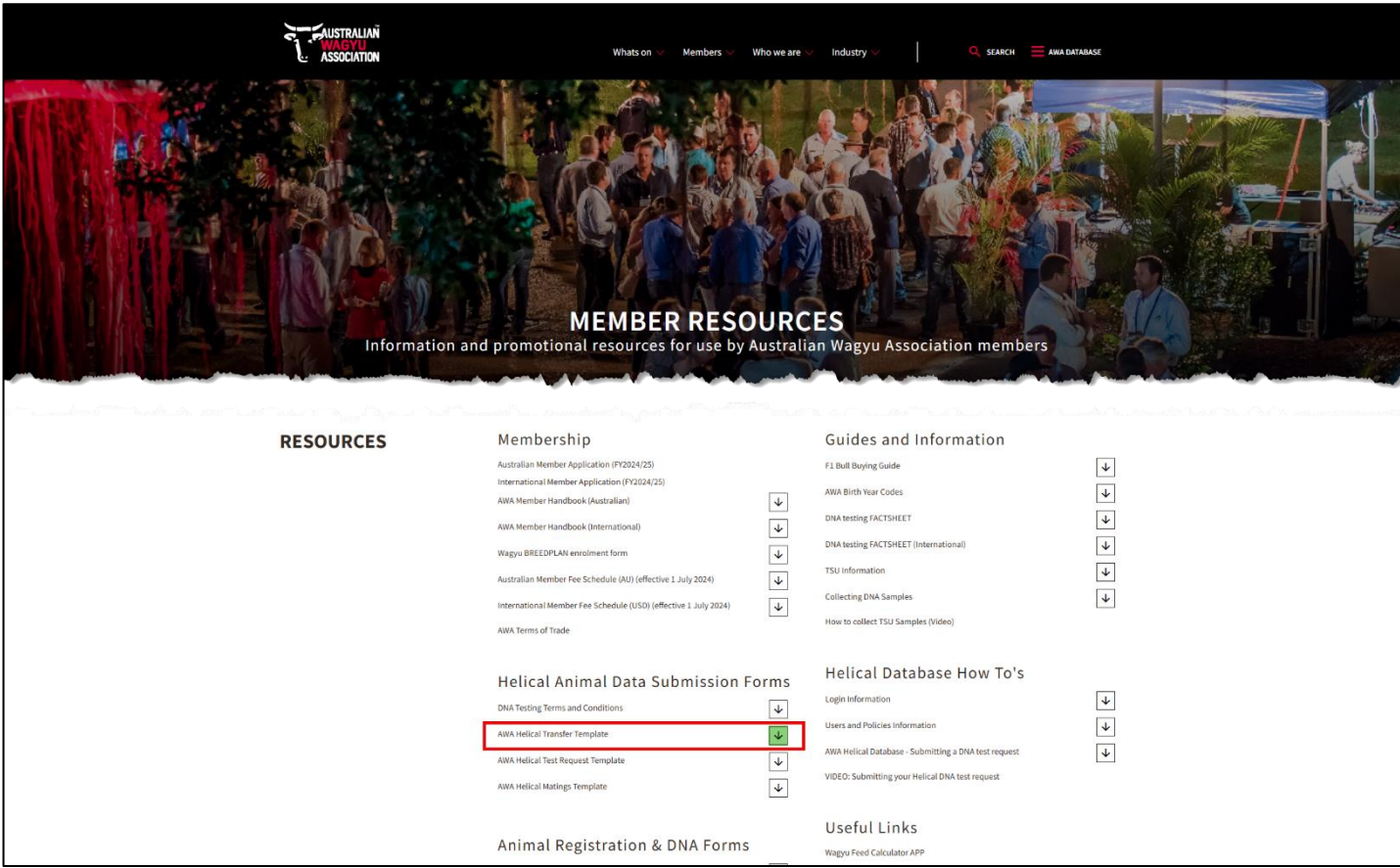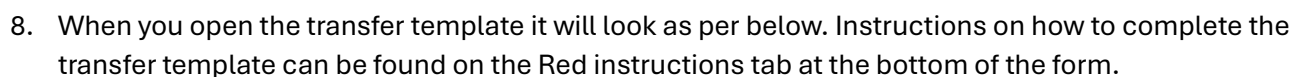
6. Helical specific transfer forms can also be found on the AWA website at the following link (Insert link), or by navigating to the AWA Database button and then selecting "AWA Forms and Guides".



7. To download the Helical transfer template, click on the arrow as highlighted green in the below screenshot.

8. When you open the transfer template it will look as per below. Instructions on how to complete the transfer template can be found on the Red instructions tab at the bottom of the form.

# 3. Transferring animals to 1 purchaser on the same date

1. Search for the purchasing members ID and select as the "Transfer To" field.
   At this stage this will only search for AWA members, however the functionality to create non-members will be released in the coming weeks.



2. Add in a Name in the "Transfer name" field.
   Note: this will automatically populate with the import type and the date (IE: Transfer 2025-06-23), however we would encourage you to add in a name that identifies this import for you so that it is easier for the MSO team to find if you need assistance, or if you need to review at a later date.

3. Select a transfer date. This can be done by typing in a date into the date field, or by selecting the calendar and selecting the date for your transfer.

4. Add your animals to be transferred. Adding in your animals to be transferred can be done by several ways, please see preferred selection methods outlined below.

   a. Select animals from within your ownership.

Click the "Select Animals" tab option at the top of the pop-up box.
To narrow down your options of animals to select from, you can add in additional filters in the filter bar, or you can search for the animal by its registered ID.



Select the animals by clicking on the tick box next to the ID – you can select multiple animals within this screen, even if you clear or change the information in the filter bar. The number selected will display next to the tick box above the animal IDs.

Once you are happy with the selection, click "Add selection".
NOTE: You can remove animals after adding them to the transfer table, or choose to add more as required even if you click "Add selection" here.

b. Copy and paste a list

Click the "Copy and Paste" tab option at the top of the pop-up box. This should be the default tab that the pop-up box opens to.

Copy your list of animal IDs from where-ever you have them recorded (IE: Excel), and paste into the box. Click "Next".



Select the "Destination column" (IE: what information is in that column of data) from the available options – for this particular transfer type, the only option to select from will be "AWA Ident".

Once you have selected the "Destination Column" you will be able to click "Add Data". This will populate the list of animals you have pasted in into the transfer information table.

5. Once you animals are loaded into the transfer table and you are happy with the provided animals, click "Next"



6. A summary of the animals to be transferred along with costs associated will display as per the below.
   If you are happy that this is correct, click "Transfer".

7. Once you click transfer, you will get a "Transfer request submitted" message and the status or the transfer request will change from "draft" to "pending".



8. If you navigate back to the "Transfer" tab on the sidebar, this transfer request should now show as pending.
Once this has been processed and invoiced by the MSO team, this will change to "Completed".

# 4. Transferring animals with multiple transfer dates and/or multiple purchasers

1. Select Advanced options to show the "Multiple transfer recipients" and "Multiple transfer dates" options.

   You can select one or both options dependant on your requirement.
   As these options are selected, additional columns will appear in the transfer information table as outlined below.

2.  Add in a Name in the "Transfer name" field.

    Note: this will automatically populate with the import type and the date (IE: Transfer 2025-06-23), however we would encourage you to add in a name that identifies this import for you so that it is easier for the MSO team to find if you need assistance, or if you need to review at a later date.



3.  Add your animals to be transferred. Adding in your animals to be transferred can be done by several ways, please see preferred selection methods outlined below.

a. Select animals from within your ownership

Click the "Select Animals" tab option at the top of the pop-up box.
To narrow down your options of animals to select from, you can add in additional filters in the filter bar, or you can search for the animal by its registered ID.

Select the animals by clicking on the tick box next to the ID – you can select multiple animals within this screen, even if you clear or change the information in the filter bar. The number selected will display next to the tick box above the animal IDs.

Once you are happy with the selection, click "Add selection".

NOTE: You can remove animals after adding them to the transfer table, or choose to add more as required even if you click "Add selection" here.

b. Copy and paste a list

Click the "Copy and Paste" tab option at the top of the pop-up box. This should be the default tab that the pop-up box opens to.

Copy your list of animal IDs from where-ever you have them recorded (This is where the Excel Helical transfer template comes in handy), and paste into the box.



If you are using the AWA Helical transfer template, you can simply select the data that you have added in, including the Header row, and paste into the above copy and past box. When you get to the next step of assigning data to columns, this should automatically be assigned based on the headers provided in the transfer template.

Select the "Destination column" (IE: what information is in that column of data) from the available options – for this particular transfer type you will need to assign a column as "AWA Ident", one as "To Entity" and one as "Date".

As mentioned above, if you are using the AWA Helical transfer template and include the header row, these columns will automatically be assigned.

Once you have selected the "Destination Column" you will be able to click "Add Data". This will populate the list of animals you have pasted in into the transfer information table.

4. Once your data is loaded, you can format dates as required. The date format for Helical should be YYYY-MM-DD.



5. When you are happy with the entered data, select "Next"

6. A summary of the animals to be transferred along with costs associated will display as per the below.
   If you are happy that this is correct, click "Transfer".



7. Once you click transfer, you will get a "Transfer request submitted" message and the status will change from "draft" to "pending"

8. If you navigate back to the "Transfer" tab on the side-bar, this transfer request should now show as pending. Once this has been processed and invoiced by the MSO team, this will change to "Completed".