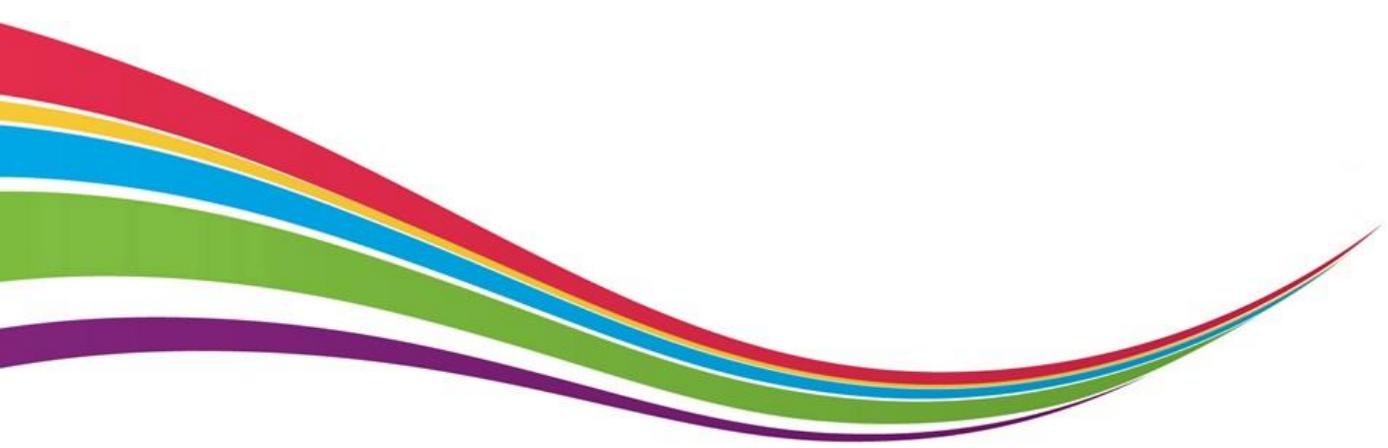


Online Record Book

Award Leader User Guide The Duke of Edinburgh's International Award Foundation

August 2023
Version: 2.16



Updates with version 2.16

The following changes are made to reflect ORB Release 2.16 (August 2023)

- Wording updated on page 32: Includes new feature Ability for Award Leader to view/download Section Summary of Participant.
- Wording updated on page 36: Gold Award validation where participants must be 16 years of age to complete Award.
- Updates on page 53: To include guidance on the new feature of participant labels at Award Level.

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Introduction to the Online Record Book (ORB)

The Online Record Book (ORB) is a secure web platform that allow participants to register for the Award, record their Award activities and submit their completed Awards. It also allows Award Leaders to monitor participants' progress and assess submitted Awards.

The user guides are for Award Leaders who are adult volunteers in the Duke of Edinburgh's International Award programme. It provides detailed, step-by-step guidance on how to use the ORB web interface.

The ORB can be accessed via the following URL: <https://www.onlinerecordbook.org>

It can also be accessed using the latest versions of the more commonly used web browsers.

It can also be accessed using the following mobile applications. The Award Leader app does not currently include all the functionality available on the web version, **you should register for your account via the website.**



With all data connected to the ORB, please take care when downloading and sharing to ensure any personal information is protected and secure. Please refer to your organisation's data protection policy/guidance to ensure all relevant, local guidelines are followed. As a minimum, information saved on a file must be password protected.

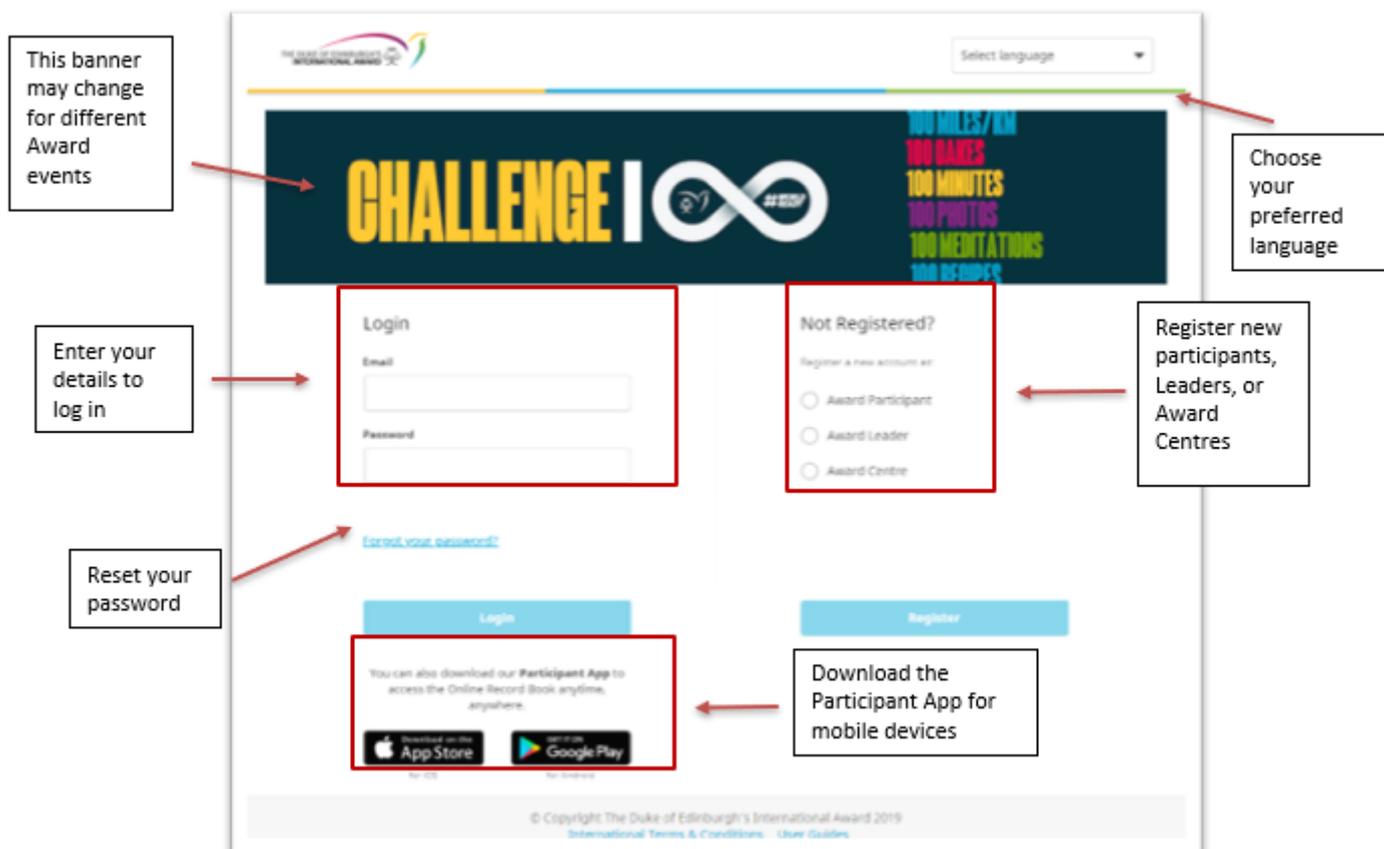
Glossary of Terms

You may find it useful to reference the [Glossary of Terms](#) for Award-specific terminology found in this document.

Getting Started

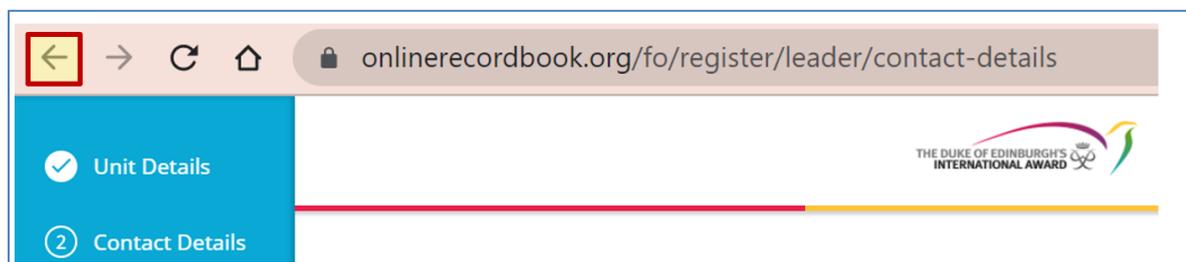
Overview Login Page

You can access the Online Record Book (ORB) at <https://www.onlinerecordbook.org/fo/>. This is the first page that you will see:



Navigating in the ORB

When using the Online Record Book, the browser's back button can be used to go back to the previous screen.

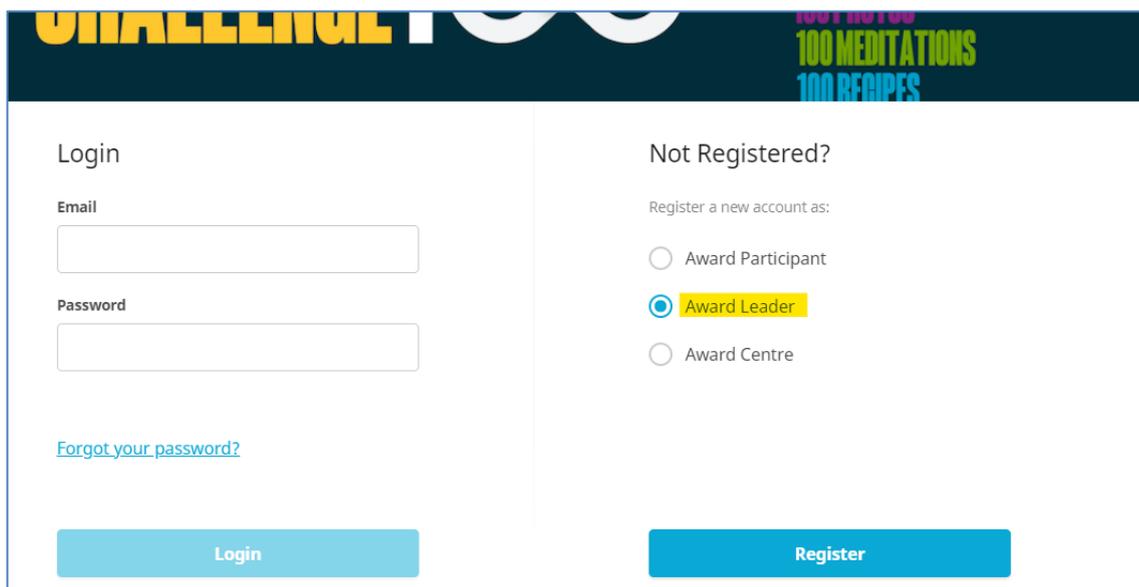


In different parts of the ORB, you will see the  icon. Click on this to find more information.

Registering as an Award Leader

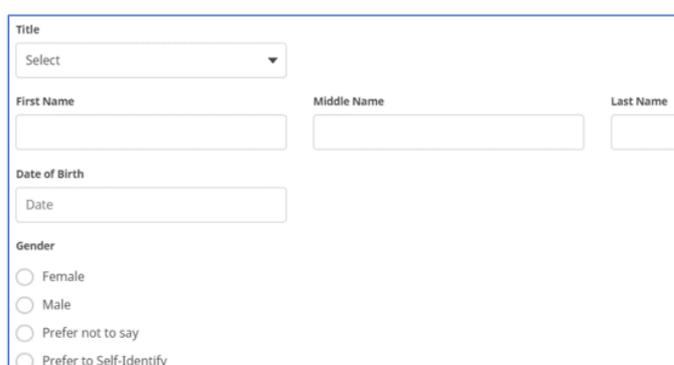
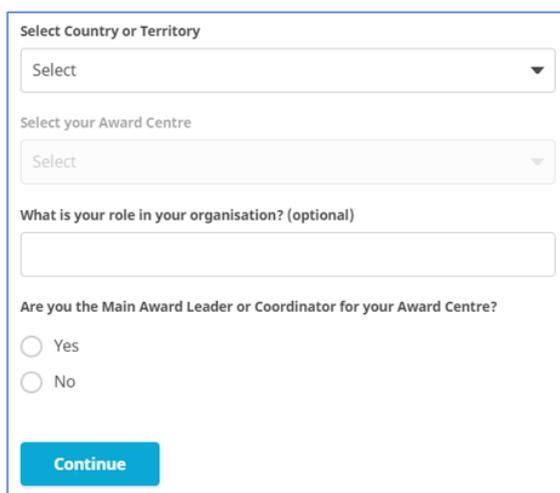
If you are setting up a new Award Centre, please use: Registering your Award Centre.

You can register as a new Award Leader on the ORB login page, available at www.onlinerecordbook.org:



Complete all fields in the registration screen. Click **Continue** to move through each part of the registration form:

- Select the country or territory of your Award Centre.
- Select your Operating Partner/Authority (*this option will only appear for those countries or territories with this structure on place*).
- Select your Award Centre name. If your Award Centre name does not appear in the list, please speak to your Award Coordinator.
- Type in your role in the organization.
- Select whether you are the Main Award Leader/Coordinator of your organisation.
- Click **Continue**.
- Fill in your personal details.



- Type in your contact details. The country code should be automatically populated, but you can change the International Dialling code by selecting the flag from the dropdown menu.

Email	Confirm email
<input type="text"/>	<input type="text"/>
Phone number	Phone type
<input type="text" value="+61"/>	<input type="text" value="Select"/>
<input type="button" value="Continue"/>	

- Insert your address details.

Address Details	
Address First Line	
<input type="text"/>	
Address Second Line(Optional)	
<input type="text"/>	
City	Zip / Post Code
<input type="text"/>	<input type="text"/>
State/Province/Region	Country / Territory
<input type="text"/>	<input type="text" value="Select"/>
<input type="button" value="Continue"/>	

- Type in your chosen password.
- Agree to the ORB Terms & Conditions.
- Your Award Office/National Award Operator may require you to agree to a code of conduct or other local requirements. If you have any questions or concerns about any of the options, please discuss with your Award Coordinator.

Email	
<input type="text" value="orb.test090322@intaward.org"/>	
Password	Repeat Password
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> I have read the Terms and conditions and agree with them. ORB Terms & Conditions	
<input type="checkbox"/> I Agree to the Volunteer Code of Conduct. For more information click here.	
<input type="checkbox"/> I confirm that I meet all NAO Regulation Requirements. For more information click here.	
<input type="checkbox"/> I have read the Privacy Policy and agree with. The Privacy Policy is here.	
<input type="button" value="Finish"/>	

Once your registration has been submitted, you will receive an email to validate your email address. The registration will be reviewed by the Award Office that holds the licence for your Award Centre.

You will receive a confirmation email once the Award Office has reviewed and approved the registration. You will then be able to login to the ORB using email address and password you entered in your registration. Login at www.onlinerecordbook.org or on the app.

Each ORB user has their own personal account and log in. It is vital that you keep your password secure and that you do not share your ORB account with anyone else. If you have any questions about this, please speak with your Award Coordinator or your Award Office.

The ORB Landing Page

Log into the ORB through www.onlinerecordbook.org, using the email address and password created during registration. Upon logging in, you will start at the ORB's landing page, which shows the To Do List:

The screenshot shows the ORB landing page with the following callouts:

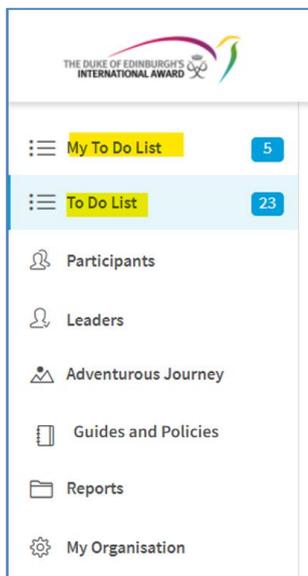
- 1. To Do List:** Points to the 'My To Do List' and 'To Do List' items in the left sidebar.
- 2. Side Menu:** Points to the entire left sidebar navigation area.
- 3. To Do tabs:** Points to the 'Registration' tab in the top navigation bar.
- 4. Filter and page search:** Points to the search and filter controls above the table.
- 5. Site-wide search:** Points to the search bar in the top right corner.
- 6. Profile menu:** Points to the user profile 'Pippa Plum' in the top right corner.
- 7. List and summary information:** Points to the table of participants.
- 8. Bulk actions dropdown:** Points to the 'Bulk action' dropdown menu above the table.

The main content area is titled 'Participant Registration' and includes the following elements:

- Navigation tabs: Registration (2), Activity Authorisation (1), Section Authorisation, Adventurous Journey, Award Authorisation, Unassigned Participants.
- Search and filter controls: Search bar, Email Confirmation (Select), Parent Authorisation (Select), Payment State (Select), Filter button.
- Summary: Number of records: 2.
- Bulk action dropdown: Select, Confirm bulk change button.
- Table with columns: ID, First Name, Last Name, Registration Date, Level, Email Confirmation, Parent Authorisation, Payment, Review, Action.
- Table data:

ID	First Name	Last Name	Registration Date	Level	Email Confirmation	Parent Authorisation	Payment	Review	Action
PN001531286	Stickybeak	Syd	26/06/2022	BRONZE	✓	Not required ✓	Exempt ⌚	Confirm	Approve
PN001367105	Grizzly	Macduff	19/04/2022	BRONZE	⌚	Electronically ⌚	Not paid ⌚	Confirm	Approve
- Footer: 20 per page, Export Table button.

1. To Do List

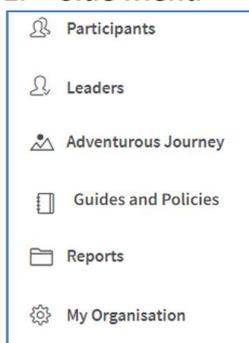


In the left-hand side panel, there is a menu of options. At the top are the **To Do Lists**. Depending on local settings, you will see either one or two 'To Do' lists.

To Do List takes you to the list of all tasks for the Award Centre.

My To Do List takes you to the list of tasks connected to the participants for whom you are Award Leader. Depending on local settings, you may only be able to see **My To Do List**.

2. Side Menu



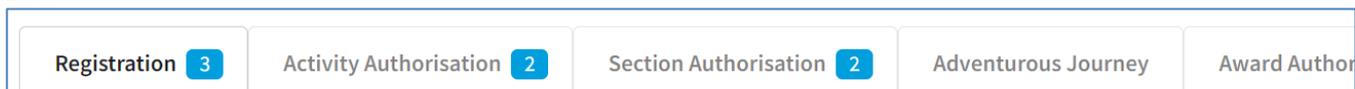
Beneath the To Do Lists are a range of further menu items:

- Participants
- Leaders
- Adventurous Journey
- Guides and Policies
- Reports
- My Organisation

You will find more information on these in later sections of this guide.

3. To Do tabs

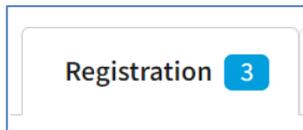
Running across the page is a set of tabs showing the different category of actions available within the To Do List.



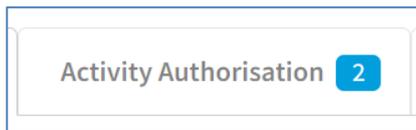
7

Throughout the To Do List, blue squares identify the number of tasks waiting for action.

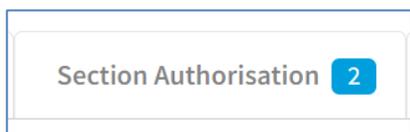
From your **To Do List** you can manage different Award sections and activities such as:



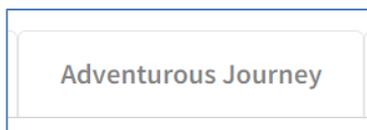
Review and approve new registrations.



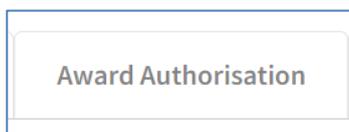
Review and approve/ask for revision of any new activity request.



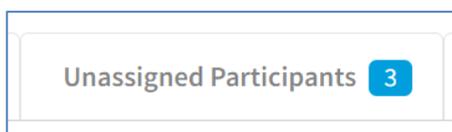
Review and approve/ask for revision of requests for Section Authorisation.



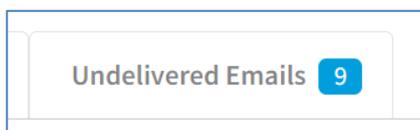
Review and approve/ask for revision of portions of the Adventurous Journey.



Review and approve/ask for revision of any requests for Award Authorisation.

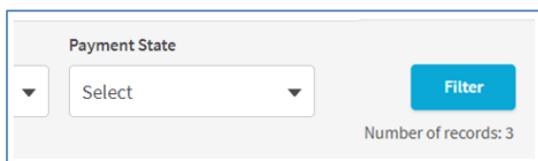


Accept new participants who have not yet been assigned to an Award Leader.



Depending on your settings locally, you may also have a tab to identify emails from the ORB that have not been delivered successfully.

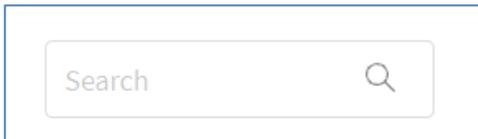
4. Filter and page search



Below the set of tabs are search and filter functions.

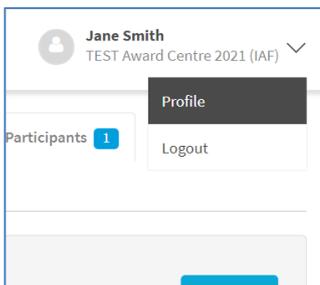
The search function searches for those participants whose names appear in the tab. If you apply filters to the list, the search will limit the results based on the filters.

5. Site-wide search



The search bar in the top right-hand corner enables a 'universal' search: you can search across the participants and Award Leaders that you have permission to view in your Award Centre. **Note:** At least three characters are needed to run a search.

6. Profile menu



The far top right-hand corner includes a dropdown menu with options to go to your profile page or logout of the ORB. On the profile page, you can update personal details and change your password. Remember to always log out of the ORB when you are finished using it.

7. List and summary information

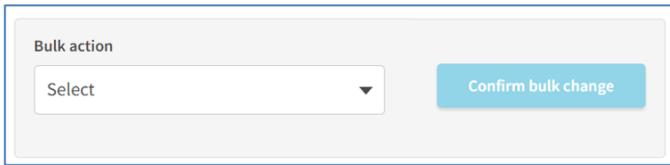
The main body of the page includes the list and summary information for participants. Each of the columns featuring an inverted triangle icon in the column header can be sorted in ascending or descending order.

ID	First Name	Last Name	Registration Date	Level
----	------------	-----------	-------------------	-------

Most pages will have an 'Export Table' button at the bottom right that enables you to download the data you see into Excel for further use or analysis.

With all data connected to the ORB, please take care when downloading and sharing to ensure any personal information is protected and secure. Please refer to your organisation's data protection policy/guidance to ensure all relevant, local guidelines are followed. As a minimum, information saved on a file must be password protected.

8. Bulk actions dropdown



The image shows a user interface element for bulk actions. It consists of a light gray rectangular container. Inside the container, on the left, is a dropdown menu with the text "Bulk action" above it and "Select" as the current selection. To the right of the dropdown menu is a teal-colored button with the text "Confirm bulk change".

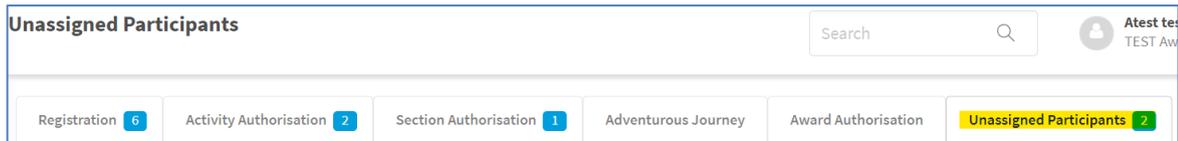
On both the To Do List and Participants pages you will find the option to complete bulk actions. More information about these actions can be found in the [Bulk actions](#) section of this guide.

Participant Registration - Unassigned Participants

Before registration approval, participants need to be assigned to an Award Leader.

Depending on local settings by your Award Office, during registration, a participant can have the option to add their Award Leaders email address. If it is not added or if this feature is not available, their registration will be found in the **Unassigned Participants** tab.

1. From the To-Do List, select Unassigned Participants tab

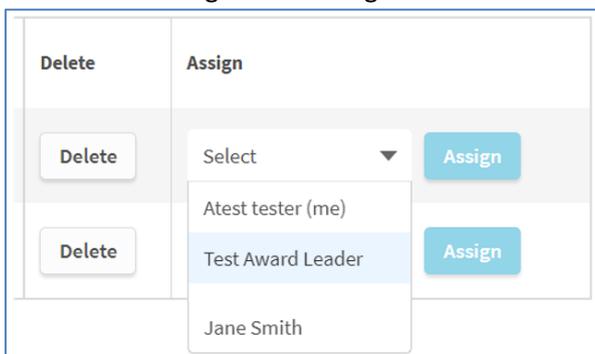


2. Review the participants waiting to be assigned.

The screenshot shows a table of participants with columns for ID, First Name, Last Name, Registration, Level, Email, Delete, and Assign. Two participants are listed: 'Duplicate' and 'Fred Flintstone'. Each row has a 'Delete' button and an 'Assign' button. A 'Bulk action' dropdown is set to 'Jane Smith' and a 'Bulk change' button is present.

ID	First Name	Last Name	Registration	Level	Email	Delete	Assign
PN001316552	Duplicate	Test	20/10/2021	BRONZE	ORB.Test2.201021@intaward.org	Delete	Select Assign
PN001316549	Fred	Flintstone	20/10/2021	BRONZE	Orb.Test201021@intaward.org	Delete	Select Assign

3. From the Assign drop down menus, select an Award Leader from the list.
4. Click Assign and the registration will be moved to the 'Registrations' tab for review.



5. If you do not recognise the registration, or if it is not valid, you can delete it by Clicking the Delete button.

Delete button: Depending on local settings by your Award Office, you may not be able to delete a registration that has been paid. Before deleting, please consult with you Award Coordinator.

Once deleted, you will not be able to recover the record.

Delete	Assign
Delete	Select <input type="button" value="Assign"/>
	Warning: Name and DoB same as: PN000201292

There is also the option to assign participants using a bulk action. This is useful if you have several registrations in the Unassigned Participants tab.

In the **Bulk action** drop down, select the Award Leader, and confirm with the **Bulk change** button.

Bulk action
Select <input type="button" value="Assign"/>
Atest tester (me)
Test Award Leader
Jane Smith
<input type="checkbox"/> PN001316549 Fred

3 items selected	<input type="button" value="Clear"/>	<input type="button" value="Confirm bulk change"/>
------------------	--------------------------------------	--

Potential duplicate registrations can also be found at this stage. Any registrations which have the same name and date of birth as other participants in your Award Centre (likely a duplicate) will be indicated with a red text warning. Participants should only have one ORB account through which they can manage all of their Award levels.

<input type="checkbox"/>	ID	First Name	Last Name	Registration	Level	Email	Delete	Assign
<input type="checkbox"/>	PN001316591	Tessa	Testerson	20/10/2021	SILVER	orb.test4.201021@intaward.org	<input type="button" value="Delete"/>	Select <input type="button" value="Assign"/> Warning: Name and DoB same as: PN000201292

Depending on local settings by your Award Office, you may be able to **Delete** duplicate registrations.

Name	Registration	Level	Email	Delete	Assign
	20/10/2021	BRONZE	ORB.Test2.201021@intaward.org	<input type="button" value="Delete"/>	Select <input type="button" value="Assign"/>

Participant Registration - Review and Approve New Registrations

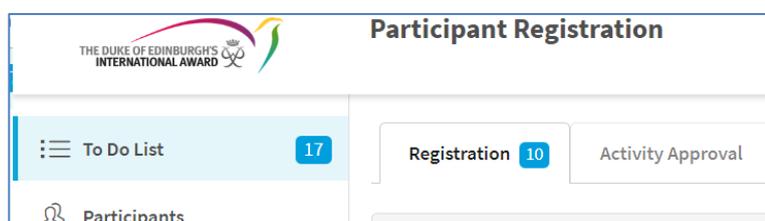
To be able to approve new registrations via the Online Record Book, participants need to have:

- Confirmed their email address.
- Received parental/guardian approval (if required).
- Be marked as paid **OR** confirmed that the payment will be made later or that it is not required.

Note: Payment options differ depending on your Award Operator. Please contact your Award Coordinator or Award Office if you are unsure about the payment options for your Award Centre.

To review and approve new registrations:

1. From the To-Do List select the **Registration** tab.



2. Review the details displayed:



will be displayed, if the action hasn't been completed (e.g. payment not received).



will be displayed when the action is complete (e.g. email address has been confirmed).

First Name	Last Name	Registration Date	Level	Email Confirmation	Parent Approval	Payment
Sarah	(Participant)	04/12/2018	BRONZE	✓	Not required ✓	Later ⌚
John	PaperConsent2Electronic	07/11/2018	BRONZE	✓	Electronically ⌚	Later ✓
Test	Link	10/10/2018	BRONZE	✓	Not required ✓	Not paid ⌚
Sam	(Participant)	10/10/2018	GOLD	⌚	Not required ✓	Later ✓

3. Click **Confirm** and a pop-up box will appear

Email Confirmation	Parent Approval	Payment	Review	Action
✓	Not required ✓	Later ⌚	Confirm	Approve
✓	Electronically ⌚	Later ✓	Confirm	Approve
✓	Not required ✓	Not paid ⌚	Confirm	Approve

4. The confirmation box includes several registration details

The screenshot shows a registration confirmation form for a participant named Peter Orrey. The form is titled "#1265241 - Peter OrreyTest080921" and includes the email address "peter.orrey080921@intaward.org".

Key sections of the form are highlighted with red dashed boxes and labeled with callouts:

- a. Award Start Date:** A text input field containing "08/09/2021".
- b. Payment Information:** A section containing a "Payment" dropdown menu (set to "Not paid"), a "Payment Date" input field (set to "Date"), an "Override payment note" text area, and a "Transaction ID" input field with a "Confirmed" checkbox.
- c. Parental consent:** A section containing a "Printable Parental Consent Form" dropdown menu (set to "Electronically") and a "Confirmed" checkbox.
- d. Confirmation of email and surveys:** A section containing two checkboxes: "Email Confirmed" (unchecked) and "Participant to receive invitations to the Foundation's Research Surveys." (checked).

At the bottom of the form, there are three buttons: "Close", "Delete Registration", and "Save".

a. **Award Start Date** is set as the registration date by default. **NOTE:** Participants are not able to save activity logs set before their Award Start Date.

b. **Payment:** Payment types and processes can vary between Award Operators, please discuss with your Award Coordinator or your Award Office to confirm which types of payment (if any) that are available to your participants.

Please note:

- Payment types can vary depending on your local settings.
- Where online payment methods are in place, the payment information will be automatically completed.
- Where it is an option, and where no payment is required, Exempt can be selected.

The payment note should only be added where there has been a complication or change in payment method that may need explaining later. The transaction ID is usually either completed automatically, or by your Award Office, or it is left blank. If it has not automatically been done, the tick box should be selected once the required payment information is complete.

c. **Parental Consent:** If consent has been delivered via email and has been confirmed by a parent or guardian, the box will be automatically ticked. If your Award Centre uses a paper consent form, or if consent has been confirmed by another method, please select accordingly from the dropdown menu. Please contact your Award Coordinator to confirm the consent options available at your Award Centre.

d. **Confirmation of email and surveys:** In most circumstances, you should not tick the email confirmed box for a participant. This is because it is important that you make sure that the participant confirmed their email from the automatic email that was sent to them when they registered. Once they confirm their email, the box will appear as ticked. In case the email is incorrect, you can correct the email and resend from the participant's ORB **Detail** page, **Overview** section (on the right-hand side).

bronze test1 (PN001234755)
Participants / Detail

Search

Attest tester
TEST Award Centre 2021 (IAF)

Detail Bronze Level History Log

Title
Select

First Name
bronze

Middle Name

Last Name

Overview

Age 15 Organisation TEST Award Centre 2021 (IAF) Registration Date 06/07/2021

Level BRONZE SILVER GOLD

Allow adding logs after 25 years of a

Account Settings

Change Participant's Status
Send confirmation email again
Recover Password
Next level invitation
Delete Contact

It is recommended that you review the full participant profile before approving the registration. By clicking on the participant ID, the full profile will be displayed, and the Award Leader will be able to modify/amend the information as required.

ID	First Name	Last Name	Registration Date
PN001234755	bronze	test1	08/07/2021

5. Once all the registration checks have been confirmed, click **Approve** to finish the registration approval.

Email Confirmation	Parent Approval	Payment	Review	Action
✓	Not required ✓	Later ✓	Confirm	Approve

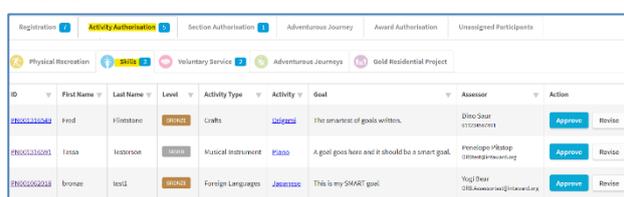
Important note about clicking Approve: Once you have clicked **Approve**, the participant is registered for their Award. Please only **Approve** if you are sure that the participant is going to undertake the Award. Depending on local settings by your Award Office, it may not be possible for them to have a refund if they change their mind after being approved. Please discuss this with your Award Coordinator/Award Office if you are unsure.

6. Once approved, the participant will be notified immediately by email.

New Activities - Reviewing and Approving/Asking for Revision

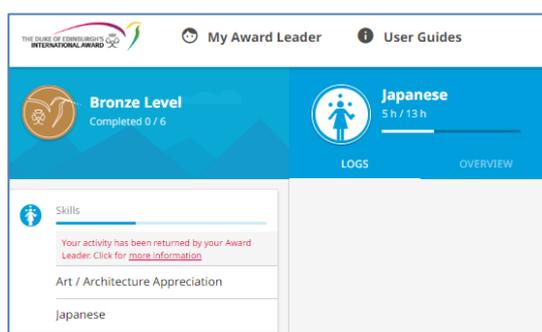
Before logging hours for their Award, participants must set up their activities in the Online Record Book and send them to their Award Leader for approval. Award Leaders can review the goal of the activity and the Assessor information. The Award Leader can approve the activity or ask the participant to revise it. The participant will receive a notification with the outcome. **Depending on settings made by the Award Office, participants may not be able to edit a goal or assessor once approved (though the Award Leader will be able to do this).**

1. From the **To-Do List** option on the left-hand side, select the **Activity Authorisation** tab.
2. Look for the blue numbers indicating that you have activities waiting for approval. Click the tabs to view these activities. Click the ID number to see all of the details about a participant's Award. Note: It is advisable to view a participant's entire Award to ensure that they have created a balance selection of activities across all of the sections.



ID	First Name	Last Name	Level	Activity Type	Activity	Goal	Assessor	Action
PH00011046	Fred	Hiltano	Bronze	Crafts	Origami	The smallest of goals written.	Dino Dear dino@orb.com	Approve Revise
PH00011005	Tessa	Isidoroo	Bronze	Musical Instrument	Flauto	A goal goes here and it should be a smart goal.	Penelope-Phleg penelope@orb.com	Approve Revise
PH00002018	tessa1	tessa1	Bronze	Foreign Languages	Japanese	This is my SMART goal.	Yogi Dear yogi@orb.com	Approve Revise

3. **Asking for Revision of Activities:** Clicking the white **Revise** button will prompt a dialogue box. The activity will be returned to the participant with any comments the Award Leader makes when asking for revision. The participant will also receive a notification on their ORB. (Shown in red type in the activity section.)

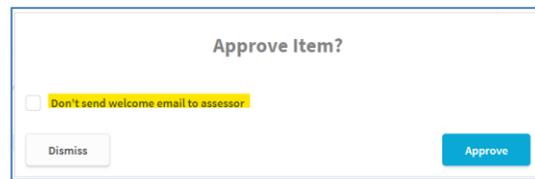


The participant may resubmit the activity for approval at any time. Encourage your participants to click the [more information](#) option to ensure that they have made the required revisions.

When the participant has made all the changes, they will resubmit the activity for approval. You will repeat all the steps above. If the required changes have not been made, click **Revise** and send back to the participant with a message again.

Depending on local settings by your Award Office, approving an activity may prompt a welcome email to be sent to the Assessor. This feature is enabled by your Award Operator. If it is enabled, you will see the option to tick 'Don't send welcome email to Assessor.' Click this when you are sure the Assessor does not need to receive the welcome email. For example, they may already be an Assessor to other participants and understand the role of Assessor.

If this tick box does not appear, it means that this function is disabled by your Operator.



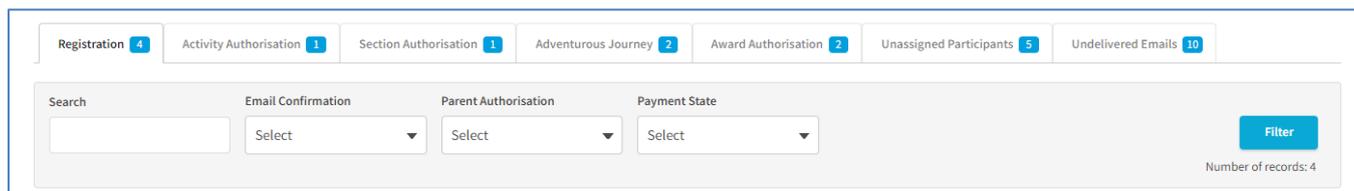
The image shows a dialog box titled "Approve Item?". Inside the dialog, there is a checkbox with the label "Don't send welcome email to assessor". The checkbox is currently unchecked. Below the checkbox, there are two buttons: "Dismiss" on the left and "Approve" on the right. The "Approve" button is highlighted in blue.

Note: Adventurous Journeys created by participants also need to be approved before their start.

Section Authorisation - Reviewing and Approving/Asking for Revision

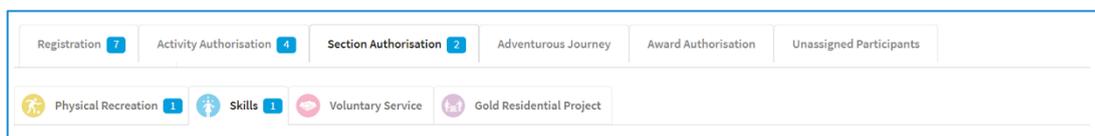
This works in much the same way as this initial activity request. Once a participant has completed a section of their Award and the Assessor has approved (by sending their report), the section is ready for Award Leader sign-off. For Section Authorisation, you will notice that the Adventurous Journey appears in its own separate tab, rather than with other sections of the Award. This is because there are three separate sections of the Adventurous Journey that may be completed at different times.

1. From the **My To-Do List** option on the left-hand side, select the **Section Authorisation** tab.



The screenshot shows a navigation bar with tabs: Registration (4), Activity Authorisation (1), Section Authorisation (1), Adventurous Journey (2), Award Authorisation (2), Unassigned Participants (5), and Undelivered Emails (10). Below the tabs is a search bar and three dropdown menus for 'Email Confirmation', 'Parent Authorisation', and 'Payment State', each with a 'Select' option. A 'Filter' button is on the right, and 'Number of records: 4' is displayed at the bottom right.

- 2.



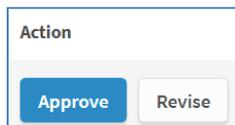
The screenshot shows the 'Section Authorisation' tab selected. Below the tabs, there are icons and labels for 'Physical Recreation (1)', 'Skills (1)', 'Voluntary Service', and 'Gold Residential Project'.

Click the section tabs displayed to find the sections waiting for authorisation.

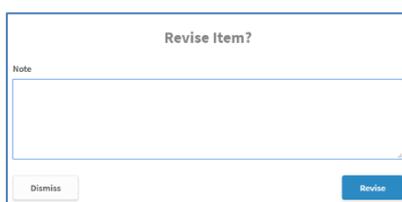
3. Click [View](#) to see Logs, the Assessor's report, and Notes for the Award Leader.
4. Once you have reviewed the activity, its logs, and the Assessor's report, click **Approve** or **Revise**, as appropriate.

Clicking the **Revise** button will prompt a dialogue box for your comments for revision.

Level	Finished	Logs	Assessor approval	Note for Award Leader
BRONZE	06/12/2018	View	View ✓	View



An 'Action' box containing two buttons: 'Approve' and 'Revise'.



A 'Revise Item?' dialog box with a 'Note' text area, a 'Dismiss' button, and a 'Revise' button.

The section will not be approved, and any comments made in the pop-up box when asking for revision will be sent to the participant. The participant will also receive a notification.

Viewing and Editing Participant Details

On the Online Record Book, Award Leaders can manage either all participants registered to their Award Centre or participants assigned to them personally as an Award Leader, depending on the configuration set by their Operator.

1. **Browsing participant details**

- Select **Participants** from the menu on the left-hand side.
- Select **My Participants** to view the list of your participants.
- If it is available to you from your Operator, **All Participants** shows the list of all participants registered to your Award Centre.

2. Viewing a participant's profile

- Select the participant by clicking on their **ID** number in the left-hand column.

	ID	First Name
<input type="checkbox"/>	PN001316591	Tessa

- Select the **Detail** tab to view the participant's personal details.

Tessa Testerson (PN001316591) Participants / Detail Search Jane Smith TEST Award Centre 2021 (IAP)

Detail Silver Level History Log

Overview Account Settings

Age: 16 Organisation: TEST Award Centre 2021 (IAP) Registration Date: 20/10/2021 State: Current

Level: Refresh Update Save

Level summary

Title: Select

First Name: Tessa Middle Name: Last Name: Testerson

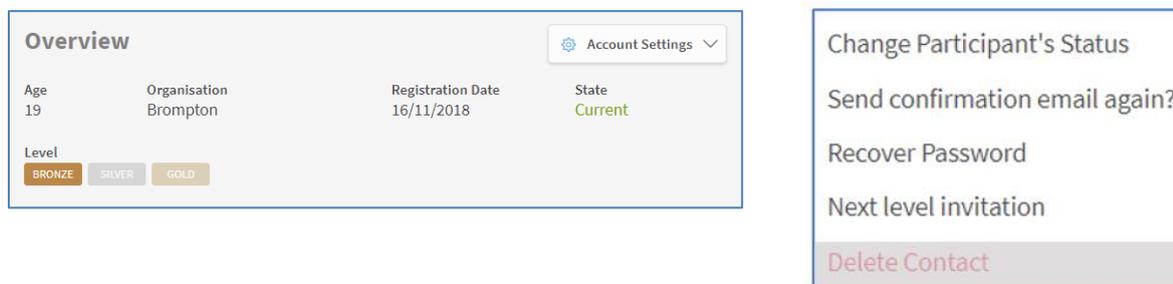
- The participant's **History Log** shows a summary of actions taken by or on behalf of the participant, including requests for assessment and Authorisation.

Detail Silver Level History Log		
UTC Time	Local Time	Description
20/10/2021 17:47	20/10/2021 17:47	Administrator "Peter Orrey" has logged in as "Tessa Testerson"
20/10/2021 16:22	20/10/2021 17:22	Atest tester changed the start date of the award of Tessa Testerson from 20/10/2021 to 20/10/2021.
20/10/2021 16:22	20/10/2021 17:22	Atest tester changed the start date of the award of Tessa Testerson from 20/10/2021 to 20/10/2021.

- There is also a history log for each Award level (found at the bottom of each Award tab).

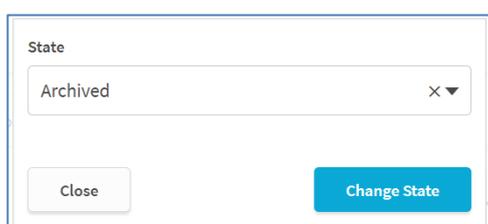
3. Edit your participant's account settings, including archiving

Once you have navigated to the **Detail** tab in the participant's profile, choose the **Account Settings** menu in the top right corner to make modifications.



a. Change the status of a participant (archiving)

As an Award Leader you can mark a participant's account as either **Current** or **Archived**. Archived (sometimes known as Inactive) can be used when you know the participant is no longer undertaking their Award. To make a change, choose the **State** and then click [Change State](#). To navigate away from this option, click **Close**.



Archiving considerations:

- Archived should be used rather than Delete Contact as it means the record of the participant's progress will remain, should they want to continue (which they are able to do up to their 25th birthday). In these cases, simply change their status back to Current. An archived participant will not be able to add anything to their Award without connecting with their Award Leader.
- If an participant has left your Award Centre, they should remain archived in case they wish to take up their Award with another Award Centre.
- You can use the bulk actions function to archive numbers of participants (see bulk actions guidance for more information).

b. Send confirmation email again

This function allows you to resend the automatically generated email to the participant which enables them to confirm their email address is correct.

c. Recover password

If a participant forgets their password or is locked out of their ORB account, selecting this option sends an automatically generated email to the participant's email address, enabling them to reset their password. Neither the Award Leader nor the Award Office can change a participant's password manually.

d. Next level invitation

Where a participant has completed an Award level (or is about to complete their Award level), clicking on **Next level invitation** sends an email to the participant to enable them to register for the next level of Award. Note: the participant will not be able to complete the next level

registration if they do not meet the Award requirements. Refer to your Award Leader Handbook/Award Office for details about when the **Next level invitation** should be used.

e. Delete contact

Note: This option may be disabled by your Award Operator

Deleting a contact should not be used instead of **Change Participant's Status**. It should only be used where a participant has a duplicate account or if the account created is related to testing the ORB. Contact your Award Office for details about deleting contacts.

4. Level summary

The level summary on a participant’s detail page gives you a quick and easy view of their latest/current Award level progress.

Level summary			
BRONZE	Completed / Required	Last Activity	
Physical Recreation	28 h / 26 h	7 days ago	Signed Off
Skills	13 h / 13 h	7 days ago	Signed Off
Voluntary Service	13 h / 13 h	3 months ago	Signed Off
Practice Journey	-	7 days ago	Assessment Requested
Qualifying Journey	-	7 days ago	Assessment Requested

5. Editing information in the Details tab

Once you have navigated to a participant’s Award, you can edit details by clicking in any of the available fields, editing the information and saving your changes. Any changes you make will be reflected on the participant’s view of their Award.

Please contact your Award Coordinator or Award Office before making any changes to the **Award Payment** section. These settings are specific to each Award Operator.

6. Change of Award Leader

To change a participant’s Award Leader to another Leader within your Award Centre:

- a. Look for the **Leader** section on the left-hand-side of the record and click **Change**.

Overview Award Settings ▾

Award State: Awaiting Organisation Approval
Award Leader Sign-off date: 17/12/2018

Leader Change

Name: [Redacted] (AwardLeader)
Email: [Redacted]_Leader@Test-Email.co.uk
Phone Number: +441234567890

- b. From the pop-up list, select the participant’s new Award Leader from the list and Click **Change** to save.

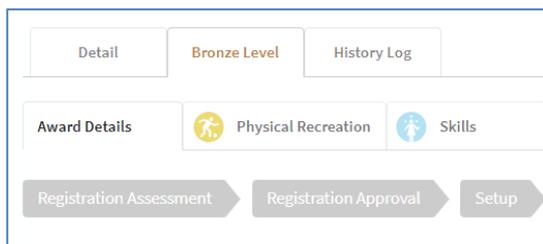
ID	First Name	Last Name	Email
581	New Award Leader	Leader	testaward00+ys@gmail.com

Note: If the new Award Leader does not appear on the pop-up list, please contact your Award Coordinator or Award Office for assistance.

Award Payment

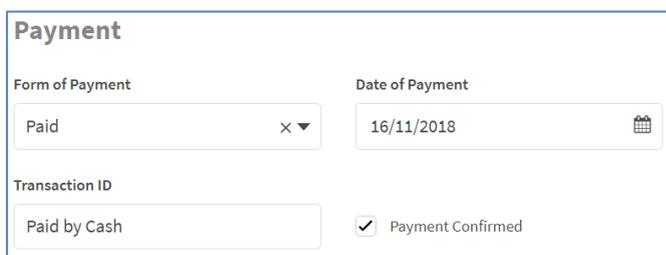
Note: Award payments are handled differently by our different Operators around the world. Please contact your Award Coordinator or Award Office for details about how payment works at your Award Centre.

In all cases, payment is specific to each level of the Award that a participant registers for. You will find the payment details on the **Award Level** tab within a participant record.



The screenshot shows a user interface for an Award Level tab. At the top, there are three tabs: 'Detail', 'Bronze Level' (which is selected and highlighted in orange), and 'History Log'. Below the tabs, there are two main sections. The first section is 'Award Details', which includes two sub-sections: 'Physical Recreation' (with a person icon) and 'Skills' (with a person icon). The second section is a horizontal flow of three steps: 'Registration Assessment', 'Registration Approval', and 'Setup', each represented by a grey arrow pointing to the right.

If permitted by your Award Office, payment for a participant's Award registration may be confirmed after they have registered. In this case, to change an Award payment status, navigate to the participant's profile page and insert the status and date of the payment, confirm the payment, and click **Save** after you have made changes.



The screenshot shows a 'Payment' form. It has a title 'Payment' in bold. Below the title, there are four fields. The first field is 'Form of Payment' with a dropdown menu showing 'Paid' and a close button (X). The second field is 'Date of Payment' with a text input showing '16/11/2018' and a calendar icon. The third field is 'Transaction ID' with a text input showing 'Paid by Cash'. The fourth field is a checkbox labeled 'Payment Confirmed', which is checked.

Note: If payment is made through a Payment Gateway (such as PayPal), you won't be able to edit this.

Once again, please check with your Award Coordinator or Award Office for details about how payment works at your Award Centre.

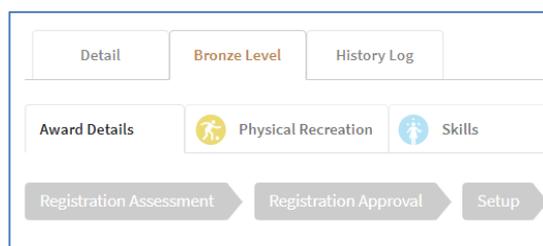
Managing an Award in Progress

Once a participant has started their Award activities, the Award Leader's role is to mentor them through their Award with advice and encouragement. Using the ORB, an Award Leader can see all the activity on a participant's Award and better plan mentoring conversations with the participant.

Browsing a participant's Award

To view a participant's Award:

1. Navigate to the participant's record.
2. Select their Award Level tab to view the list of the sections available.



3. Switch between tabs to see specific information about the sections such as:

- Award progress
- Progress of the sections (status)
- Activity setup
- Assessor details
- Logs
- Documents

A screenshot of the full Award page interface. At the top, there are three tabs: 'Detail', 'Bronze Level' (highlighted), and 'History Log'. Below the tabs is a row of section icons: 'Award Details', 'Physical Recreation', 'Skills', 'Service', 'Adventurous Journey', and 'Documents'. Underneath, there are two sub-sections: 'Jujitsu' and 'Cricket'. A progress bar shows several stages: 'Setup', 'Approval', 'In Progress', 'Assessor Approval', 'Award Leader Sign-off' (highlighted), 'Award Office Sign-off', 'Completed', 'Ceremony', 'Inactive', and 'Deleted'. Below the progress bar is a section titled 'Assessor Details' with a table containing columns for Title, Name, Email, Phone, and State. The table shows: Title: Mr, Name: G Judo, Email: g.judo@gmail.com, Phone: ---, State: ---. Below the table are two columns: 'Assessor approve' with a green checkmark and 'Assessor report' with a 'View' link. At the bottom, there are two sections: 'Activity Detail' with a dropdown menu showing 'Martial Arts / Self Defence' and 'Activity' with a table showing a log entry for '26/05/2018 1 hour 0 minutes' with a value of '11'.

Making Changes to an Award on Behalf of a Participant

An Award Leader can make changes to a participant's Award on their behalf. Sometimes this is necessary if the participant does not have access to the Internet or is otherwise unable to use the ORB.

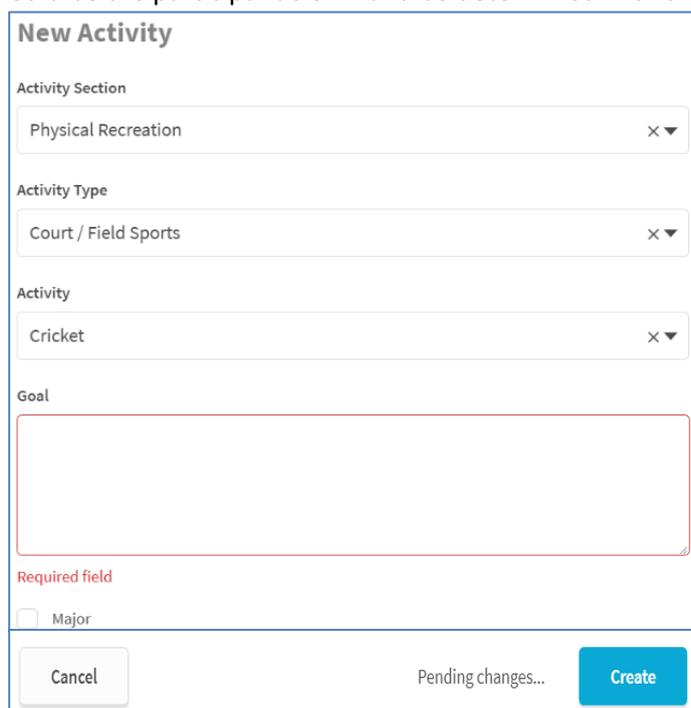
Note: Any changes made will be reflected within the participant's account and appear as their own.

1. Setting up activities and multiple activities on behalf of a participant

To set up an activity on behalf of a participant:

1. Navigate to the participant's account and Award level.
2. Select the appropriate Section and click **Add Activity** (note that this cannot be done for the Adventurous Journey).
3. Select an activity from the dropdown list.
4. Complete the required details.
5. Click **Create** at the bottom of the page to save the new activity.
6. You can click **Cancel** if you do not wish to save your work.

Note: The goal should be the participant's own and be determined with their Assessor.



The screenshot shows a form titled "New Activity" with the following fields and options:

- Activity Section:** A dropdown menu with "Physical Recreation" selected.
- Activity Type:** A dropdown menu with "Court / Field Sports" selected.
- Activity:** A dropdown menu with "Cricket" selected.
- Goal:** A large empty text area with a red border and a "Required field" label below it.
- Major:** A checkbox that is currently unchecked.
- Buttons:** "Cancel" (grey), "Pending changes..." (text), and "Create" (blue).

2. Adding logs on behalf of a participant

Depending on local settings, participants logs must be made within four weeks of the activity taking place. The Award Leader is still able to add logs on behalf of a participant. To do this:

1. Navigate to your participant's account, their Award level, the activity section and the activity.
2. Click the option **Add Log** displayed underneath the list of logs already in the system.
3. Insert the details required: Date, Duration, Description.
4. Click **Save** to add your log.

Note: You cannot add pictures to a log as the Award Leader, only the participant can do this.

Add Log

Date

Duration

Description

3. Editing or deleting logs on behalf of a participant

To edit a log:

1. Click the log you would like to edit.
2. Edit the Date, Duration or Description displayed, as necessary.
3. Click **Save** to confirm your changes.

Edit Log

Date

Duration

Description

To delete a log:

1. Click the log you would like to delete.
2. Click **Delete**.

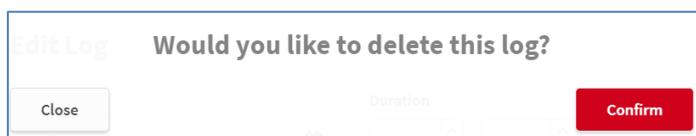
Edit Log

Date

Duration

Description

3. A pop-up will appear to confirm your choice to delete. Select **Confirm** to delete or **Close** to cancel. You will not be able to recover any deleted logs.

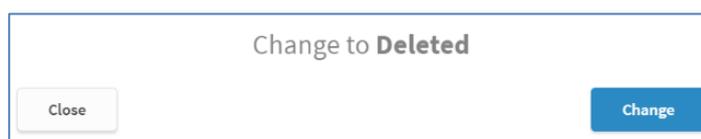


4. Deleting or restoring activities on behalf of a participant

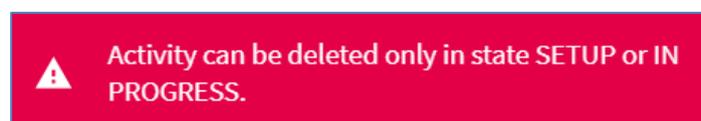
As an Award Leader, you can delete or restore activities on a participant record. You will only be able to delete an activity if multiple activities have been set up in a section. If a participant needs to change their activity, they must set up the new activity first.

To delete an activity:

1. Navigate to the participant's Award Section.
2. From the Section tab, select the activity you would like to delete.
3. From the flow bar, click **Deleted**.
4. Click **Change** to confirm your choice.
5. The activity will be removed from the participant's ORB profile.

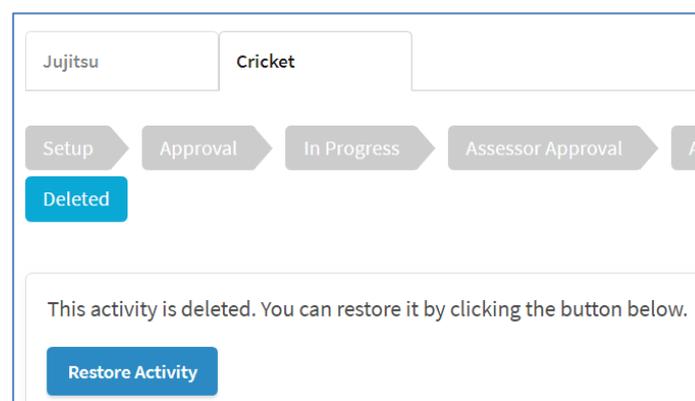


Note:



To restore a deleted activity:

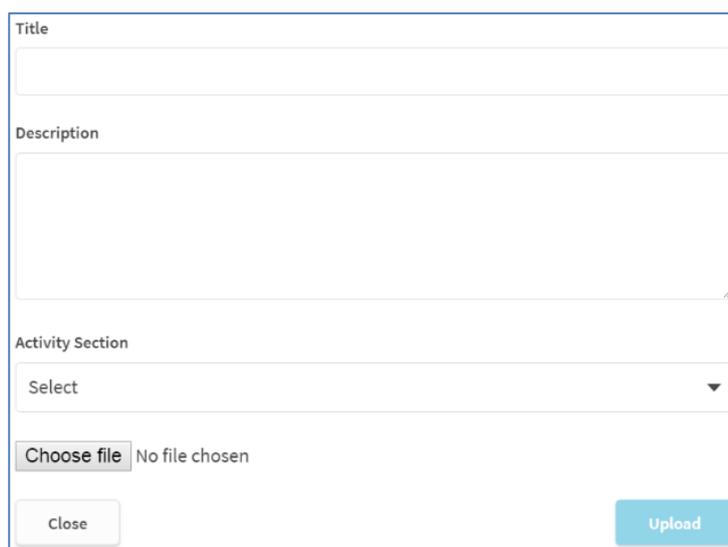
1. Navigate to the participant's Award Section.
2. Click the deleted activity.
3. Click **Restore Activity**.



5. Adding a document on behalf of a participant

To add a document to a participant's Award:

1. Within the participant's Award level, click the **Documents** tab.
2. Click **Upload File**.
3. Insert the title and description.
4. Select the Activity Section that is related to the document from the dropdown list.
5. Choose the file and click **Upload** at the bottom of the screen.



The screenshot shows a form for uploading a document. It has three main sections: 'Title' with a text input field, 'Description' with a larger text area, and 'Activity Section' with a dropdown menu currently set to 'Select'. Below the dropdown is a file selection area with a 'Choose file' button and the text 'No file chosen'. At the bottom of the form are two buttons: 'Close' on the left and 'Upload' on the right.

Note: The file size is limited to 20MB. And the file type is limited to the following:

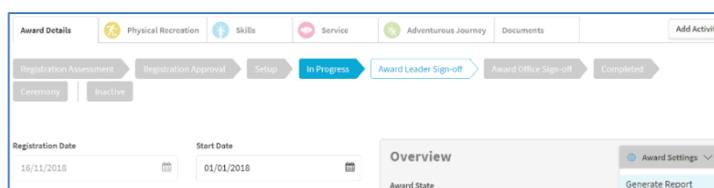
- Activity Logs: jpg, png
- Activity/Award files: jpg, png, doc, docx, xls, xlsx, ppt, pptx, pdf, mp4
- Profile image: gif, jpg, png

6. Generating a participant's Award Summary or Award Detail report

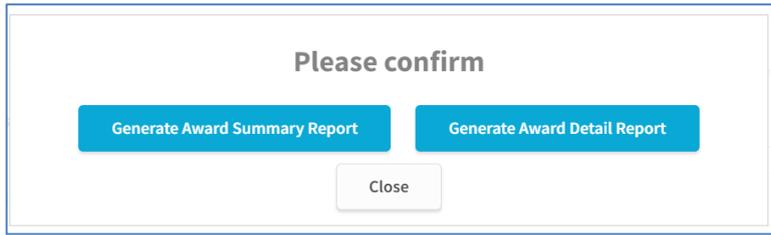
As an Award Leader, you can download a PDF containing all a participant's Award information or a one-page summary report.

To download a either report:

1. Navigate to the participant's Award.
2. From the tab **Award Details** tab, click **Award Settings**.
3. Click **Generate Report** and confirm your choice.
4. A PDF will be downloaded, and you can save it as needed.

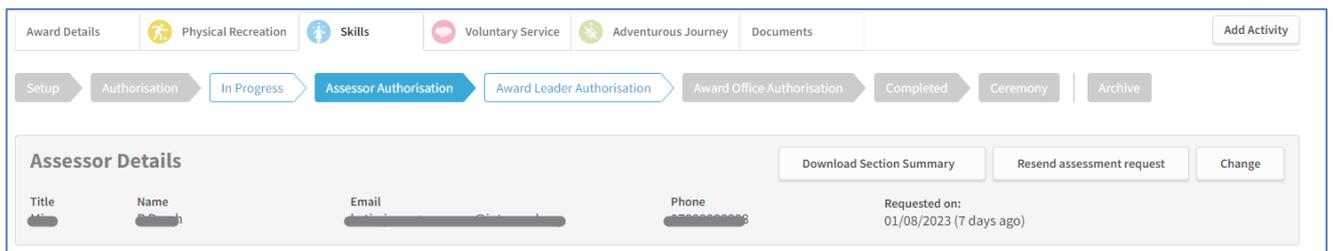


The screenshot shows the 'Award Details' page in a web application. At the top, there are several tabs: 'Award Details', 'Physical Recreation', 'Skills', 'Service', 'Adventurous Journey', 'Documents', and 'Add Activity'. Below the tabs is a progress bar with steps: 'Registration Assessment', 'Registration Approval', 'Setup', 'In Progress', 'Award Leader Sign-off', 'Award Office Sign-off', and 'Completed'. There are also buttons for 'Ceremony' and 'Inactive'. Below the progress bar, there are two date pickers: 'Registration Date' (16/11/2018) and 'Start Date' (01/01/2018). On the right side, there is an 'Overview' section with a dropdown menu for 'Award Settings' and a 'Generate Report' button.



If necessary, you can download a Section Summary of a specific activity as well.

1. Navigate to the specific activity.
2. Click on **Download Section summary**.
3. PDF will download with activity details.



Note: This document contains participant private information and should be treated appropriately.

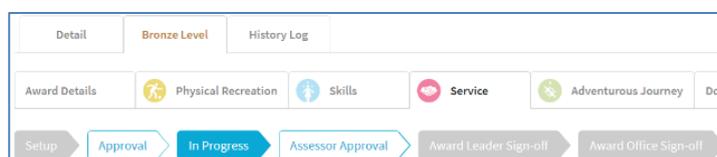
7. Submitting a section on behalf of a participant

As an Award Leader, you can submit a section for **Award Leader Sign-Off** on behalf of a participant.

Note: It is recommended that all logs have been added and the section is complete based on minimum time requirements and minimum hours required before you submit the section. If this is not done, and there are not extenuating circumstances that your Award Office are aware of, then the Award may not be approved/verified.

To change the status of a section to **Award Leader Sign-off**:

1. Navigate to a participant's Award Section.
2. Change the status of the section from **In Progress** to **Assessor Approval** by clicking on the **Assessor Approval** button in the workflow bar. (The colours of the workflow button will change when you do this.)



If Assessor approval is received via the automated email from the ORB, the workflow bar will move automatically to **Award Leader Sign-off** when approval is given.

If assessment is received in-hand or via a physical document, the Award Leader can move the workflow bar manually to **Award Leader Sign-off** once you have uploaded the report in the documents section tab.

Once the section is moved forward to **Award Leader Sign-off**, the section will be displayed in the **To-Do List** of your Award Centre under the **Section Sign-off** tab.

The section must be reviewed before sending it to **Award Office Sign-off**. This can be done through the **To-Do List** or the workflow bar.

Reviewing Awards Submitted for Award Sign-off

Once a participant has completed all sections of their Award, the Award is ready for their Award Leader's sign-off. Participants must move their Awards forward for your sign-off.

There is a pop-up that appears for the participants at this stage.

1. Reviewing Awards that have been submitted to your Award Centre for sign-off

To review Awards that have been submitted to your Award Centre for sign-off:

1. From the **To-Do List** select the **Award Sign-off** tab.

2. Click the participant requesting sign-off.
3. Click their Award level tab.
4. Review each of the sections and logs by moving from one Section to the next.

2. Submitting an Award on behalf of a participant

As an Award Leader, you will be submitting Awards to the Award Office on behalf of your participants. Once they have been reviewed, you can Revise or Approve an Award.

From the Award **Details** tab, you can **Approve** or **Revise** the Award.

If you click **Revise**, the Award will be sent back to the participant for their review. You will be prompted to include a note to the participant with the reasons for revision.

If you click **Approve**, the Award will be sent to the Award Office for verification. You will be prompted to include a note to the Award Office, should you wish to include one.

Note: If there are any special circumstances surrounding the Award, they should be included in this note. Participants do not have access to the contents of this note. It is only visible to Award Leaders and the Award Office through the **History Log**.

3. Communicating revisions from the Award Office

If the Award Office does not verify an Award, it is sent back to the Award Leader. These Awards will appear in the **Award Verification** tab. In these cases, there will be an indication in the **Message** column to show that it has been returned. The reasons for return will be included in a note from the Award Office.

ID	First Name	Last Name	Previous Level	Current Level	Date Submitted to Award Office Authorisation	Weeks Completed / Required	Message	Award made	Action
78824	Evany	Osaka	---	Gold	21/03/2023	2 / 156	Returned by Award Office (without a revision note)	Gold	Approve Revoke
110402	Paul	Flinders	---	Gold	21/03/2023	2 / 78	Returned by Award Office (with a revision note)	Gold	Approve Revoke

Award Office	Weeks Completed / Required	Message
	2 / 156	Returned by Award Office (without a revision note)
	2 / 78	Returned by Award Office (with a revision note)

Note: For Gold participants, the Award Office will not be able to sign off the Gold Award before their 16th birthday. As an Award Leader you will be able to approve and send to the Award Office, but this cannot be approved by them until the participant turns 16.

The participant will see this message as they send the Award for authorisation

Note: You have completed all sections of your Award. You can now submit it to your Award Leader for Authorisation. You can also add a personal note below.

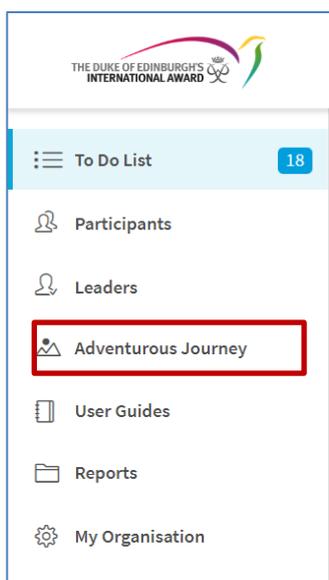
Please note, that your Award cannot be signed-off until you are 16 years of age.

Adventurous Journey Events and Templates

Note: The Adventurous Journey Section of the Award is currently under review by the Foundation. The guidance provided in this section is current as of 1 August 2022.

Using the Online Record Book, Award Leaders can create and manage new Adventurous Journey Events and Templates. The Preparation and Training portion of the Adventurous Journey is not editable by Award Leaders or Award Coordinators.

To create Adventurous Journey Events or Templates:



1. Adventurous Journey Events

An Adventurous Journey Event is a Practice or Qualifying Journey that is set up by the Award Leader. It is generally used when an Award Centre is facilitating portions of the Adventurous Journey for large groups of participants. Participants can set up Adventurous Journeys (Practice and Qualifying Journeys) on their own as well. Please check with your Award Coordinator or Award Office about which option is used in your Award Centre.

The advantage of setting up an Adventurous Journey Event for your participants is that you can assign a group of participants to a specific event with the same details.

Creating a new Adventurous Journey Event

To create a new Adventurous Journey Event:

1. Select **New Adventurous Journey Event**.

2. Add the details and give the Adventurous Journey a name to make it identifiable to you and your participants. You will need to create separate events for Practice and Qualifying Journeys.
3. Click **Save**.

Inviting participants to an Adventurous Journey Event

To invite participants to an Adventurous Journey Event:

1. Navigate to the Adventurous Journey you would like to add the participants to. Events created by you will be displayed under the **My Events** tab. Journeys created by other Award Leaders in your Award Centre will be displayed under **All Events**.

2. Click the event **ID**.

ID	Name	Journey Category	Journey Activity	Journey Type	Award Unit	Start Date	End Date	Created by	Participants
680833	AJ Event for Training	Practice	Cycling	Expedition	Deampton	07/12/2018	08/12/2018	(AwardLeader)	0

3. Click the **Participants** tab

4. Click the **Manage Participants** button in the top right.

ID	First Name	Last Name	Goal	Finished	Assessor approve	Observations	Actions
PN00002025	John	May	Details	⬇️	⬇️	View	...
PN000077848	Yogesh	Sharma	Details	⬇️	⬇️	View	...

5. Only the participants in the Award level of the Adventurous Journey event will be displayed. (i.e. You cannot assign a Gold participant to a Bronze journey.)

6. Select the participants you wish to invite by starting to type each name.

ID	First Name	Last Name	Email	Award Level	Actions
2595	John		mail@johncmay.net	BRONZE	Remove
56887	Yogesh		info@SysAdmin101.com	BRONZE	Remove
172492	Sylvia		testaward00+114@gmail.com	BRONZE	Remove
578216	Sarah	(Participant)	Robson_Participant@Test-Email.co.uk	BRONZE	Remove
580202	Einstien		593+jwhM1@gmail.com	BRONZE	Remove
580136	Olivia		593+jwhF@gmail.com	BRONZE	Remove

7. Click **Save changes**.

Note: You can remove participants at any time by selecting the option **Remove**.

Once you have linked participants to an Adventurous Journey Event, they will be notified, and the Event details will be displayed on their Profile. You will not need to approve an Adventurous Journey that is set up by you or another Award Leader as an Event.

Adding files to an Adventurous Journey Event

To add files or documents to an Adventurous Journey Event:

1. Navigate to the Adventurous Journey Event you would like to add files to.

2. Select the tab **Additional files**.

3. Click **Upload File**. These files will also appear for participants in the *Documents* tab of their Award.

uploaded by	Date	Section	Assessor report	Action
No results				

- In the pop-up, give the file a title and description. You will then upload your file and select **Upload**.
Note: there is a maximum file size limit of 20MB and there may be limitations on the type of file that can be added.

- You can view, edit and delete files by selecting **Edit** or **View more**.

Section	Assessor report	Action
Adventurous Journey	✕	<input type="button" value="Edit"/> <input type="button" value="View more"/>

Deleting an Adventurous Journey Event

To delete an Adventurous Journey Event:

- Navigate to the Adventurous Journey Event you would like to modify.
- If you are deleting the event, you must remove or re-assign all participants before you can delete the Event. You will see a warning message to complete this. Note: Removing a participant from an Adventurous Journey Event will remove any content they have loaded within the Event.
- Click **Adventurous Journey Settings**.

- From the pop-up, click **Remove** and confirm your choice.

2. Adventurous Journey Templates

An Adventurous Journey Template can be set up by an Award Centre for recurring Adventurous Journey Events within the same Award Centre.

The advantage of setting up an Adventurous Journey Template for your Award Centre is so that you can reuse journeys, with the same details, that happen repeatedly within your Award Centre.

Creating a new Adventurous Journey Template

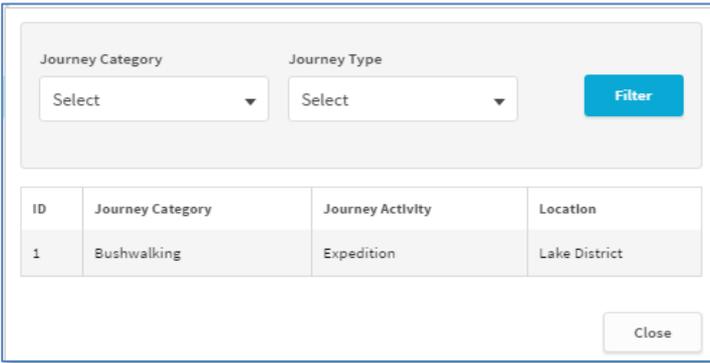
To create a new Adventurous Journey Template:

1. Select **Adventurous Journey** from the left-hand menu.
2. Select **New Template** in the top right.
3. Fill in the details of your template.
4. Click **Save**.

Using Adventurous Templates

All templates are found in the **Adventurous Journey Templates** tab and can be used when creating a new event.

1. Select Adventurous Journey from the left-hand menu.
2. Select New Adventurous Journey Event.
3. Click the option Select Template displayed at the top of the screen.
4. In the pop-up list, click the template you would like to use. You can filter by journey category and type to narrow your choices if you have a lot of templates.
5. The template will automatically populate your new event. You can make changes to dates and details at this time.



The screenshot shows a filter interface with two dropdown menus: 'Journey Category' and 'Journey Type', both set to 'Select'. A blue 'Filter' button is to the right. Below the filters is a table with the following data:

ID	Journey Category	Journey Activity	Location
1	Bushwalking	Expedition	Lake District

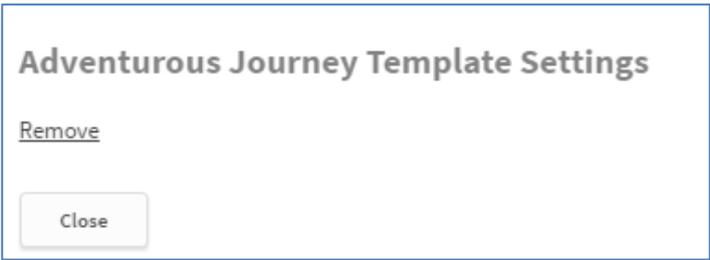
A 'Close' button is located at the bottom right of the interface.

6. Click **Save**.

Deleting an Adventurous Journey Template

To delete an Adventurous Journey Template:

1. Navigate to the Adventurous Journey Template you would like to modify.
2. Click **Adventurous Journey Template Settings**.
3. From the pop-up, click **Remove** and confirm your choice.

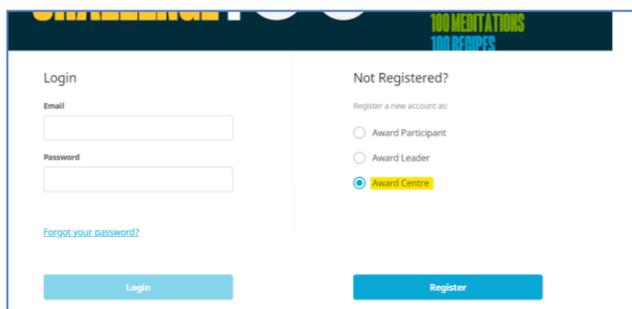


The screenshot shows a dialog box titled 'Adventurous Journey Template Settings'. It contains a link labeled 'Remove' and a 'Close' button at the bottom.

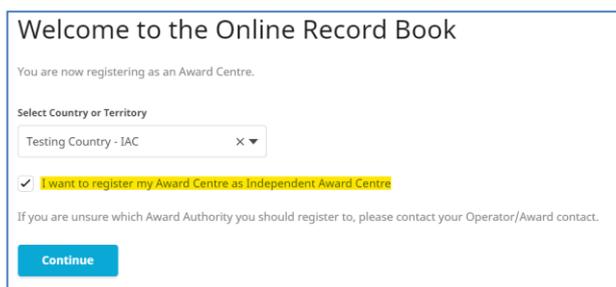
Other Processes and Useful Functionality

1. Registering your Award Centre

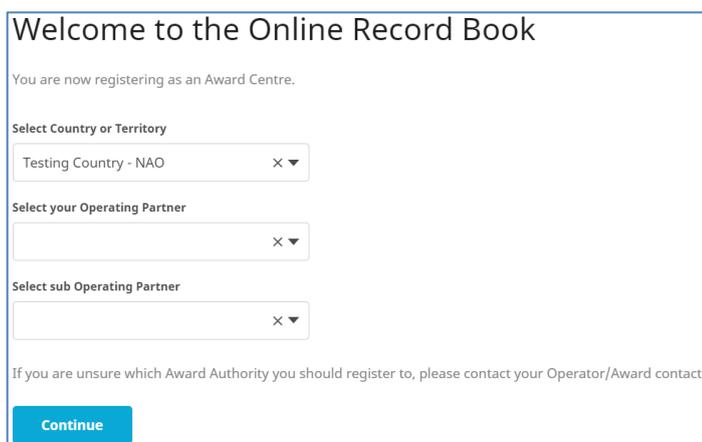
*This guidance applies only to those setting up a new Award Centre. **This should be carried out by the Award Coordinator.***



If your organisation is not yet registered as an Award Centre on the Online Record Book, you can complete registration by selecting the **Award Centre** registration option on the ORB login page at www.onlinerecordbook.org. This should only be done in consultation with your Award Office or Operations Manager.



If you are registering as an Independent Award Centre (IAC), you will need to check the box accordingly (the checkbox will only appear if you're setting up in a country or territory that has IACs).



You may be prompted to register under an Operating Partner/Authority. The ORB will filter accordingly depending on your selection. Please contact your Award Office/Operations Manager if you are unsure.

The browser's back button can be used if you want to review/modify the details inserted.

Organisation Details

Organisation Name

Organisation Type

Are you already running the Award?
 Yes
 No

Organisation Address
 Address First Line

Click **Continue** to proceed through each part of the registration, inserting the Award Centre details as required.

Authorising Contact / Licence Holder

Please fill in the following details for the authorising contact / licence holder at your organisation

Title

First Name Middle Name Last Name

Role in Organisation

Email Confirm email

Phone number Phone type

same as Main Award Coordinator

Continue

Depending on settings from your Award Office, you may be required to include details of your Award Centre's Authorising Contact / Licence Holder. This will be the person who signed your licence agreement or the senior manager responsible for your organisation.

Also depending on settings, you may have the option to select **same as Main Award Coordinator**, to be used if you fulfil both roles.

Note: Unless they are also an Award Coordinator or Leader, the Authorising Contact/Licence Holder does not have a login to the ORB. Their details are added as only as a record.

Award Coordinator

You will be the first Award Leader in your organisation. You will have rights to add more Award Leaders, Participants and manage the process of the Award through the Online Record Book system.

Title

First Name
Middle Name

Last Name

Date of Birth

Gender
 Female
 Male
 Prefer not to say
 Prefer to Self-Identify

What is your role in your organisation? (optional)

As Award Coordinator, your details will then need to be added. Completing this information, along with adding a password and reviewing the Terms & Conditions and other ORB related agreements, acts as your registration for the ORB.

The Award Coordinator is an adult volunteer or paid staff member who is the key contact at an Award Centre, Open Award Centre or IAC. The Coordinator is responsible for setting up and running the Award within the Centre, supporting Award Leaders, overseeing Award Groups / Unit and processing the authorisation of Awards. The Coordinator is often also an Award Leader or may take on the role of another adult Award volunteer.

Online Record Book Account

To work on the Online Record Book (ORB) you need a personal ORB account.

Email

Password
Repeat Password

At least 8 characters long
Include at least one number character
Include both lower and upper case characters

[International Terms & Conditions](#)

I have read the Terms and conditions and agree with them.
 I Agree to the Volunteer Code of Conduct. For more information [click here](#).

Finish

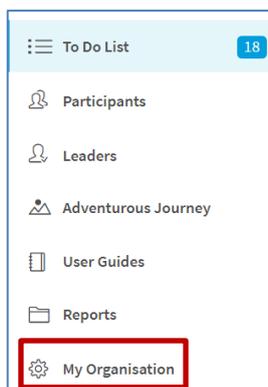
As well as the ORB Terms & Conditions, you may be required to agree to a code of conduct or other local rules. This depends on the set up by your Award Office.

Note: You will receive two emails following registration. One to validate your email is correct and another once your Award Office/Operations Manager has reviewed and approved the registration.

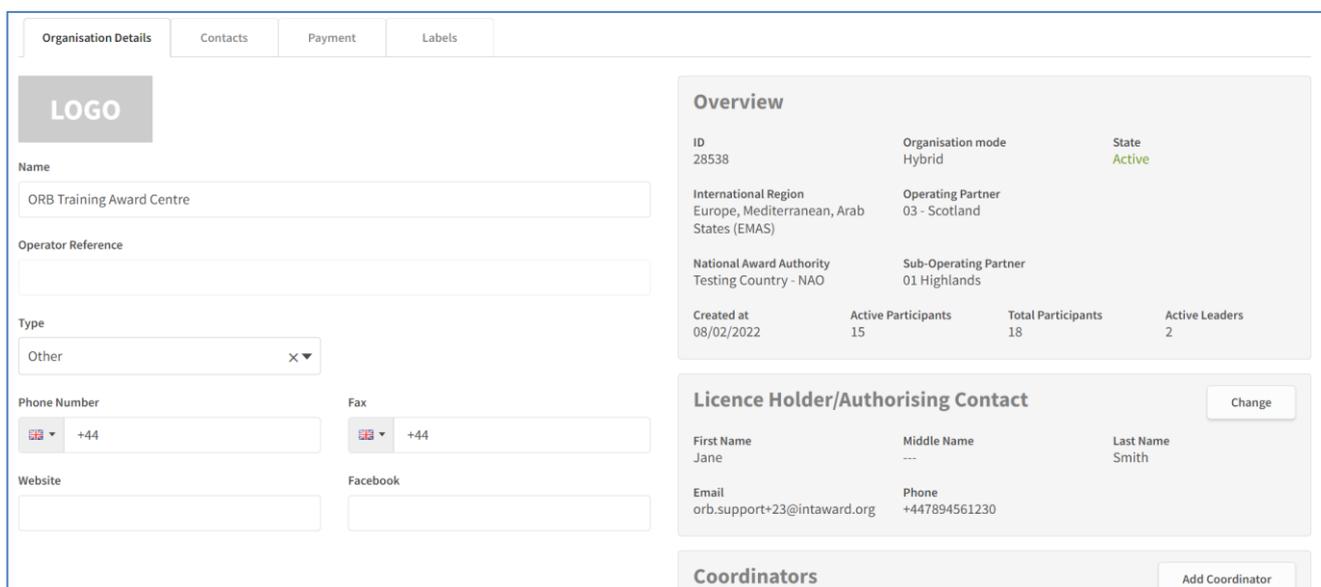
2. My Organisation

The My Organisation page of your ORB contains an overview of the details, contacts and payment options associated with your Award Centre.

You can browse your Award Centre details and contacts by clicking on **My Organisation** from the left-side menu.



Your organisation details can be updated as needed, but this should only be carried out by, or with permission of your Award Coordinator.

A screenshot of the 'My Organisation' page. At the top, there are four tabs: 'Organisation Details' (selected), 'Contacts', 'Payment', and 'Labels'. The main content area is divided into two columns. The left column contains a 'LOGO' placeholder and several input fields: 'Name' (filled with 'ORB Training Award Centre'), 'Operator Reference', 'Type' (a dropdown menu with 'Other' selected), 'Phone Number' (with a country code dropdown set to '+44'), 'Website', 'Fax' (with a country code dropdown set to '+44'), and 'Facebook'. The right column contains an 'Overview' section with a table of key metrics: ID (28538), Organisation mode (Hybrid), State (Active), International Region (Europe, Mediterranean, Arab States (EMAS)), Operating Partner (03 - Scotland), National Award Authority (Testing Country - NAO), Sub-Operating Partner (01 Highlands), Created at (08/02/2022), Active Participants (15), Total Participants (18), and Active Leaders (2). Below this is a 'Licence Holder/Authorising Contact' section with a 'Change' button and fields for First Name (Jane), Middle Name (---), Last Name (Smith), Email (orb.support+23@intaward.org), and Phone (+447894561230). At the bottom right, there is a 'Coordinators' section with an 'Add Coordinator' button.

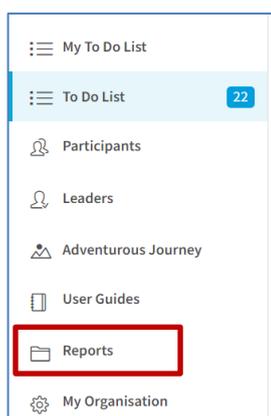
The Award Coordinator and Award Leaders associated with your Award Centre will appear under the contacts tab after their registration is approved. You are also able to add any other contacts for your records. Award Coordinators and Leaders have a profile which enables them to login to the ORB, but other contacts that you add will not, they will just exist on the ORB as records. The only exception is if your Award Centre has an Award Verifier role, which has the permission to approve Awards. Please contact your Award Office if you have any questions about this role.

Organisation Details		Contacts	Payment			
						New Contact
Search		Status				
<input type="text"/>		Select		Filter		
Number of records: 15						
ID	First Name	Last Name	Email	System Rights	Status	
AL000038107	Test	Award Leader	orb.test0604202@intaward.org	Leader	Archived	

Depending on permissions set by your Award Office, your Award Coordinator may be able to add new Award Leaders, after a new contact is set up. Contact your Award Office to see if this feature is available for your Award Centre. New Award Leaders and Award Verifiers set up in this way will receive an email notification with link to complete their registration.

The **Payment** tab indicates the payment types that are available to your participants when they register. You cannot amend this list; it is set by your Award Office.

3. Reporting



A range of reports are available to help provide information and records of participant progress. The reports available are regularly updated and can be found from **Reports** in the left side menu.

Name	Fields included	Recent updates	Action
Participant Award Progress <i>Report detailing participant section choices and progress</i>	Award Centre, Participant ID, First Name, Middle Name, Last Name, Email, Birth Date, Award Level, Award Start Date, Award Leader ID, Award Leader, Registration Approval Date, Percent Complete, Award Status, Award Completion Method, Award Completion Date, Major Section, Section, Activity, Status, Hours Required, Hours Completed, % Complete	New fields added: 1. Date of Birth and Email Address fields have been added 2. Data has been reformatted (aggregated) in the background to enable larger amounts of data to be reported on and to prevent the reports timing out. COMING SOON: A request to have all participant data on one record (row), rather than one record per activity. It's likely that we will trial this in a new report. (To be Confirmed): Ability to select archived participants	<input type="button" value="Run"/>
Award Completion <i>Participant Award completion date, contact and personal information including gender</i>	Country, Operating Partner, Sub-Operating Partner, Award Centre, Award Centre Id, Award Centre Address Line 1, Award Centre Address Line 2, Award Centre Town/ City, Award Centre Postal/ Zip Code, Award Leader Authorisation Date, Award Status, Award Level, ID, First Name, Middle Name, Last Name, Date of Birth, Gender, Primary Phone Number, Primary Phone Type, Email, Address Line 1, Address Line 2, Town / City, Postal/ Zip	New fields added: 1. This report also includes data from inactive Award Centres 2. Previous Awards can now be seen in 'Last Completed Award on the ORB' and 'Award completed outside ORB'. Other new fields had been added but it caused errors in the report for	<input type="button" value="Run"/>

Within the reporting page, you will see a table listing the name of each report, the fields included and any recent updates or notes. Finally, you will see a **Run** button in the right-hand column. Click this to start preparing a report.

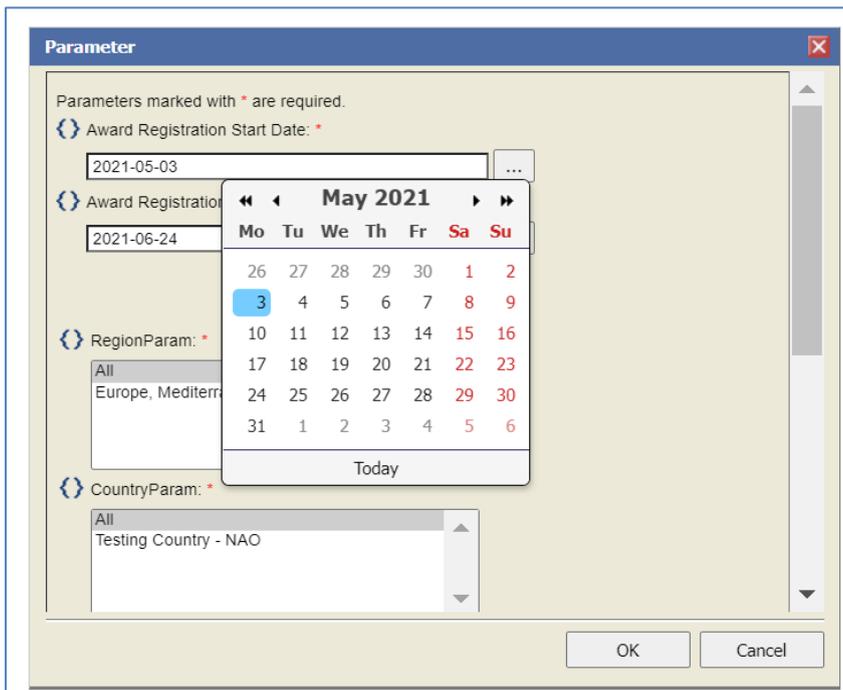
When **Run** is clicked, a new window will open with a list of parameters to select. Parameters such as Region, Country, Operating Partner etc. should be already selected and will not need to be changed. You can only see data from your Award Centre, and your Award Centre is pre-selected for the report. However, if parameters are changed for some reason, you may need to re-select them to start the report. Either way, you will need to select the data range from which you need the report to gather the data you need. The button with an ellipsis (three dots) opens the date selector.

Parameter

Parameters marked with * are required.

Europe, Mediterranean, Arab States (EMAS)

Testing Country - NAO



Once the date range is selected, clicking on **OK** will run the report. Once created, the report will appear in a table for you to view as required.

Note: Reports can sometimes take a little while to be created.

If you need to download a report, there are several options available to you. **Whichever option is needed, great care must be taken when downloading or sharing reports. Only those with appropriate permission to view the data should do so, and if you are a sharing data by email or other electronic means, you MUST ensure the file is password protected before you send it.**

BIRT Report Viewer
Showing page 1 of 1

Participant Award Progress Report

Award Registration Start Date	03 - May - 2021
Award Registration End Date	24 - Jun - 2021
International Region	Europe, Mediterranean, Arab States (EMAS)
Country	Testing Country - NAO
Operating Partner	01 - England
Sub-Operating Partner	04 North
Award Centre	TEST Award Centre 2021 (IAF)

© The Duke of Edinburgh's International Award Foundation
This reports contain confidential information which must only be used for the purpose the report was generated.
If you are sending this data by email or other electronic means you MUST make sure the file is password protected before you send it.
When no longer required, this report must be securely destroyed (e.g. shredded).
Report generated by Peter Oney on 13 - May - 2022

Award Centre	Participant ID	First Name	Middle Name	Last Name	Email	Birth Date	Award Level	Award Start Date	Award Leader ID	Award Leader	Registration Approval Date	Percent Complete	Award Status	Award Completion Method	Award Completion Date	Major Section	Section Activity Status	Hours Required	Hours Completed	% Complete
--------------	----------------	------------	-------------	-----------	-------	------------	-------------	------------------	-----------------	--------------	----------------------------	------------------	--------------	-------------------------	-----------------------	---------------	-------------------------	----------------	-----------------	------------



Click this icon to export in csv format.

Click this icon to export in Excel or pdf format.

Export Data

Available result sets
Participant Award Progress Report

Available Columns

- award_unit_name
- participant_first_name
- participant_middle_name
- participant_last_name
- award_id
- award_level
- award_start_date
- leader_name
- award_registration_approval_date
- award_completed_portion

Selected Columns

Export format: CSV (*.csv)

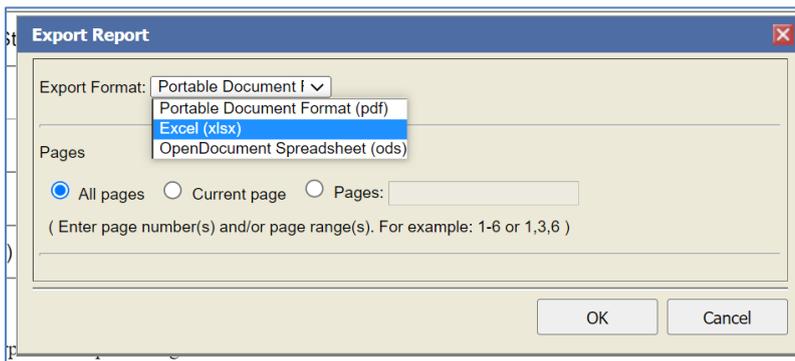
Output encoding: UTF-8
 Other (If blank, use the local encoding)

Separator: Comma (,)

Export column's data type Export column as locale neutral
 Export data with Carriage Return

OK Cancel

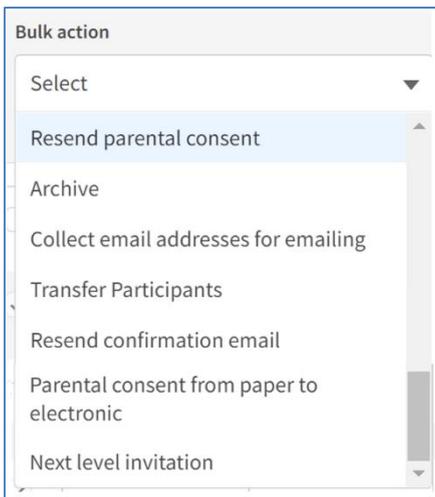
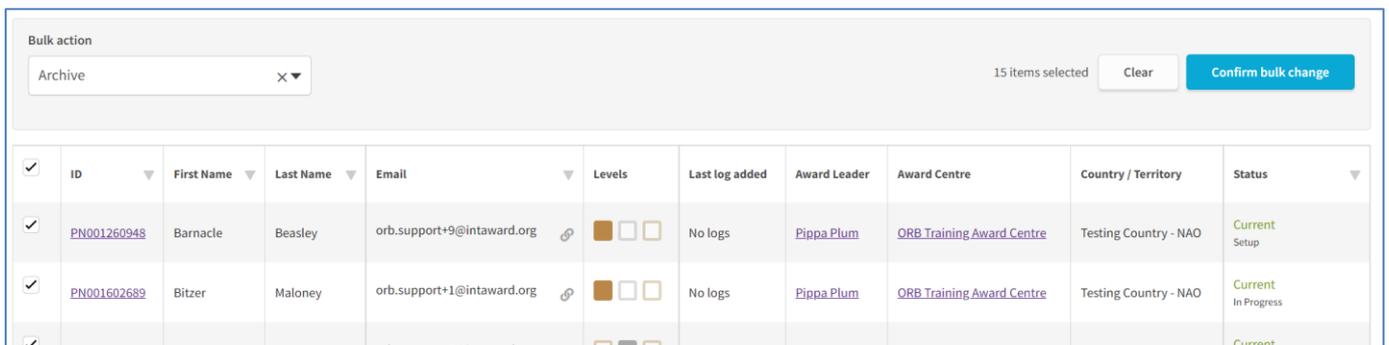
If exporting in csv format, you can choose which data fields to export, by selecting from Available Columns.



Select if you are exporting in pdf or excel (or OpenDocument).

4. Bulk Actions

A range of bulk actions are available to help you save time. This option is found in the top left-hand corner of the **Participant** list.



To run a bulk action, you first need to select the required action from the drop-down menu. Once selected, you can check the boxes to the left of each participant, or the box at the top of the table to select all participants. Finally, click **Confirm bulk change**. **Note:**

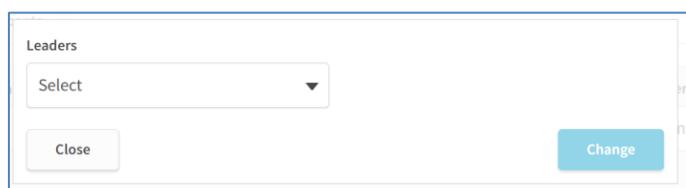
- You can only select those participants to whom the bulk action applies (for example, you cannot change the parental consent to electronic if it is already electronic, if there is no parental email added, or if the participant is over 18 years old).
- Checking the box at the top of the table will select only those participants for whom the bulk action applies on that page. So, if you have two pages of participants, you will need to run the action for each page.

The following bulk actions are available:

- **Resend parental consent:** Where parental consent has been selected as electronic (by email) this action will resend the consent request to the parent/guardian email address given during registration.
- **Archive:** This will archive the participant. They will no longer be able to access their ORB without contacting their Award Leader.



- **Collect email addresses for sending:** This enables you to copy email addresses (you will need to select them and copy the addresses) or add them (as bcc) to an email when you select Prepare new email.
- **Transfer participants:** This transfers the current Award of the participant to another Award Leader. A dialogue box will open, allowing you to select from the list of Award Leaders in your Award Centre.



- **Resend confirmation email:** During registration, a participant will receive an email asking them to confirm that their email address is current and correct. This will resend the confirmation email to the participants selected.
- **Parental consent from paper to electronic:** This enables you to change the parental consent method to electronic (email). It will only apply where electronic is not already selected and an email address is added
- **Next level invitation:** This will prompt an email being sent for participants to register for the next Award Level. **Note:** This feature may send an email even if a participant is not eligible to start the next level or if they have already started their Gold Award (and so there is no further level). In these situations, the participant will not be able to complete the registration.

5. Mimic function

Award Leaders can log in as one of their participants to provide support on the system or to see what error a participant encountered. This is known as the **mimic user feature**.

To log in as a participant, you will need to sign-out of your ORB account.

Login

Email

awardleader70@gmail.com/participant40@gmail.com

Password

The same password as you use for you own account.

[Forgot your password?](#)

Login

In the **Email** field, type in your **Award Leader email address**, a **forward slash (/)** followed by the **participant's email address**.

Example:
awardleader70@gmail.com/participant40@gmail.com
 (Your email address/participant's email address)

Password: The same password as your Award Leader login password.

When an Award Leader is logged in as a participant, they can view the full profile, sections, activities and logs of the participant. They can investigate what error a participant might encounter, guide a participant on the system or make changes on the participant's profile.

Any changes you make on the participant's profile will be reflected in the History Log under your name with the date, time and description of the changes.

Detail		Bronze Level	History Log
Date / Time	Description		
10/12/2018 13:05	Administrator "H [redacted] (AwardLeader)" has logged in as [redacted] (Participant)"		

Note: Remember to log-out as the participant when you have finished supporting your participant.

6. Undelivered Email

Depending on local settings by your Award Office, you may have access to Undelivered Emails in your To Do List. In this tab, a list of those emails generated by the ORB which have not been successfully delivered will be listed. A suggested action will be stated, as well a reason and an action. For example, if a participant email address is incorrect, a link to the participant through the Participant ID will enable you to correct the email address and resend confirmation. Where an Assessor email is incorrect, you can return the assessment request to the participant, who will then be prompted to find out, and correct, the email address.

Registration 6		Activity Authorisation 2		Section Authorisation 2		Adventurous Journey		Award Authorisation		Unassigned Participants		Undelivered Emails 9	
Action Requested	Advice	Email	Reason	Participant Name	Participant ID	Date	Action						
Activity Assessment Request	Check assessor email.	assessororb@intaward.org	View	Jane Smith	PN001242036	30/11/2021	Clear Return to Participant						
Activity Assessment Request	Check assessor email.	section.assessor@intaward.org	View	Jane Smith	PN001242036	04/11/2021	Clear Return to Participant						
PARTICIPANT_REGISTRATION_APPROVAL	Check participant's email.	orb.test201021@intaward.org	View	Fred Flintstone	PN001316549	20/10/2021	Clear						
Email Confirmation	Check participant's email.	orb.test2.201021@intaward.org	View	Duplicate Test	PN001316552	20/10/2021	Clear						

When viewing the reason (for the undelivered email) you will sometimes see technical language (for example: *550 5.4.1 Recipient address rejected: Access denied. AS(201806281)*). This will usually mean that the email system used by the recipient has blocked the email. In these situations, the recipient should be informed and a request with their IT provider made to unblock the email.

7. Labels

Depending on local settings by your Award Office, you may have the labels function available. The labels are designed to allow Award Coordinators and Leaders the ability to more easily manage groups of participants according to their needs at the Award Centre. They can be added or removed by Award Leaders whenever needed but in some circumstances, it will only be the Award Coordinator who can create new labels or delete existing ones.

There are two types of labels:

1. Participant Labels- These Labels are applied to the participant throughout the entirety of their Award journey, through each Award level.
2. Award Level Labels- These Labels are applied to a participant's specific Award level and do not remain with the participant as they move through the Award (though they remain in place in the Award Level and reports unless removed).

Labels are assigned to participants and can be viewed by the Award Leaders, Operators and Foundation staff only. They cannot be viewed by participants. There are two ways to create labels:



1. An NAO/Operator created label (these appear as green). These are created by the Operator and are available for any Award Leader to assign to their participants.
2. An Award Centre created label (these appear as yellow). These are created by an Award Leader and are available for any Award Leader within that Award Centre to assign to their participants. These labels cannot be used outside of the Award Centre.

Viewing labels

Once assigned, labels can be viewed in one of **four** places.

1. **If you are using participant labels, in** a participant’s detail:

2. **If you are using Award level labels, in** the Award level detail:

The screenshot shows the 'Award Details' page for a participant named Bobby Bobbington. The page is divided into several sections: 'Award Details' (Physical Recreation, Skills, Voluntary Service, Adventurous Journey, Documents), 'Registration Assessment' (Registration Authorisation, Setup, In Progress, Award Leader Authorisation, Award Office Authorisation, Completed, Ceremony, Archive), 'Parent / Guardian Consent' (Printable Parental Consent Form, Parent's relationship, First name of Parent / Guardian, Last name of Parent / Guardian, Parent's / Guardian's Email, Parent's / Guardian's Phone Number, Date Received, Delivery Confirmed), 'Overview' (Award State, Award Mode, Award Centre, Leader), and 'Labels' (Available Labels, Select, AwardLabel). The 'Labels' section is highlighted with a red box.

3. Under Participants, in *My Participants* or *All Participants* (see section below: *Labels in My Participants and All Participants lists*). **Award Level labels will only appear (in the Participants view) where they apply to the current Award level** For example if a participant had progressed to Silver Award from Bronze any Bronze Award Level labels would no longer be visible in the participants view.

4. Under the Participant Registration view

ID	First Name	Last Name	Email	Levels	Last log added	Labels	Award Leader	Award Centre	Status
[Redacted]	Barney	Rubble	[Redacted]	[Redacted]	2 months ago	Forum Test	[Redacted]	TEST Award Centre 2021 (IAF)	Current In Progress
[Redacted]	Fred	Flintstone	[Redacted]	[Redacted]	7 months ago	Forum Test Label 1	[Redacted]	TEST Award Centre 2021 (IAF)	Current In Progress
[Redacted]	Fred	Flintstone	[Redacted]	[Redacted]	7 months ago	Forum Test Label 1	[Redacted]	TEST Award Centre 2021 (IAF)	Current In Progress

The screenshot shows the 'Participant Registration' view. It features a search bar, filters for Email Confirmation, Parent Authorisation, and Payment State, and a 'Filter' button. Below the filters is a 'Bulk action' section with a 'Confirm bulk change' button. The main table lists participants with columns for ID, First Name, Last Name, Registration Date, Level, Email Confirmation, Labels, Parent Authorisation, Payment, Review, and Action. The 'Labels' column shows 'Label 2' and 'Award Centre label Test-NAO-Label'.

Creating labels

Labels created by your National Operator/Award Office will already be available to select. Creating a label for your Award Centre can be done through *My Organisation* and the *Labels* tab, selecting *New Label*. Please note that when creating labels:

- A label cannot be more than 20 characters
- There is no check for duplications or near matches (so the naming of labels and how they are used will need to be considered by all Award staff/volunteers in the Award Centre)

ID	Name	Description	Category	Action
17	Group 1	Test label for Award Centre	PERSON	Edit Delete

Assigning labels

Once labels are created, there are three ways in which they can be assigned to participants:

1. In the *To Do list* (or *My To Do list*), in the *Registration* tab. Here, labels can be assigned as a bulk action.
2. In the *Participants* list, also as a bulk action (also, see the following page).

Bulk action

Assign Labels

3. In a participants' *Detail* tab

Age: 22, Organisation: ORB Training Award Centre, Registration Date: 26/06/2022, State: Current

Level summary table:

	Completed / Required	Last Activity
Physical Recreation	-	-
Skills	-	-
Voluntary Service	-	-
Practice Journey	-	-
Qualifying Journey	-	-

Labels section: Available Labels dropdown menu with 'Select' option.

Removing labels

Labels can be removed on an individual basis or in bulk. Within the participant detail, labels can be

removed by the  symbol. Any label can be removed (or added) by any Award Leader within their Award Centre, but only if it is not assigned to (a) participant(s). An Award Leader can also rename a label, even when it is assigned to (a) participant(s).

Labels section: Available Labels dropdown menu with 'Select' option.

Assigned labels: Year 9 second group, Summer 2022, Label 1, Label 3. Each label has a red 'X' button next to it.

To remove in bulk, follow the same process identified above for assigning (though select 'unassign').

Labels appear in the following reports: Participant Award Progress, Award Completion, Current Active Award and Participants Including Payment status, Voluntary Services Summary Report.

Labels in My Participants and All Participants lists

The screenshot shows the 'My Participants' interface. At the top, there are tabs for 'My Participants' and 'All Participants'. Below this is a filter bar with fields for Level, Search, Participant Status, Award State, Award Leader, Award Label, Activity Category, Last Log Date From, and Last Log Date To. A 'Filter' button is on the right. Below the filter bar is a 'Bulk action' dropdown menu and a 'Confirm bulk change' button. The main part of the interface is a table with columns: ID, First Name, Last Name, Email, Levels, Last log added, Award Labels, Award Leader, and Status. The table contains four rows of participant data. At the bottom left, there is a '20 per page' dropdown. At the bottom right, there is an 'Export Table' button. Red dashed boxes and arrows highlight specific features: the 'Award Label' dropdown in the filter bar, the 'Bulk action' dropdown, the 'Award Labels' column in the table, and the 'Export Table' button. Text boxes provide instructions: 'Labels can be assigned as a bulk action' points to the 'Bulk action' dropdown; 'You can filter participants by label' points to the 'Award Label' dropdown; 'Any labels assigned will appear here. Clicking on a specific label will apply a filter to participants assigned to it.' points to the 'Award Labels' column; and 'Once filtered or sorted you can export the table into Excel' points to the 'Export Table' button.

Labels can be assigned as a bulk action

You can filter participants by label

Any labels assigned will appear here. Clicking on a specific label will apply a filter to participants assigned to it.

Once filtered or sorted you can export the table into Excel

ID	First Name	Last Name	Email	Levels	Last log added	Award Labels	Award Leader	Status
PN001333301	Brice	Bison	[REDACTED]	[Progress]	8 days ago	awardlabel	Grace Kelly	Current Awaiting Organisation Authorisation
PN001333304	Gregg	Greggson	[REDACTED]	[Progress]	5 days ago		Grace Kelly	Current In Progress
PN001333298	Lisa	Simpson	[REDACTED]	[Progress]	8 days ago	Test Award Level	Grace Kelly	Current In Progress
PN001333307	Tester	User	[REDACTED]	[Progress]	a day ago		Grace Kelly	Current In Progress

8. Messaging

The new one-way messaging function in the Online Record Book brings the following two new features:

1. Ability to add comments (instructions, encouraging words) on individual activity logs.
2. Send messages to selected Participants via in-ORB notification and/or email

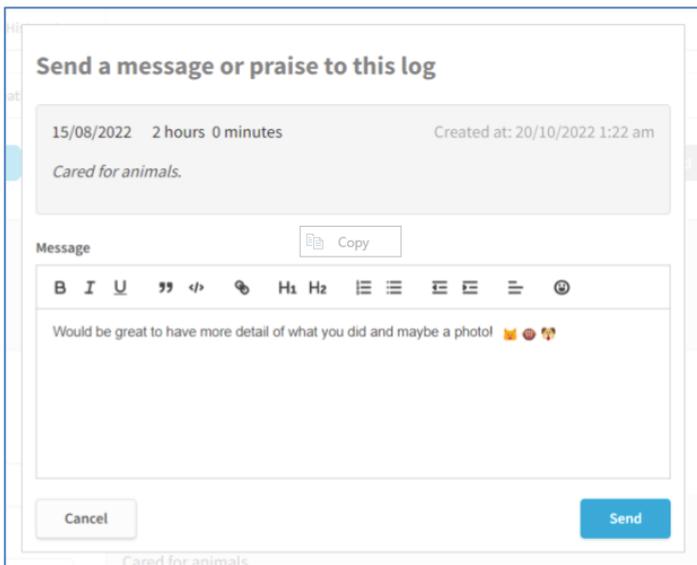
This will allow a more dynamic and interactive participant experience through the ORB, with the option for more bespoke feedback from Award Leaders during a participants journey through the Award.

Adding comments to Participant activity logs

Once you have navigated to the appropriate activity log there will be a comment button located under each log. Clicking on the 'Comment' button opens a pop-up screen that allows Award Leaders to react with a message.

The message can be long or short, it can be formatted, and it can contain emojis.

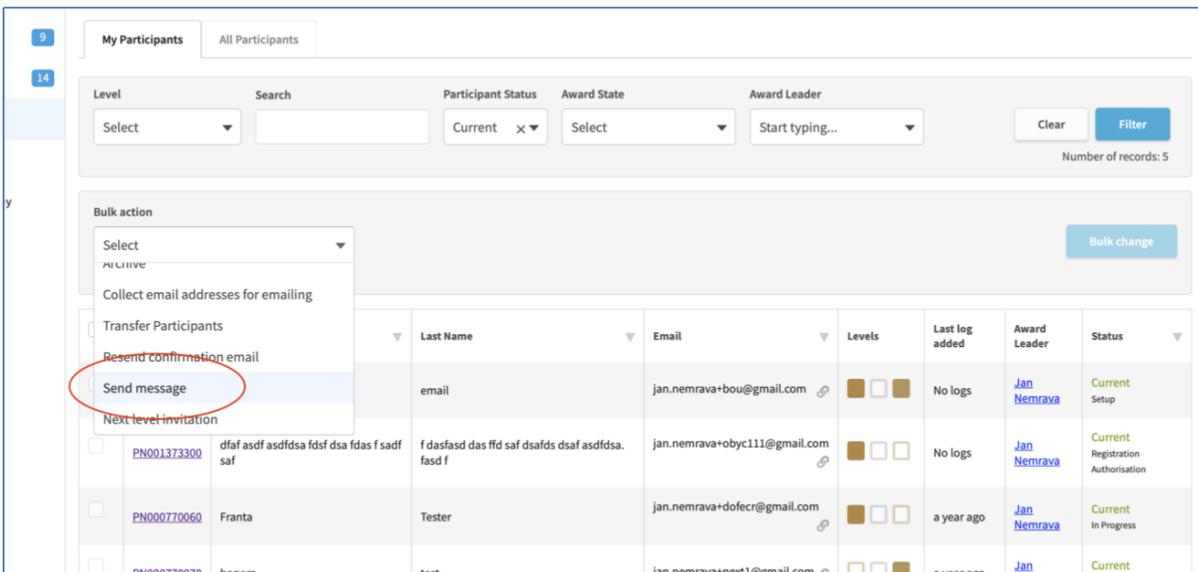
The screenshot displays the Online Record Book interface for a participant named Barney Rubble (PN001048215) at the Silver Level. The interface includes a sidebar with navigation options like 'My To Do List', 'To Do List', 'Participants', 'Leaders', 'Adventurous Journey', 'User Guides', 'Reports', 'My Organisation', and 'Message Center'. The main content area shows the participant's progress through various stages: Setup, Authorisation, In Progress, Assessor Authorisation (highlighted with a 'Copy' button), Award Leader Authorisation, Award Office Authorisation, Completed, Ceremony, and Archive. Below this, the 'Assessor Details' section lists the assessor's name, email, and phone number, with buttons for 'Send Welcome Email' and 'Change'. The 'Activity Detail' section shows an activity log for 'Animal Welfare' with a goal of 'Assisting Organisation Caring for N...'. The log entry is dated 28/03/2022, lasting 1 hour 0 minutes, with the description 'I took a sloth for a walk'. A 'Comment' button is circled in red at the bottom right of the log entry.



Sending messages/emails to a group of participants

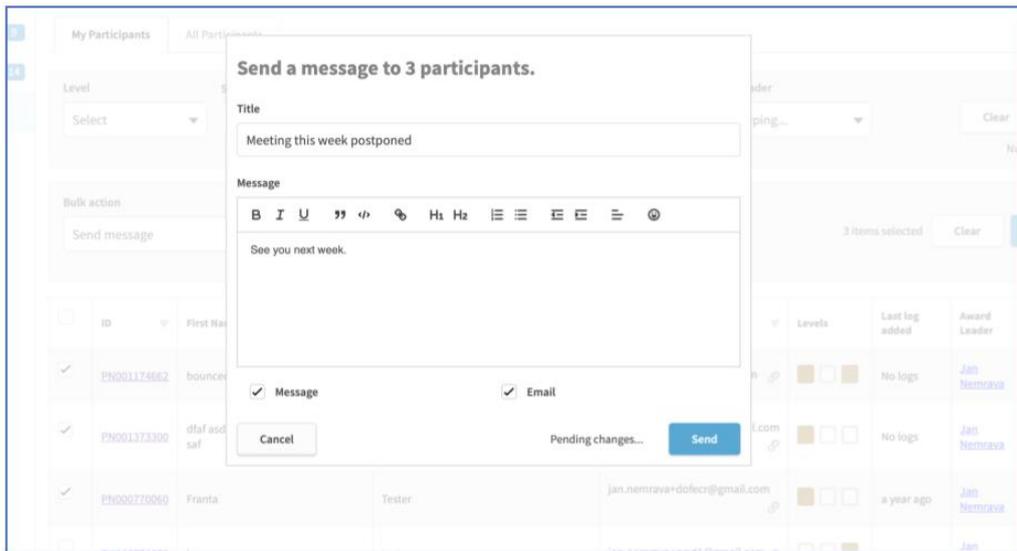
The opportunity to send messages to multiple participants can be achieved by utilising the *Bulk Change* function. Navigating to the *Participants* tab and in the drop-down menu click on *Send message*.

You can then use the tick boxes on the left-hand side to select the participants you'd like to send the message to and select *Bulk Change*.



On the pop-up screen, you need to provide title and body of your message. You can select which delivery channel you want to use.

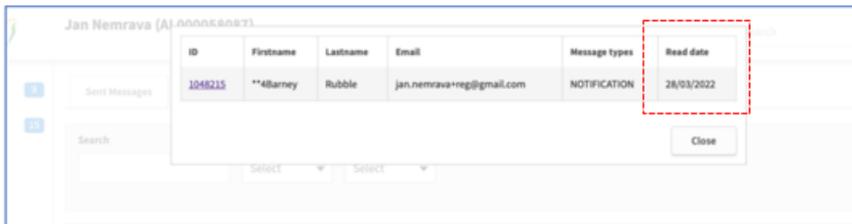
1. First option is message – this will send the message as a notification within ORB. For those Participants using the ORB app, the message will appear as a push notification (no need for login to ORB), or via their notifications menu on for those using the ORB website (which requires user to log into system to retrieve).
2. The second option is to deliver via email.
3. The third is to select both – this is the recommended option for messaging to Participants.



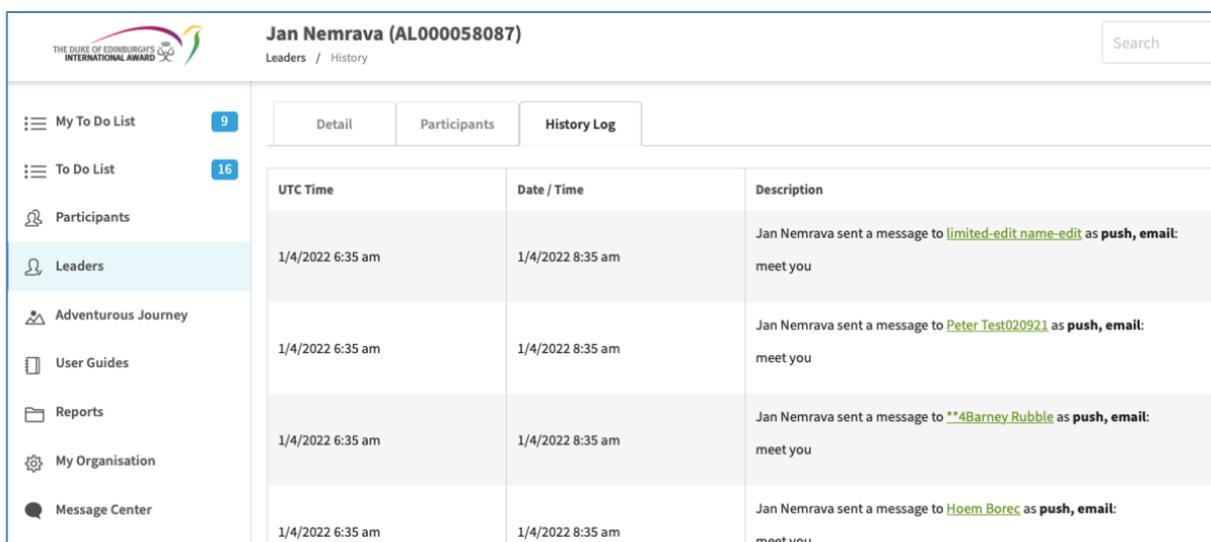
Message History and Audit trail

All messages sent via the ORB are stored in the *message centre* where they can be reviewed. Additionally, you will be able to view whether the message has been read by the participant. **(Messages only)**

If a participant receives an email via messaging, it will be sent from the award leaders email address. If a participant chooses to respond to that email, it will not be saved in the *history log* tab.



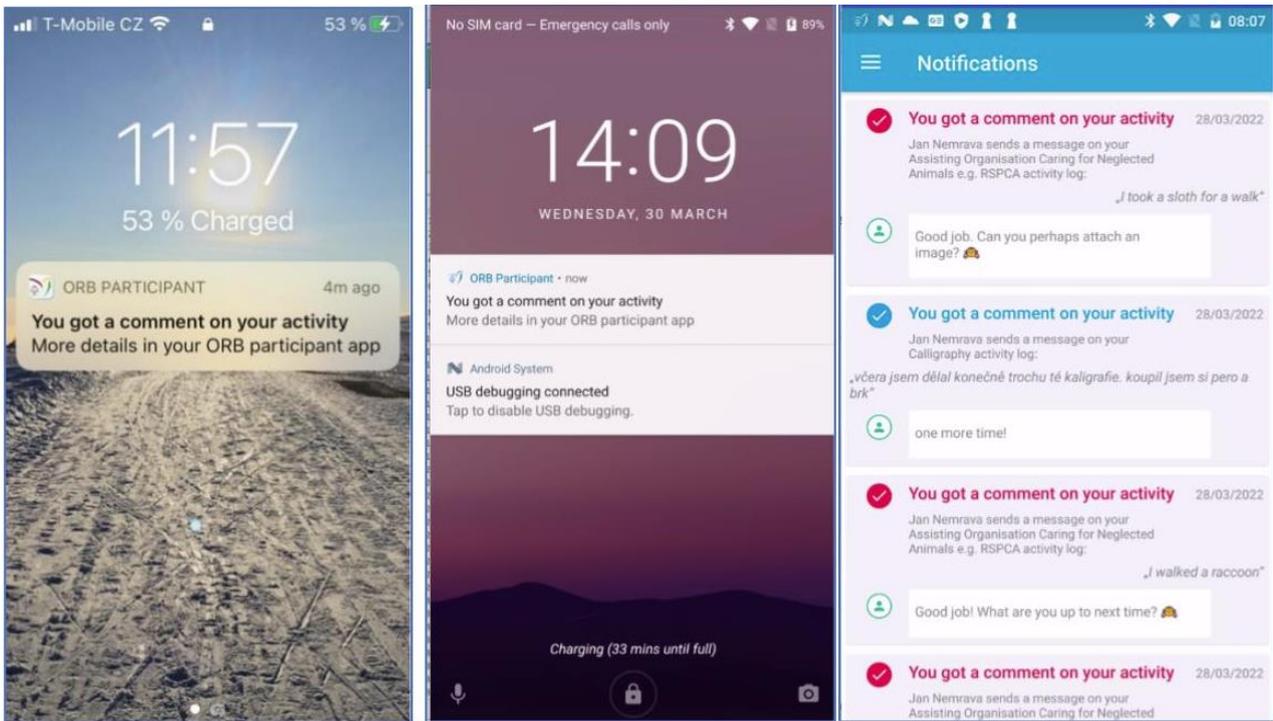
You can view all messages sent to a specific Participant or from a specific Award Leader in their *History Log* tab



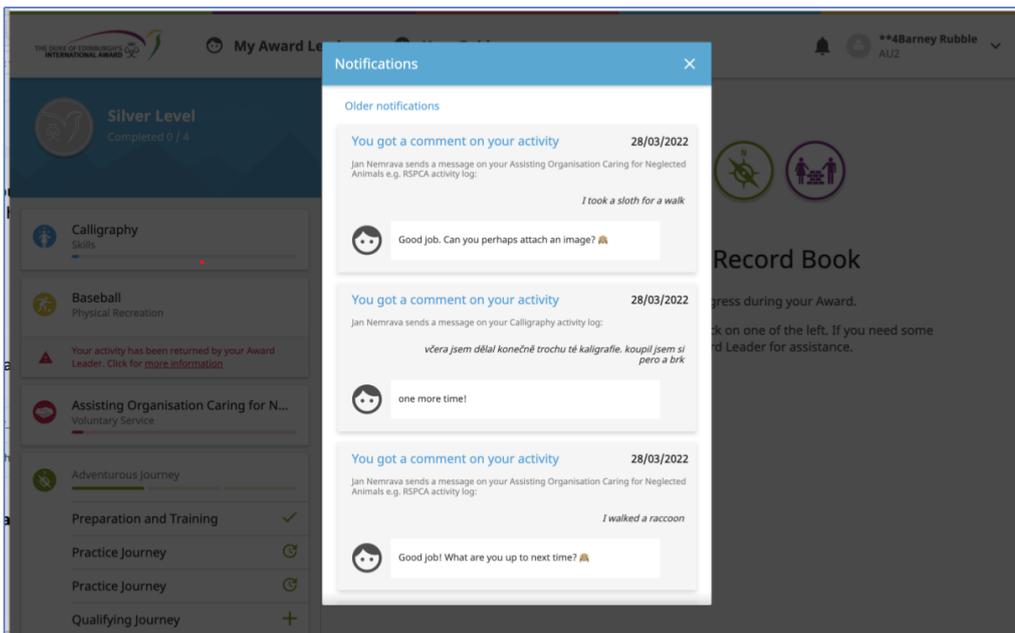
Participants Message view

Once the message has been sent the participant receives a push notification on their mobile phone or tablet (if they use the Participant app and have allowed notifications).

Participants using only the website will have a notification alert when they next log in to onlinerecordbook.org



When the participant is using the web browser version of the ORB it will be received as a *Notification*



9. Navigation and Timesaving Tips

There are several features within the ORB designed to help you save time and in navigating around the site.

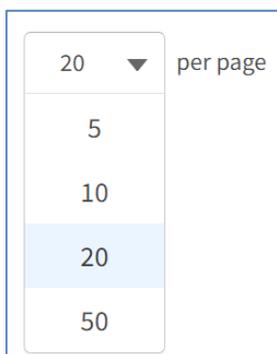
The screenshot displays the ORB interface with several key features highlighted by red dashed boxes and callout boxes:

- 1. Number of results per page:** A dropdown menu showing '20 per page'.
- 2. Copy email address:** A link icon (chain link) next to the email address 'Orb.Test201021@intaward.org'.
- 3. Mini Award icon:** A set of three colored squares (gold, silver, bronze) representing award levels.

The interface also includes tabs for 'My Participants' and 'All Participants', filter options for Level, Search, Participant Status, Award State, and Award Leader, and a Bulk action dropdown.

	ID	First Name	Last Name	Email	Levels	Last log added	A
<input type="checkbox"/>	PN000780383	Barney	Rubble	barney.rubbleORBTEST@intaward.org		18 days ago	P
<input type="checkbox"/>	PN001316549	Fred	Flintstone	Orb.Test201021@intaward.org		16 days ago	P

1. Number of results per page



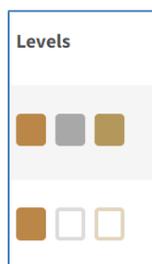
When viewing lists in the ORB , you can select the number of results shown per page. The default is 20 but 50 can be selected for larger Award Centres and where internet speed is not an issue. Lower numbers can be selected if you require the results to be shown on the page more quickly (such as where internet speeds are a problem).

2. Copy email address



Clicking the link icon will copy the email address, enabling you to paste it in an email.

3. Mini Award icon



This shows the Awards that a participant has completed, has registered for, or has in progress. The example on the left shows a participant with three Awards and a participant with Bronze. Clicking on the relevant coloured box will take you straight to the Award details.

10. Updates to the Online Record Book

The ORB is updated on a regular basis, through four main updates each year (along with the occasional minor update). Updates often mean new features are introduced or existing functionality is altered to improve the experience of using the site. Updates that impact you should be communicated in advance by your Award Office. Users of the Award Community will also see upcoming changes updated in the Award Community Online Record Book group.