Online Record Book

National Award Operator User Guide
The Duke of Edinburgh's International Award Foundation

02/04/2018
Version: 1.7

Version control

Version	Date	Author	Notes
1.0	05/05/2017	Daniela Pozzi	First version
1.2	20/06/2017	Daniela Pozzi	Content Update
1.3	08/08/2017	Daniela Pozzi	Content Update
1.4	30/08/2017	Daniela Pozzi	Content Update
1.5.1	07/12/2017	Marisa English	Content Update
1.6	28/01/2018	Marisa English	Content Update
1.7	02/04/2018	Marisa English	Content Update

Summary of changes

V1.2: Screen shots updates to reflect the system; clarification about Localisation Files and Customisation tabs, guidance about password change;
Instructions about how to modify an Award Unit's Authorising Contact and Coordinator inserted;
Guidance about adding contacts to Award Units inserted and ORB User guides explanation inserted.

V1.3: Screen shots updates to reflect the system; information on how to change a participant's Award Level inserted; Adventurous Journey overview and management tasks inserted.

V1.4: Screenshot updates to reflect the system; inserted instructions how to resend a confirmation email to an Award Leader; how to send a reset email and delete any related contact; explanation on how to download a participant's Award Summary; transfer participants in bulk to a new Award Leader and set bespoke profile questions inserted; description of the logs tab inserted

V1.5.1: Screenshot updates to reflect the system; instructions on deleting an Award Unit; updated information on verifying an Award Leaders email address; instructions on deleting an Award Leader; updated information on the FAQ document

V1.6: Screenshot updates to reflect the system; instructions on moving an Award Unit to a different Sub Operating / Operating Authority; reviewing Participant registrations; Updated information on deleting an Award Leader account to facilitate merging of two accounts;

V1.7: Screenshot updates to reflect the system

Contents

Introduction

The Online Record Book (ORB) is a web platform that allows participants to record their activities and submit their Awards. It also allows Award Leaders to monitor participants' progress and approve submitted Awards.

This document has been written for Award Operators who are working with The Duke of Edinburgh's International Award, and managing Award Units. It provides detailed, step-by-step guidance on how to use the new ORB web interface.

The Online Record Book can be accessed via https://www.onlinerecordbook.org
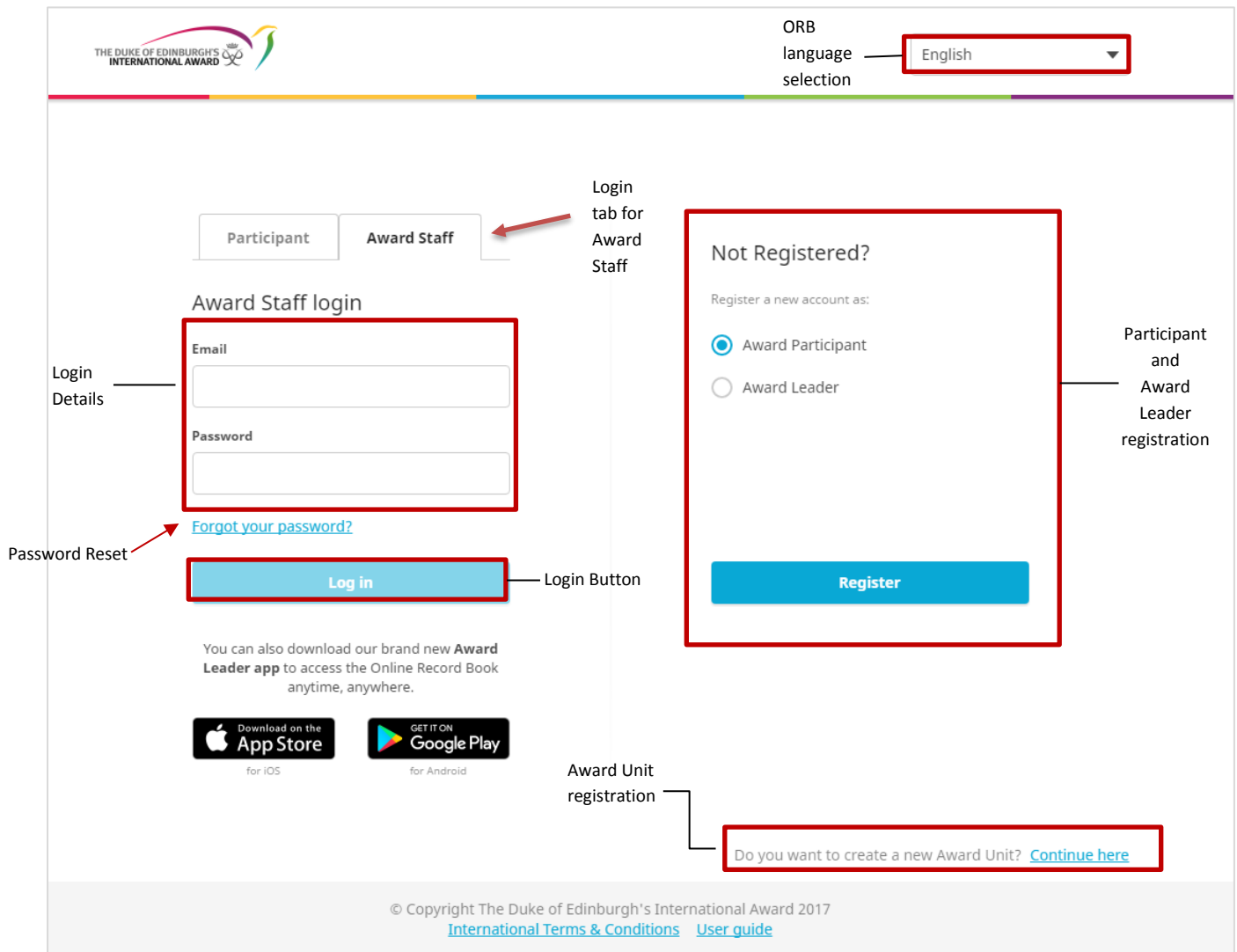
Supported Browsers and Technical Information

The ORB can be accessed using the latest versions of the following browsers:

- Google Chrome
- Safari
- Firefox
- Microsoft Explorer
- Edge

Getting Started

Overview Login Page

1. Requesting your ORB account

To access the ORB, you must first request an account from your main support contact, providing them with your personal details, including your email address which will also be the username you will use to log in to the system.

After your main support contact has approved your request for an ORB account, you will receive an email notifying you that your account has been created along with a URL to set your password.

Once your password is setup, you are able to log in to the ORB inserting your credentials in the 'Login' as displayed above.

2.   Forgot your password?

If at any point you need to reset your password, you can select the option 'Forgot your password?' from the login page.

Insert you email address in the dialog box and press 'Send'. An email with a link to reset your password will be sent to your mailbox.

Landing Page Overview

To log on to the Online Record Book click on 'Award Staff' tab on the login page, insert your login details and click 'Login'

Once you log on to the ORB, the list of registrations waiting your approval will be shown as a landing page.

- **Reviewing and approving an Award Unit registration**

1. From the [Registrations] page, select [Award Units] tab, to view all new Award Units awaiting registration approval
2. Review the Award Unit's application details clicking on the Award Unit's name
3. Click on 'approve' or 'reject', as necessary
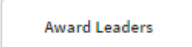

Note: Once the Award Unit has been approved and created, the Nominated Award Leader will receive an email verification to verify the email address registered. The nominated Award Leader's account also needs to be approved from the tab 'Award Leaders'.

N.B: If the Award Unit is registered under a National Award Operator (NAO), its registration will be displayed under the NAO's list of Award Unit registrations to be approved.

If the Award Unit is registered under an Operating Authority (OA), its registration will be displayed under the Operating Authority's list of Award Unit registrations to be approved.

If the Award Unit registered below a Sub-Operating Authority (SOA), its registration will be displayed under the Sub-Operating Authority's list of Award Unit registrations to be approved.

- **Reviewing and approving new Award Leaders**

1. From the [Registrations] page, select the tab [Award Leaders] to view the list of Award Leader's waiting for registration approval
   - A ⏱ will be displayed, if the Award Leader's email address hasn't been yet verified.
   - A ✓ will be displayed when the email address has been confirmed.
2. Review the Award Leader's application details clicking on the Award Leader's ID
3. Click on 'Approve' or 'Delete', as necessary

In the instance that the Award Leader hasn't received the verification email, it can be resent by clicking on [Send confirmation email again] option available within the Award Leader's details.

Note: In order to approve new registrations via the Online Record Book, Award Leaders must have confirmed their email address beforehand. This can also be overridden by the NAO at this point.

- **Review and/or approve any requests for Award sign-off**

Once an Award has been approved by the Award Leader, it is ready for Award office sign-off.

1. From the menu select 🏅 Awards
2. Click on the participant's ID you would like to assess
3. Review personal details from the tab 'Detail'
4. Click on the tab nominated as the participant's Award level
5. Review sections and logs moving among the Section tabs
6. From the tab 'Award Detail', click on Approve or Revise, as necessary

N.B: If the participant belongs to an Award Unit registered under a National Award Operator (NAO), their Award will be displayed under the NAO's list of Awards to be signed off.

If the participant belongs to an Award Unit registered under an Operating Authority (OA), their Award will be displayed under the Operating Authority's list of Awards to be signed off.

If the participant belongs to an Award Unit registered under a Sub-Operating Authority (SOA), their Award will be displayed under the Sub-Operating Authority's list of Awards to be signed off.

- **Reviewing and / or approving participant registrations**

In order to be able to approve new registrations via the Online Record Book, participants need to have:
- confirmed their email address,
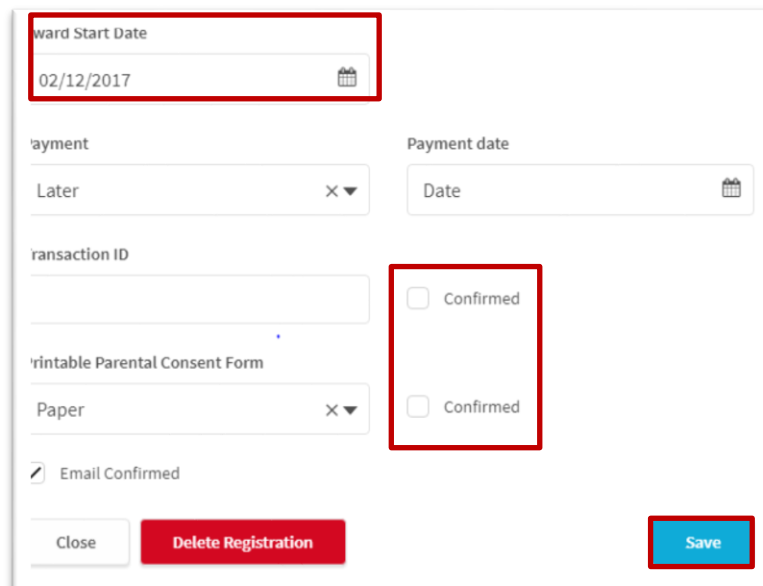- received parental/guardian approval (if required)

- be marked as paid (or either confirmed that payment will be made later, or that it is not required).

1. From the To-Do List select "Registration"
2. Review the details displayed

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

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

3. Click on **Confirm** .
4. Please note, if parental consent has been delivered via email and the email address has already been confirmed by the participant the boxes will be automatically ticket.
5. From the pop up box modify the necessary details and ✔ as confirmed.

6. To resend any the parental consent email click on [Resend parental consent]

    This option will only be visible if the delivery confirmed box is left unchecked

7. Click on 'Save' to save the details

Note: Award start date is set as the registration date by default.

If the participant started the Award programme at an earlier date, it can be amended at this point

If you do not recognise the registration, or it is not valid you can delete it, clicking on [Delete registration]

8. Click on 'Approve' to finish the registration approval.

ID	First Name	Last Name	Registration Date	Level	Email Confirmation	Parent Approval	Payment	Review	Action
PN000000132	Paloma	Ford	14/06/2017	BRONZE	✓	Not required ✓	Paid ✓	Confirm	Approve

9. The participant will be notified immediately via the Online Record Book

Note: 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.

Participants are not able to save activity logs set before their Award start date.

- **Browsing list of participants**

You can browse the list of participants registered to your National office:

1. Select ⚖ Participants from the side menu
2. The list of participants will be displayed *(a)*
3. User the filter or search bar to search for a specific participant (optional)
4. Click on the participant's ID to view their details

(a) List of participants

ID	First Name	Last Name	Email	Levels	Award Unit	Status
PN000000469	SonaS	aus-b0	sna.nox+aus-b0@gmail.com	BRONZE SILVER GOLD	Albany Park Sailing Centre	Active Setup
PN000000468	Pebbles	Flinstone	iva.r.krastanova@gmail.com	BRONZE SILVER GOLD	UK Award Unit 7	Active Setup
PN000000461	jan	nemrava	jan.nemrava+55@inloop.eu	BRONZE SILVER GOLD	Albany Park Sailing Centre	Active Registration Assignment
PN000000448	Dridina	Part	dripart@gmail.com	BRONZE SILVER GOLD	UK Award Unit 18	Active Setup
PN000000433	SonaS	rg1	sna.nox+rg1@gmail.com	BRONZE SILVER GOLD	UK Award Unit 7	Active Registration Approval
PN000000431	rfe	erf	vladimir.smatanik+1@inloop.eu	BRONZE SILVER GOLD	Albany Park Sailing Centre	Active Registration Assignment
PN000000426	s	a	cimentmaltu+test@gmail.com	BRONZE SILVER GOLD	Albany Park Sailing Centre	Active In Progress
PN000000423	Nicholas	hudson	nick001@gmail.com	BRONZE SILVER GOLD	Albany Park Sailing Centre	Active Setup

Filters and Search bar — Filter

- **Moving a participant to another Award Unit**

You can move participants among Award Units within your National office.

1. From the list of participants in your NAO select the participant you would like to move to another Unit
2. From the Award Unit section, within the 'Detail' tab, click on 'Change' *(a)*

3. From the pop-up select the new Award Unit and the Leader you would like the participant to be assigned to
4. Click on 'Change' to move the participant's account to the new Unit
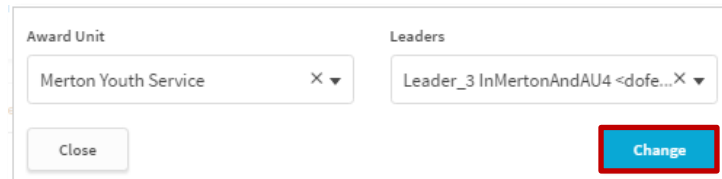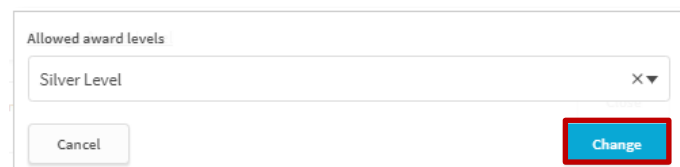
(a)   Award Unit section

(b) Pop-up

- **Change a participant's Award Level**

If a participant decides to change their Award Level throughout the Award, NAO staff can perform this action via the ORB. Hours and time requirements will be automatically recalculated by the system. To change a participant's Award Level:

1. Navigate to the participant's Award Section.
2. Within the 'Award Detail tab' click on
3. From the pop-up select 'Change Award Level'
4. From the drop down select the Award Level of choice and click on 'Change' to confirm your choice

Pop-up displayed

- **Generating a participant's Award Summary report**

You can download a PDF containing all of your participant's Award information such as activities and logs.

To download a participant's Summary report:

1. Navigate to your participant's Award
2. From the tab 'Award detail' click on
3. Click on and confirm your choice
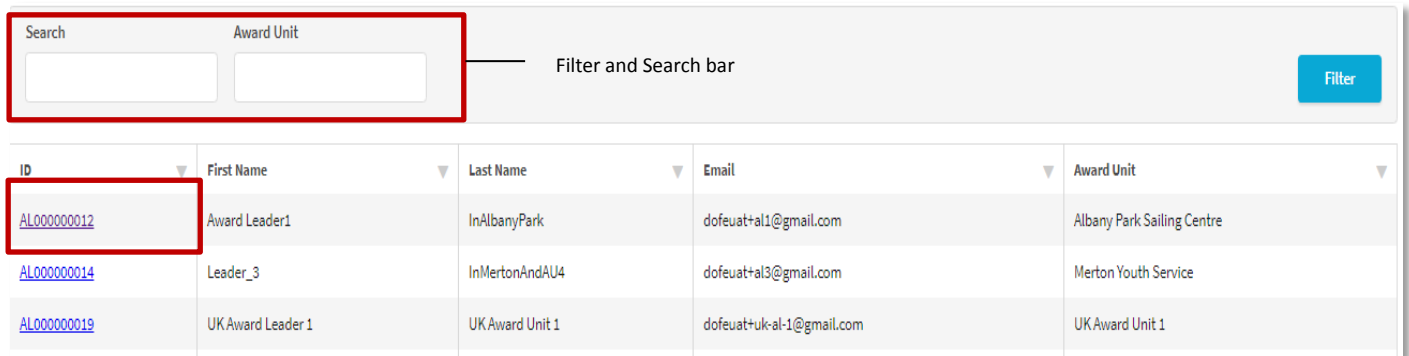4. A PDF file will be automatically downloaded to save

- **Browsing list of Award Leaders**

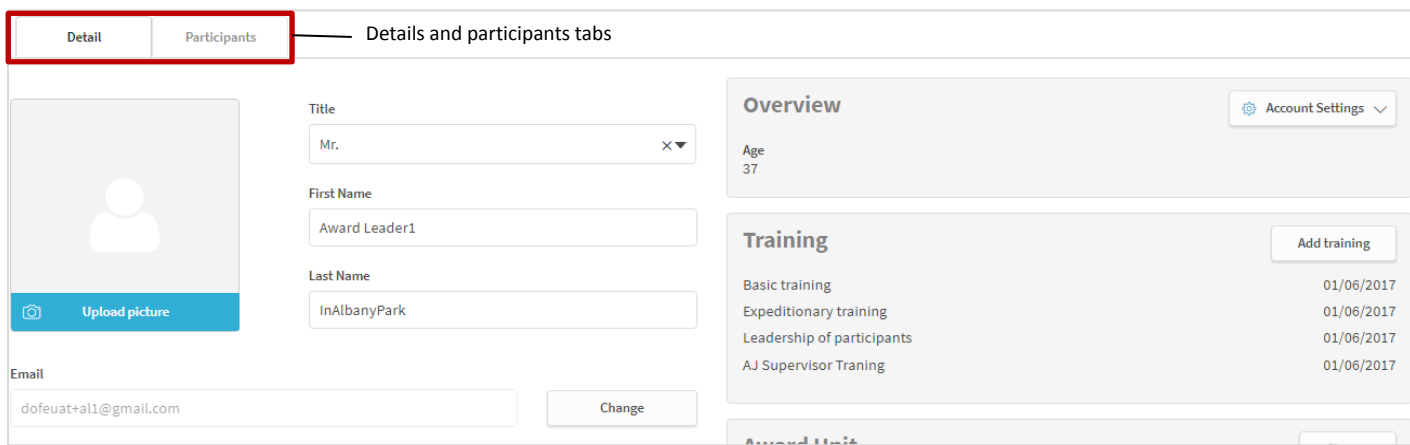You can browse the list of Award Leaders registered to your National office:
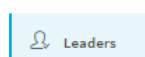
1. Select _____ from the side menu
2. The list of Award Leaders will be displayed *(a)*
3. Use the search function to search for a specific Award Leader (optional)
4. Click on the Award Leader's ID to see their personal details and the participants assigned to them

(a)   *List of Award Leaders*

Filter and Search bar

ID	First Name	Last Name	Email	Award Unit
AL000000012	Award Leader1	InAlbanyPark	dofeuat+al1@gmail.com	Albany Park Sailing Centre
AL000000014	Leader_3	InMertonAndAU4	dofeuat+al3@gmail.com	Merton Youth Service
AL000000019	UK Award Leader 1	UK Award Unit 1	dofeuat+uk-al-1@gmail.com	UK Award Unit 1

(b)   *Award Leader's details*

Details and participants tabs

- **Transfer all participants from one Award Leader to another**

You can transfer all participants linked to one Award Leader to another Award Leader in the same Unit.

To transfer participants in bulk:

1. Navigate to the Award Leader's record you would like to transfer all participants from

2. Click on ⚙ Account Settings ⌄ and select 'Transfer participants' from the drop down

3. Select the Award Leader you would like to transfer all participants to from the drop down displayed in the pop- up

4. Click on 'Change' to finish the transfer

Pop-up displayed

Are you sure?

All participants will be transfered to a new Award Leader

Leaders

John Casey <testaward00+222@gmail.com>

Close   **Change**

- **Add training records on behalf the Award Leader**

You can add training records on behalf of an Award Leader:

1. Navigate to the Award Leader's records
2. From the training section displayed in the Award Leader's details tab, press 'Add training' *(a)*
3. Insert training name and date of training from the pop-up displayed *(b)*
4. Click on 'Add' to add the information to the Award Leader's profile

(a)   Training section

Training   Add training

Basic training
Expeditionary training
Leadership of participants

(b) Pop-up displayed

Training Name   Date

AJ Supervisor Traning   01/04/2017

Close   **Add**

- **Move an Award Leader to another Unit**

You can move Award Leaders among Award Units, within your National office:

1. From the list of Award Leaders in your NAO select the user you would like to move to another Unit
2. From the Award Unit section, within the 'Detail' tab, click on 'Change' *(a)*
3. From the pop-up select the new Award Unit you would like to assign the Award Leader to
4. Click on 'Change' to move the account to the new Unit

(b)   Award Unit section

(b) Pop-up

N.B.: To be able to transfer the Award Leader to a new Award Unit, all participants previously assigned to this Award Leader must have been re-assigned to a new Award Leader within the current Unit.

- **Deleting an Award Leader**

Award Leaders can be deleted when there is not attached data to them so all participants need to be moved to another Award Leader first. This would also be the process when requiring to merge two Award Leader accounts. Once the data has been moved from one Award Leader Account, it can then be deleted.

The Leader can then be deleted by:

1. Navigating to the Award Leader [Detail] tab
2. Select 'Delete Account' from the overview section and the Account Settings dropdown menu
3. Then select a reason for the deletion and click 'Remove'
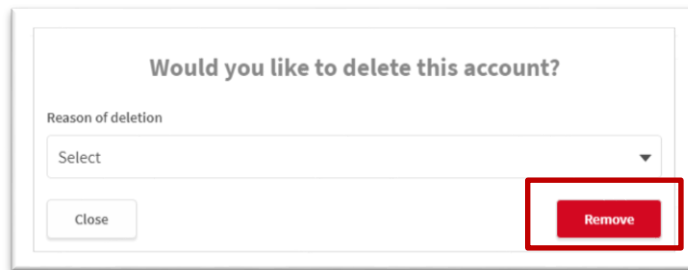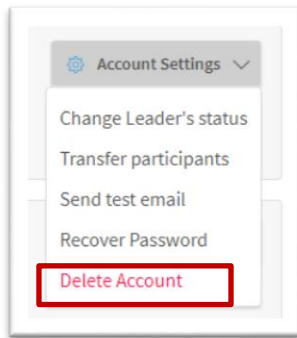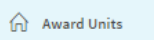
- **Browsing Award Units**

You can browse the list of Award Units registered to your National office:

1. Select the option [Award Units] from the side menu bar
2. The list of Award Units will be displayed
3. Use the search function to search for a specific Award Unit (optional)

4. Click on the Award Unit's ID to see all tabs displaying specific details such as:
   - Award Unit's general details (e.g: Name, shipping and billing address, related contacts, etc)
   - List of participants registered to the Unit
   - List of Award Leaders registered to the Unit
   - Participant and Award Leader registrations awaiting approval
5. You are able to modify any of the details displayed on behalf of Award Leaders

List of Award Units

Award Unit details

Award Unit's specific tabs

- **Editing an Award Unit's Authorising contact / Award Coordinator**

To edit a specific Award Unit's authorising contact or Award coordinator:

1. Navigate to the Award Unit you would like to modify
2. Select the tab 'Office Details' within the 'Details' tab
3. Click on the change button displayed where the authorising contact or coordinator contact's details are displayed
4. Select the new contact from the drop-down list displayed in the pop-up box
5. Click on 'Set' to set the new authorising contact or coordinator

Authorising contact / coordinator details

Pop-up displayed

- Related Contacts List Overview

In the Contacts tab, you can view the list of contacts within the Award Unit.

To view more information about the contacts listed, just click on the contact's ID.

- **Adding new contacts to an Award Unit**

You can add new contacts to an Award Unit:

1. Navigate to the Award Unit you would like add the contact to
2. Click on the tab | Related Contacts | within | Detail | tab
1. Select the option | New Contact |
2. Fill all contact information necessary from the pop-up displayed *(a)*
3. Click on | Create | to finish creating your new contact

(a)   Contact information
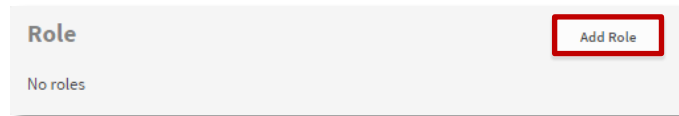
1. The new contact details page will be displayed
2. Click on | Add Role | within the 'Role' section *(b)*
3. From the 'Role' dropdown displayed on the pop-up menu select the correct role to the newly created contact *(c)*
4. Click on 'Add' to add the role to the new contact *(c)*

(b) Role section

(c) Add role pop-up

The new user will receive an email notification with link to verify the email address and set their password.

- **Moving an Award Unit to a different Sub/Operating Authority**

If you need to move an Award Unit to a different Award Authority then this can be done by:

1. Browsing to the Unit overview and selecting the organisation settings
2. Select Move Award Unit from the dropdown menu
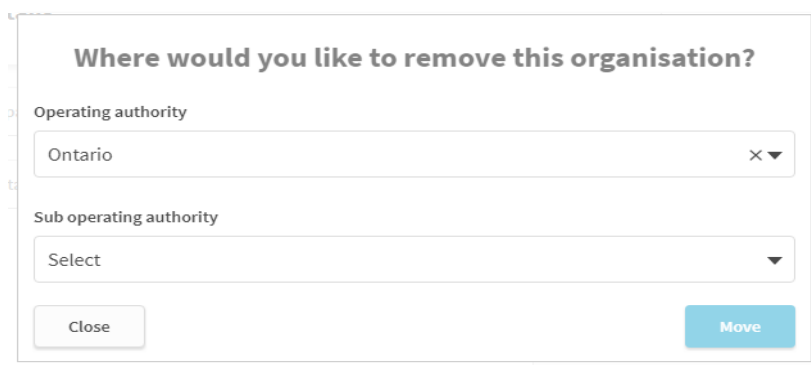
The following pop up will appear. Here you can select which Operating Authority and / or Sub Operating Authority you would like to move your Unit to. Once selected click 'Move'

- **Deleting an Award Unit**

If you have an Award Unit that requires deletion then you must first empty the unit by:

1. Moving all Participants to another Award Unit or inactivating all Participants without any activity
2. Moving all Award Leaders to another unit inactivating all Leaders without any activity
3. Deleting all registrations

Once those steps have been completed, the Award Unit can be deleted by navigating to the Award Unit and on the Office Details tab select 'Remove organisation' from the Organisation settings dropdown menu
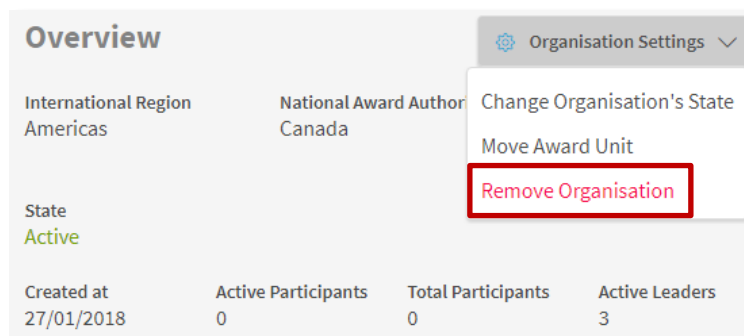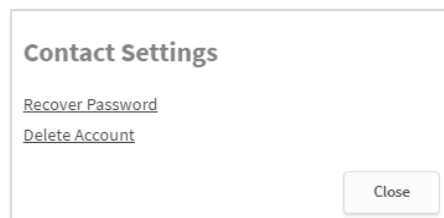

- **Award Staff password reset /account deletion**

You can reset a related contact's password or delete their account via the [Contact Settings] tab.

1. Navigate to the related contact's profile
2. Click on [Contact Settings] tab
3. From the pop – up choose the correct option
4. Confirm your choice when prompted

Pop-up displayed
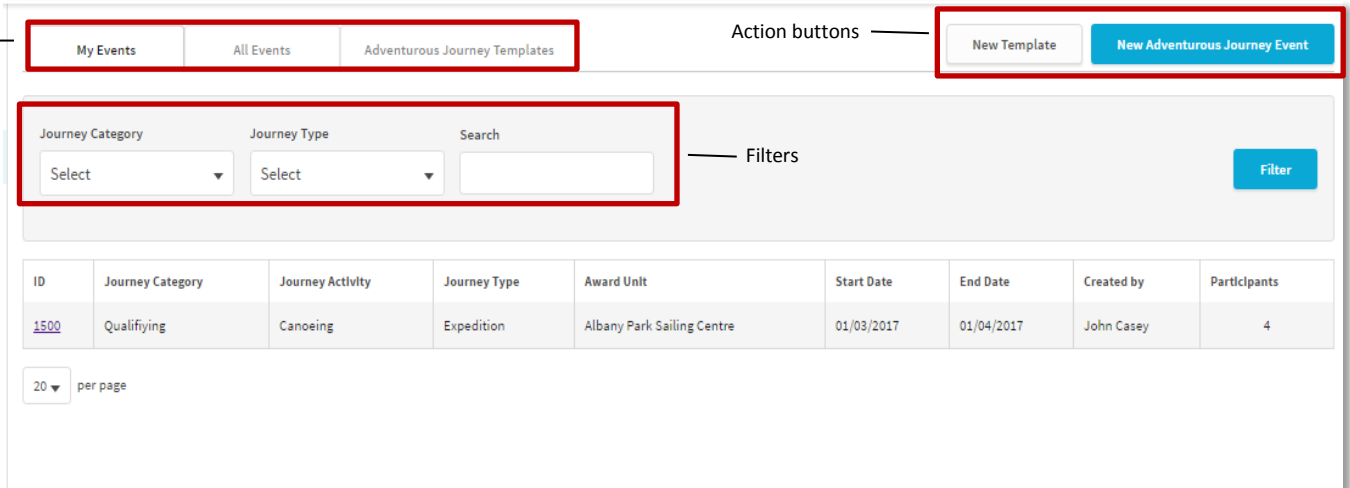
Adventurous Journey Overview

By using the Online Record Book, NAO staff will be able to:

- Create and manage new Adventurous Journey Events
- Create and manage new Adventurous Journey Libraries
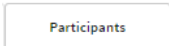
- **Creating a new Adventurous Journey Event**

To create a new Adventurous Journey Event:

1. Select from the menu
2. Select "New Adventurous Journey Event"
3. Add all details of Journey
4. Press 'Save' to save your changes

- **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 modify
   - Journeys created by you will be displayed under 'My Events tab'
   - Journeys created by contacts in your Unit will be displayed under 'All Events'
2. Click on the Event ID
3. Click on the tab [Participants]
4. Click on the button [Manage Participants] displayed on the right
5. In the pop-up type the name of the participants you would like to add and click on their names
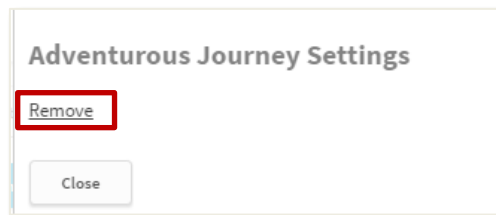6. Click 'Set participants' to save your changes

You can choose to remove participants selecting the option 'Remove', displayed in the pop-up.

Once you have linked participants to an Adventurous Journey Event, they will be notified and the Event details will be displayed on their profile.
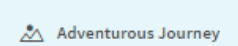
- **Deleting an Adventurous Journey Event**

To delete an Adventurous Journey:

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

Adventurous Journey Settings

Remove

Close

- **Creating a new Adventurous Journey template**

To create a new Adventurous Journey Event:

1. Select ⛰ Adventurous Journey from the menu
2. Select "New Template"
3. Fill all details of your template
4. Press 'Save' to save your changes

All templates are found with the Adventurous Journey Templates tab and can be used when creating a new event:

1. Select ⛰ Adventurous Journey from the menu
2. Select "New Adventurous Journey Event"
3. Click on the option **Select Template** displayed at the top of the screen
4. In the pop-up displayed click on the template you would like to use from the list of templates *(a)*
5. The template will automatically populate your new Event

(a) Pop-up displayed

- **Delete an Adventurous Journey Template**

To delete an Adventurous Journey template:

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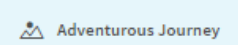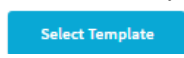3. From the pop-up click on 'Remove' and confirm your choice
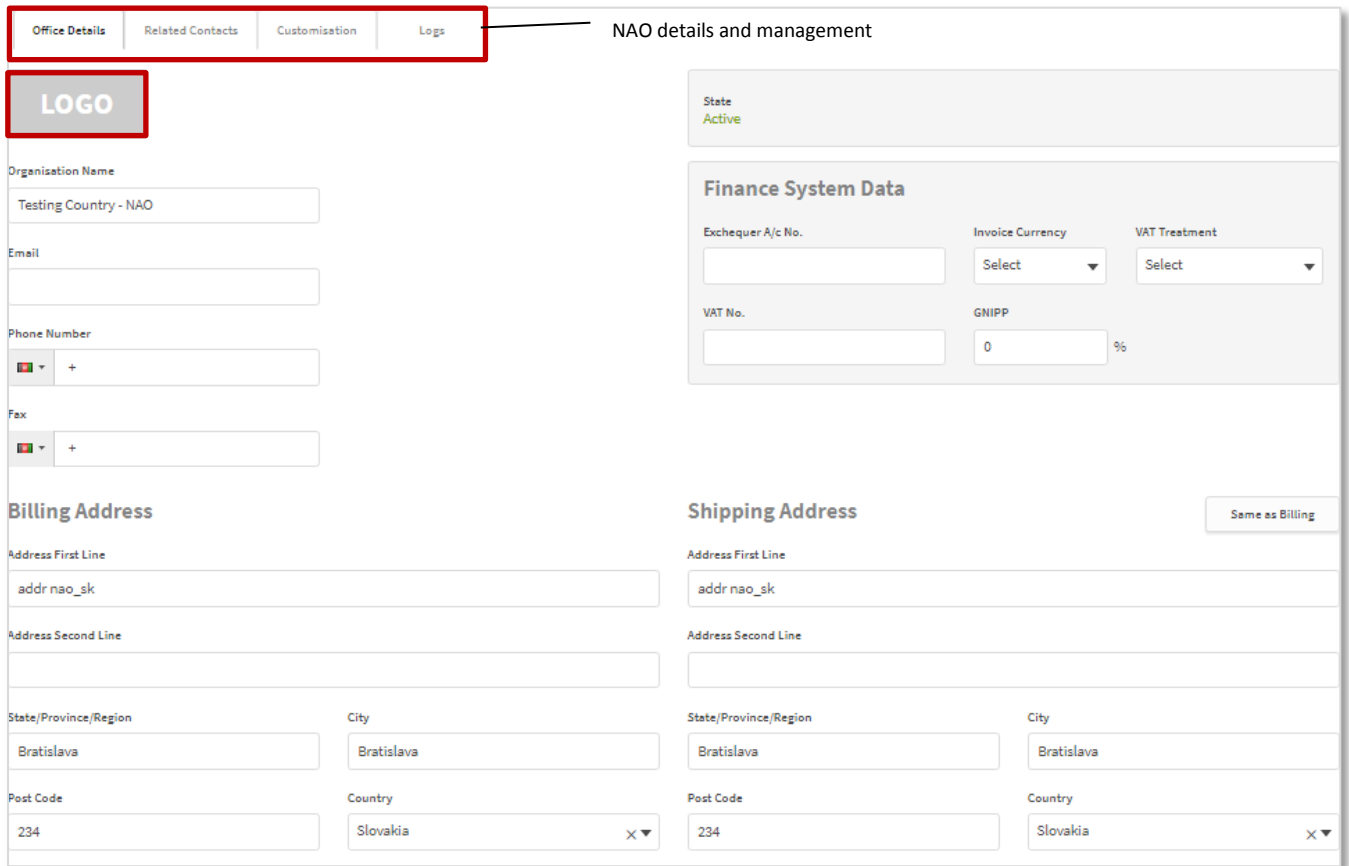

Managing your Award Office

Within the Online Record Book you can manage your Award office and change its details by clicking on

 from the side menu.

My Office Page Overview

NAO details and management

- **Editing your organisation details/logo**

1. To edit any of your organisation details click on the fields available and overwrite the information displayed

2. Press [Save] displayed at the bottom at the page to save your changes

3. To change your logo click on 'Logo' on the 'Office details' page

4. Select your logo when prompted

5. Click 'Add' and [Save] displayed at the bottom at the page to save your newly added logo.

6. To remove your logo hover over the added logo

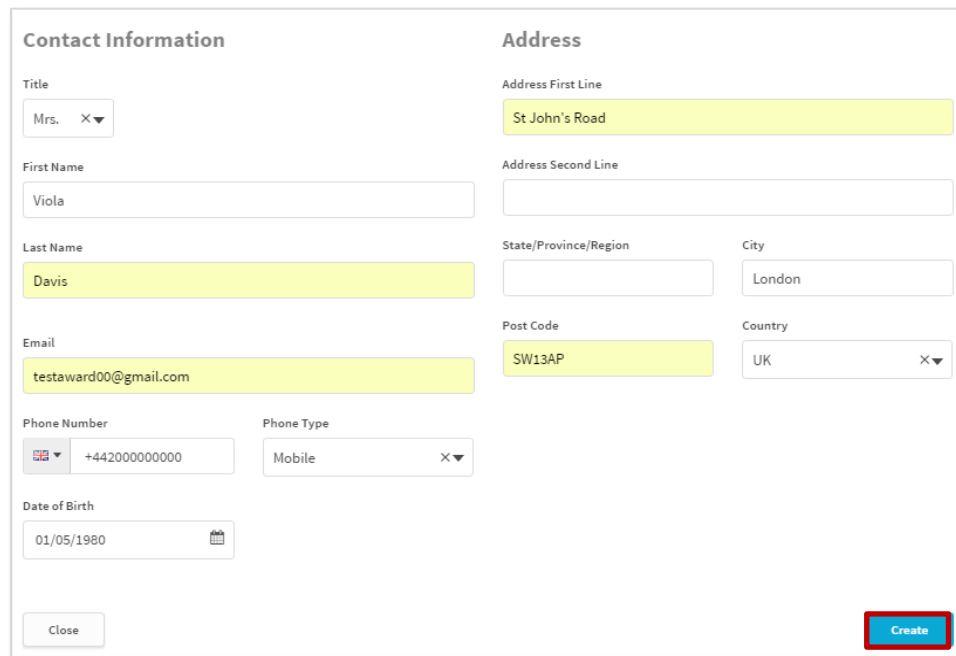7. Click on 'Remove Logo'

8. Click on [Save] to save your changes

- **Adding new contacts**

You can add new contacts within your NAO:

4. Click on the tab [Related Contacts] within [⚙ My Office]

5. Select the option **New Contact**

6. Fill all contact information necessary from the pop-up displayed *(a)*

7. Click on **Create** to finish creating your new contact

(b)   Contact information

Contact Information

Title

Mrs.   ×▼

First Name

Viola

Last Name

Davis

Email

testaward00@gmail.com

Phone Number   **Phone Type**

🇬🇧▼ +442000000000   Mobile   ×▼

Date of Birth

01/05/1980 📅
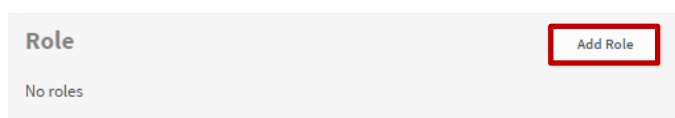
Address

Address First Line

St John's Road

Address Second Line

State/Province/Region   **City**

                                 London

Post Code   **Country**

SW13AP   UK   ×▼

Close   Create
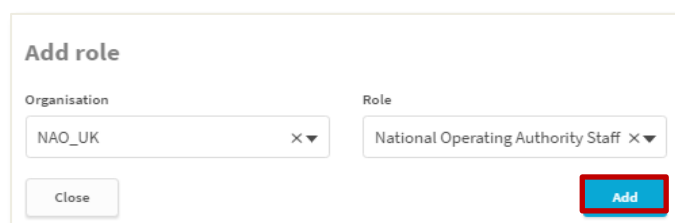
8. The new contact details page will be displayed

9. Click on **Add Role** within the 'Role' section *(b)*

10. From the 'Organisation' dropdown displayed on the pop-up menu select the organisation you wish to create a contact for *(c)*

11. Select the correct role to the newly created contact *(c)*

12. Click on 'Add' to add the role to the new contact *(c)*

(b) Role section

Role   Add Role

No roles

(c) Add role pop-up

Add role

Organisation   **Role**

NAO_UK   ×▼   National Operating Authority Staff ×▼

Close   Add

- **Profile questions**

National Award Operators will be able to set bespoke questions for participants during the registration process.

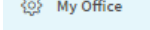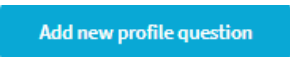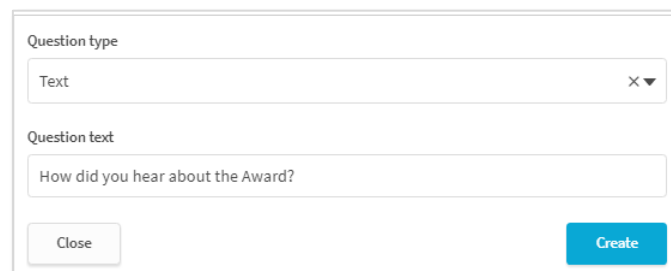All profile questions that can be customised by the NAO will be displayed in the tab 'Customisation' within
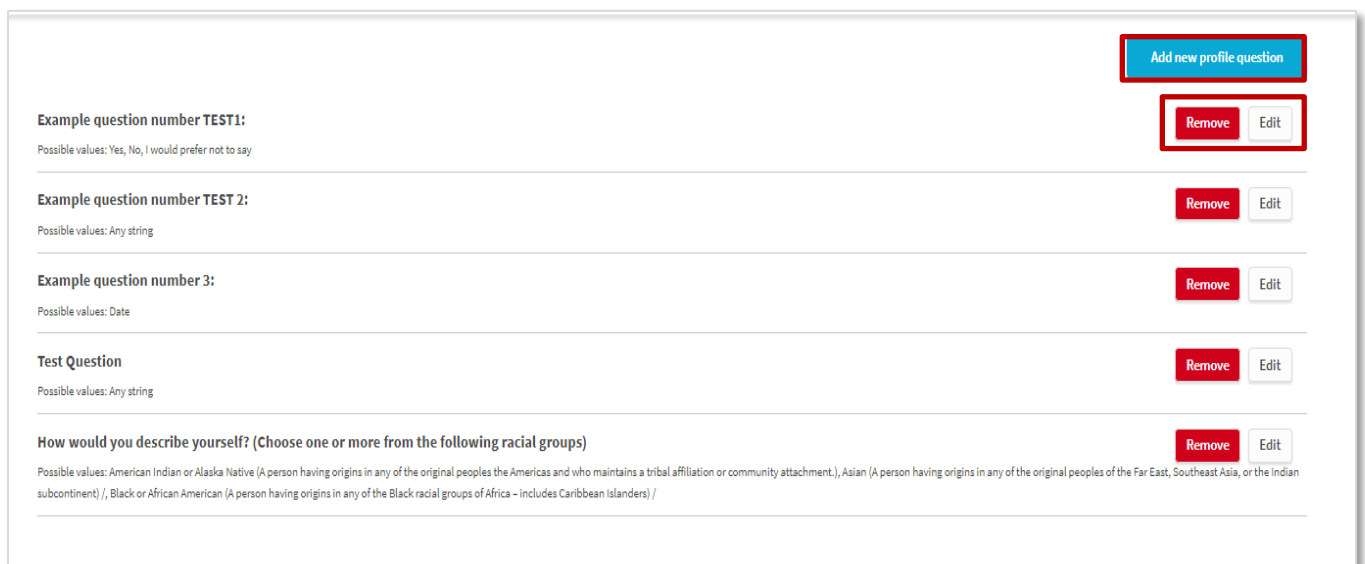
⚙ My Office
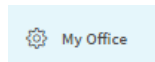
To set profile questions for your NAO:

1. Navigate to the tab 'Customisation' within ⚙ My Office
2. Click on Profile questions
3. Click on **Add new profile question**
4. Select the question type from the drop down list appearing on the pop-up
5. Type the question into the 'Question text' field
6. Press 'Create' to finish creating your profile question

Example question

Question type

| Text | ✕ ▼ |

Question text

How did you hear about the Award?

Close   **Create**

Example list of questions set

Add new profile question

Example question number TEST1:
Possible values: Yes, No, I would prefer not to say
Remove Edit

Example question number TEST 2:
Possible values: Any string
Remove Edit

Example question number 3:
Possible values: Date
Remove Edit

Test Question
Possible values: Any string
Remove Edit

How would you describe yourself? (Choose one or more from the following racial groups)
Possible values: American Indian or Alaska Native (A person having origins in any of the original peoples the Americas and who maintains a tribal affiliation or community attachment.), Asian (A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent) /, Black or African American (A person having origins in any of the Black racial groups of Africa – includes Caribbean Islanders) /
Remove Edit

To remove or edit any of the questions click on the 'Remove' or 'Edit' buttons displayed.

- **Customisation**

National Award Operators will be able to set bespoke parameters applicable at national level (e.g. Minimum age for participant registration for BRONZE LEVEL; minimum age for the participant registration without the need for parental/guardian consent; Terms and conditions and more)

All parameters that can be customised by the NAO will be displayed in the tab 'Customisation' within
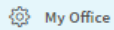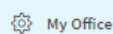
⚙ My Office

Please contact your Regional Office for more information on how to set your national parameters.

- **Logs**

The tab logs will display all actions taken place within your NAO, such as new Award Unit and Award Leader's registration and approval dates.
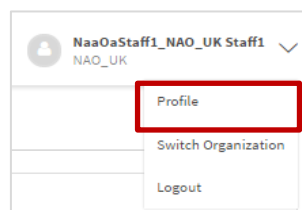
The tab 'Logs' is available within the option ⚙ My Office

My Profile Overview

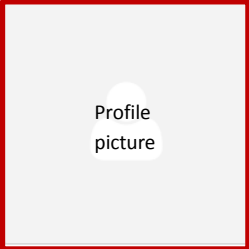You can change your details at any stage by updating your profile on the ORB as well as add a new profile picture.

You can view your profile by clicking on your name on the top right corner and select the 'Profile' option.

1. To make any changes to your personal details as well as language settings, simply click on any of the fields displayed and overwrite the information
2. Press 'Save' to save your changes
3. To change your profile picture click on the profile picture
4. Select a picture from your local disk and crop/reposition, as necessary
5. Click on 'Save' to save your changes

To reset your personal password:

1. Select the option **Change password**
2. In the pop-up displayed insert current and new password
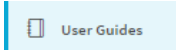3. Click on 'Change' to change your password

To update your language settings:

1. Navigate to your profile page
2. Select your language from the drop down 'Language Settings'
3. Click on [Save] to save your settings

Online Record Book User Guides

Online Record Book user guides can be referred to at any time so that you get the most out of the new system.

You can download the user guides and the FAQ document by clicking on [User Guides] from the side menu. The list of guides available will be displayed. You can then click on the different titles for download.

User Guides

User app guide - Award Leader

User web guide - Award Leader

User web guide - Participant

User app guide - Participant

User web guide - NAO

Frequently Asked Questions (FAQs)