

ORB Quick Guide: *Categorising Participants using Labels*

Labelling for Participants on the Online Record Book can be used to 'tag' or identify sub-groups within an Award Centre, such as age or year groups or other information that is helpful to categorise Participants for easier management. Once labels are created and applied to relevant Participants, it can be used for Participant searches and ORB list sorting.

For example, a label could be created to identify those Participants who are this year's intake for Bronze. Once the label is applied to the relevant Participants, it can be used to sort the Participant list to bring only the Bronze Participants for this year into the search results list. This list can also be exported into Excel. Labels are also included in several reports that can be generated by the ORB.

This guide on labels will show you how to create, apply and view labels.

1. Creating Labels

i. Creating a label to categorise Participants can be done through *My Organisation*. Select the *Labels* tab, and then the blue *New Label* button.

THE DUST OF EDBRURGHTS	My Organiza	tion - Labels			Search	۹
i≡ My To Do List 24	Organisation	Details Contacts Payment	Labels			
i≡ To Do List 49		_				New Label
B Participants						
பி, Leaders	Search					Filter
Adventurous Journey						Number of records: 1
Guides and Policies						
-	ID	Name	Description	Category	Action	
E Reports	471	2023 Participants	2023 Participants	PERSON	Edit Delete	
My Organisation						
Message Center						

- ii. Enter the information and select the blue 'Create' button, noting:
 - 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).
 - The category section currently only has 'Person' (relating to Participants). The category section is set up to support the future development of labels.

Create new label				
iame				
escription				
ategory				
PERSON	*			
			_	

iii. Once created, the label with display in the list view on the labels page, as the 2023 Participants label does on the top screenshot above. These can be edited and deleted if required.

2. Assigning labels

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

i. In the To Do list (or My To Do list), in the Registration tab.

Here, labels can be assigned as a bulk action before registrations are accepted. Once you have selected 'Assign Labels' from the Bulk operations drop-down list, tick the boxes of the Participants you wish to apply the label to (to the left of the Participant ID). This will show against them in the Participant List view once their registration has been accepted.

	Participant Registration
i≡ My To Do List 24	Registration [] Activity Approval [] Section Authorized [] Adventureus Journey Award Authorized [] Unassigned Participants [] Undefineered Emails [3]
i≡ To Do List 49	Search Email Confirmation Parent Approval Payment State
Participants	Select V Select V Select V
Q, Leaders	Number of records
Adventurous Journey	Bulk operations
Guides and Policies	Select • Bulk charge
P Reports	Collect email addresses for emailing
My Organisation	Resent confirmation and the table of tabl
Message Center	Change parental consent i 17/02/2223 incore () Electronically () Later () Confirm (Approx
	Asign Labels Vialmight 01/02/023 Incode Vialmight 01/02/023

ii. In the Participant list, also as a bulk action.

Once you have selected 'Assign Labels' from the Bulk operations drop down list, tick the boxes of the Participants you wish to apply the label to (to the left of the Participant ID).

;≡ To Do List 49													
A Participants	S	elect 🔻	arch	Active	e ×▼	Select	-	Start typing	▼ Start	typ 🔻		Clear	Filter
D. Leaders												Number o	f records: 41
Adventurous Journey	Bul	operations											
Guides and Policies	s	lect		-								Bul	k change
E Reports	R	send confirmation	email	•									
(§). My Organisation	c	nange parental cons	ent	a:t Name 🔻	Email			Levels	Last log added	Labels 🔻	Award Leader	Status	~
Message Center	A	sign Labels		_									
	S	end message		et		-	8		No logs			Active Setup	
		ext level invitation	Alexander	Cole	-		Ð		4 months ago		-	Active In Progress	
			Alyssa	Test	-		θ		No logs			Active Setup	
			-		-		θ		2 years ago			Active Level Complete	

Note: when applying labels as a bulk action, there is currently an issue whereby any ticked boxes on a page will not be retained when moving to the next page of the list. The bulk action needs to be applied page by page. It is recommended that at this point, for any bulk actions applied to the Participant list, that the page view is changed to viewing 50 records to maximise the number of records that can be selected per page. Once all relevant records on the page are selected via tickbox, press the blue 'Bulk Change' button.

	Leve	l .	Search	h		Participant S	tatus	Award State	Award	l Leader	Label			
良, Participants	Se	lect 👻				Active	×Ŧ	Select 👻	Star	rt typing	Start typ		Clear	Filter
වු, Leaders													Nut	mber of records: 41
Adventurous Journey	Bulk	operations												
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(6) My Organisation		ID	y	First Name 🛛 🖤	Last	Name 3	Em	nail	2	Levels	Last log added	Labels $=$ $=$	Award Leader	Status 🖤
Message Center				Alanatest	Lee				8		No logs			Active Setup
				Alexander	Cole		-		6		4 months ago			Active In Progress
		-		Alyssa	Test	t			6		No logs		-	Active Setup
				Anna	Pott	tertest	1		6		2 years ago			Active Level Complete
				Jenna	Wor	nkenberg			6		No logs			Active Setup
	5	♥ per page	Cal	and as applying of									Export table	1 2 3 4
	10		reco	ect number of ords to display per page									Number selected to di	of pages based on number of records splay per page

iii. In a Participants' Detail tab



3. Removing labels

Labels can only be removed on an individual basis, not via bulk action. 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					
Available Labels					
Select				•	
Year 9 second group X	Summer 2022 X	Label 1 X	Label 3 X		

4. Viewing labels

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

i. Within the Details tab of a Participant's record

	Grizzly Macduff (PN001367105) Participants / Detail				۹	ORS Training Award Centre
≣ My To Do List 5	Detail Bronze Level Histor	ryLog				
To Do List 🗾		Title	0	verview		Arount Settings
, Participants		Salart		Construction (Registeration Date	
Leaders			14	ORB Training Award Ce	ntre 04/12/2021	Current
Adventurous Journey		First Name Middle Nam	Lev	rel Kost voer Kost Aller	wadding logs after 25 years of an	
Guides and Policies		Grizzty				
a Baseda		Last Name	L	evel summary		
- Apple 1		Macduff		Completed J Br	aniod Last Articly	
, My Organisation	Email		Pty	vsical Recreation 0 h / 0 h	-	Setup
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	Secondary Email		Vol	untary Service 0 h / 0 h		Setup
			Pro	ctice Journey .		
	Phone Number	Phone Type	Qu	alifying Journey .		
	GB * +447894561230	Select	•	hele		
	Secondary Phone Number	Secondary Phone Type		abets		
	UB = +44	Select	* Av	elaste		
	Date of Birth			ciore		
	01/12/2007		0	perator created X Award Centre of	reated x	

ii. Under Participants, in My Participants or All Participants

To show only the Participants with a certain label applied, there is a labels filter at the top of the Participant page. Select the label/s for the Participants you would like to view, and then the blue 'Filter' button. Only the Participants tagged with the selected label/s will show in the Participant list until the filter is cleared of the selection.

	help for cashe (0.0000000)		Search Q (
😑 My To Do List 🛛 24	My Participants All Participants		
To Do List 49	Level Search Partici	ipant Status Award State Award Leader	Label
Participants	Select 👻 Acti	ve 🗙 🔻 Select 👻 Start typing	← Start typ ← Clear Filter
Ω, Leaders			2023 Number of records: 41
Adventurous Journey	Bulk operations		Participants
Guides and Policies	Select 👻		Bulk change
Reports			
S My Organisation	□ ID ▼ First Name ▼ Last Name ▼	r Email w Levels	Last log added Labels v Award Leader Status v
Message Center	Alanatest Lee	······	No logs Active Setup
	Alexander Cole	θ 🔳 🗆 🗆	4 months ago Active

- iii. Via ORB-generated reports. The is a column displaying labels in the following reports:
 - Participant Award Progress
 - Award Completion
 - Current Active Award
 - Participants Including Payment Status
 - Voluntary Services Summary Report
 - Export list report on the Participant list view (see screenshot above)