

ORB Quick Guide:

Categorising Participants using Labels

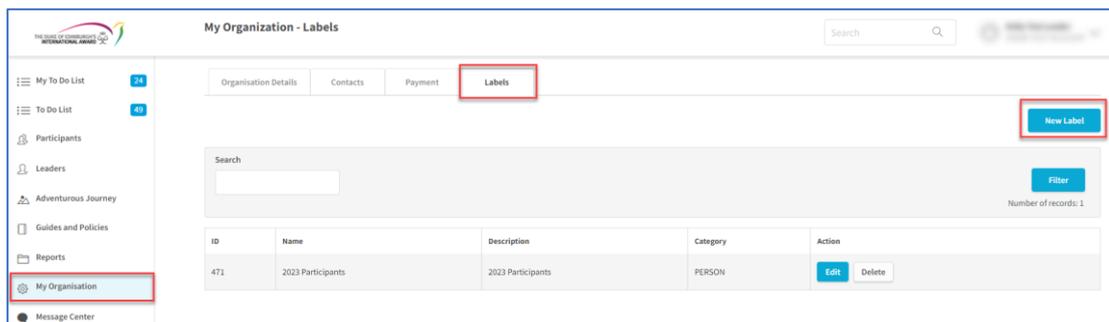
Labelling for Participants on the Online Record Book can be used to 'tag' or identify sub-groups within an Award Centre, such as age or year groups or other information that is helpful to categorise Participants for easier management. Once labels are created and applied to relevant Participants, it can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

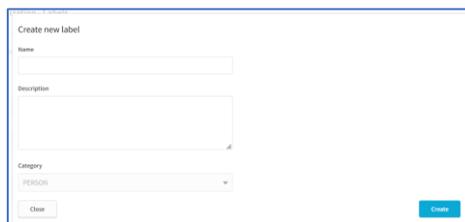
This guide on labels will show you how to create, apply and view labels.

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.



- 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.

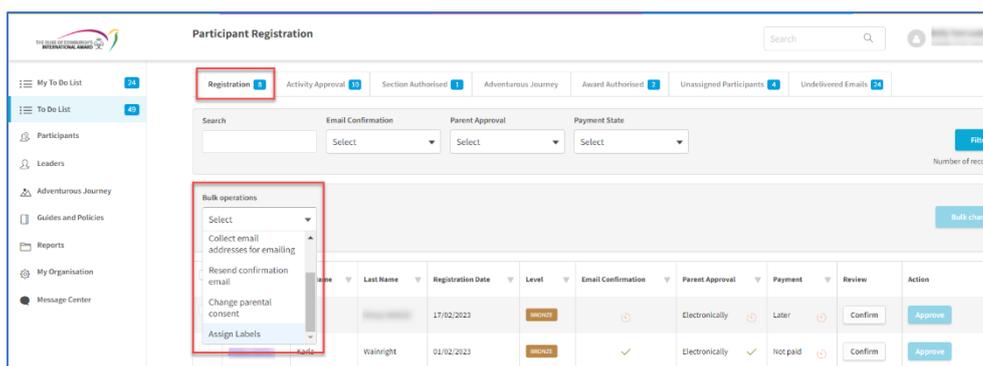


- iii. Once created, the label will display in the list view on the labels page, as the *2023 Participants* label does on the top screenshot above. These can be edited and deleted if required.

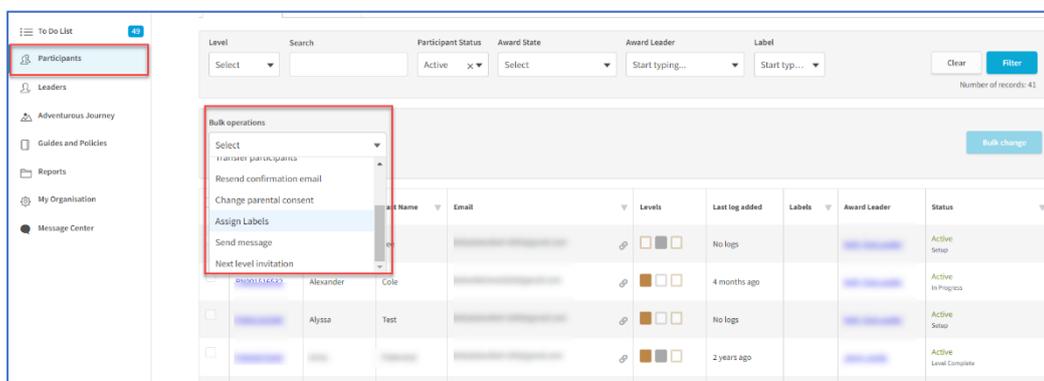
2. Assigning labels

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.



- 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).



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.

iii. In a Participants' *Detail* tab

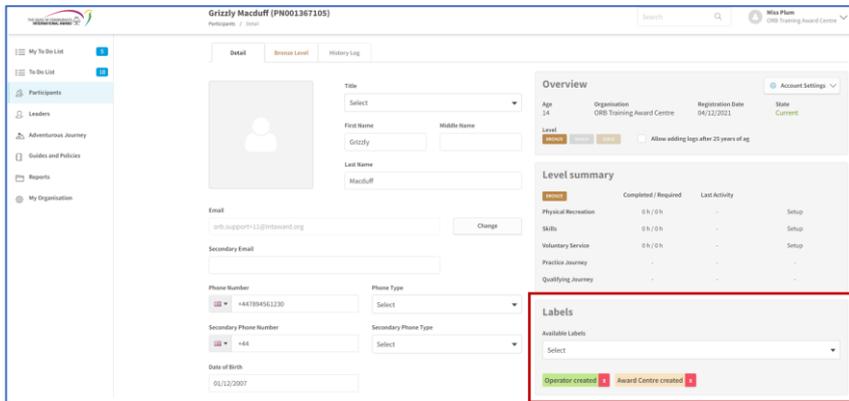
3. Removing labels

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).

4. Viewing labels

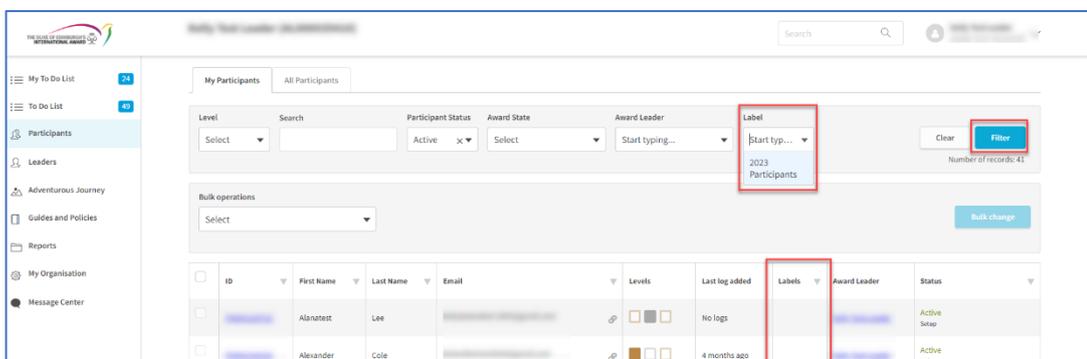
Once assigned, labels can be viewed in one of three places.

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



- 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.



- iii. Via ORB-generated reports. There 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)