

Online Record Book

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

February 2019
Version 2.1.1.



1. More about the Online Record Book (ORB)

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

The Online Record Book can be accessed via the following URL: <https://www.OnlineRecordBook.org>

Supported Browsers and Technical Information

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

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

The ORB can also be accessed using the following mobile applications:

You can also download our **Award Leader App** to access the Online Record Book anytime, anywhere.



Content

1. More about the Online record Book (ORB)...page 1
2. Register your Award Unit...page 2
3. Register as an Award Leader...page 4
4. Forgot your password...page 6
5. Landing page overview and to do list...page 7
6. My profile overview...page 8
7. Unassigned participants...page 9
8. Review and approve new registrations...page 10
9. Manage Sections and Activities...page 12
10. Mimic user feature...page 14
11. Managing your participants – Profile Details...page 15
12. Managing your participants – Award Details...page 18
13. Adventurous Journey Overview...page 23
14. Review and approve requests for Award sign-off ...page 26
15. My Organisation review...page 27

2. Register your Award Unit

If your Award Unit is not registered on the Online Record Book, you can complete its registration selecting the Award Unit registration option, as displayed below. **This should only be done in consultation with your NAO/OA/Sub-OA.**

Participant Award Staff

Participant login

Email

Password

Forgot your password?

Log In Register

You can also download our **Participant App** to access the Online Record Book anytime, anywhere.

Download on the App Store GET IT ON Google Play

Do you want to create a new Award Unit? [Continue here](#)

Option 2: Registering as an Operating Authority

Welcome to the Online Record Book

You are now registering as an Award Unit.

Select Country

Testing Country - NAO

Select your Operating Authority

01 Wales

Select sub Operating Authority

01 North Wales

If you are unsure which Award Authority you should register to, please contact your Regional Office.

Continue

Note: Additional levels may apply. Contact your National Operator (NAO) for help on this.

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

- Select your country from the list available
- Insert the Award Unit Details
- Insert the Authorising Contact / Licence Holder's personal details
- Insert the Award Co-ordinator's personal details
- Insert the Award Co-ordinator's contact details
- Set the Online Record Book Login details

Option 1: Registering as an Independent Award Centre

Welcome to the Online Record Book

You are now registering as an Award Unit.

Select Country

Testing Country - IC

☒ I want to register my Award Unit as Independent Award Centre

If you are unsure which Award Authority you should register to, please contact your Regional Office.

Continue

Organisation Details

Organisation Name

Bangor High School

Organisation Type

Government School

Are you already running the Award?

☐ Yes ☒ No

Organisation Address

Address First Line

College Campus

Address Second Line(Optional)

City

Bangor

Zip / Post Code

BA11 2DD

State/Province/Region

Gwynedd

Country

United Kingdom

Continue

Authorising Contact / Licence Holder

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

Title
Dr. x

First Name
Newman

Middle Name

Last Name
Smith

Role in Organisation
Head of Research

Email
bangor@tifu.co.uk

Confirm email
bangor@tifu.co.uk

Phone number
+441234567890

Phone type
Mobile x

Continue

Note: The licence holder is the person that signed the licence agreement.

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
Miss x

First Name
Award

Middle Name

Last Name
Leader

Date of Birth
07/01/1998

Gender
☒ Female
☐ Male
☐ Prefer not to say

What is your role in your organisation? (optional)
Head Award Leader

Note: 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.**

Address Details

Address First Line
College Campus

Address Second Line(Optional)

City
Bangor

Zip / Post Code
BA11 2DD

State/Province/Region
Gwynedd

Country
United Kingdom x

Continue

Award Coordinator Contact Details

Email
BangorAL@tifu.co.uk

Confirm email
BangorAL@tifu.co.uk

Phone number
+447890123456

Phone type
Mobile x

Continue

Online Record Book Account

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

Email
BangorAL@tifu.co.uk

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

Repeat Password

[International Terms & Conditions](#)

☒ I have read the Terms and conditions and agree with them.
☒ I confirm that I meet all NAO Regulation Requirements.
☒ I Agree to the Volunteer Code of Conduct. For more information [click here](#).

Finish

Note: Your Password must meet the requirements.

Once all details have been inserted click on **Continue** and **Finish** to send your registration for approval.

You must also read and agree to the terms and conditions and the Code of Conduct.

✓ Your registration is complete

We will send you an email when your ORB account registration is approved.

If you have any problems or doubts please contact you award unit for more information.

On your smartphone

On the web

Download on the App Store

GET IT ON Google Play

Online Record Book WEBSITE

Note: You will only receive the email once the NAO/OA/Regional Office/Award Office has reviewed and approved the registration.

3. Register as an Award Leader

You can register as a new Award Leader, selecting the **Award Leader option** on the login page, and selecting **Register**, as displayed in the login page overview.

Complete all fields, clicking on the **Continue** button to continue through the sections.

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

- Select your **Award Unit Country**
- Select your **Operating Authority** (*This will appear for those organisations with this structure on place*)
- Select your **Award Unit name**

- Type in your role in the Award, and select whether you are the **main Award Leader / Coordinator** of your organisation

- Type in your **contact details**. The country code will be automatically selected

- Insert your **personal details & address**

Address

Address First Line

Address Second Line(Optional)

City

Zip / Post Code

State/Province/Region

Country

Select

Continue

- Type in your chosen **Password**
- Check the box to confirm that you have read the Terms conditions & select **Finish**

Email

rienaferrera@yahoo.com

Password


Repeat Password

[International Terms & Conditions](#)

☐ I have read the Terms and conditions and agree with them.

Finish

Once all details have been inserted click on **Finish** to send your registration for Award office approval.

 Fri 16/11/2018 09:09
ORB@OnlineRecordBook.org
The Duke of Edinburgh's International Award - Organisation Contact Confirmation Email

To

[Action Items](#)

This is an automated email from The Duke of Edinburgh's International Award Foundation.

Thank you for registering to use the Online Record Book.

Please verify your email address by clicking the following link:

<https://www.onlinerecordbook.org/fo/email-confirmations?authorizationCode=f67105fc-f83b-43>

If you have any questions about this email or about the progress of your registration, please contact the Award Coordinator for your Award Unit.

Kind Regards,

The Duke of Edinburgh's International Award Foundation.

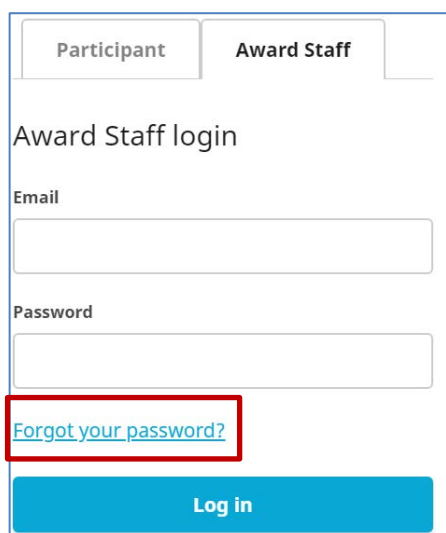
Note: You will receive an email with a link, to verify the email address. Also check your spam inbox for the email.

It is important that you complete this step, as it validate that the system has the correct email for you.

Your Award office will review your details and you will receive an email confirmation inviting you to log on to the ORB.

4. 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.



Participant Award Staff

Award Staff login

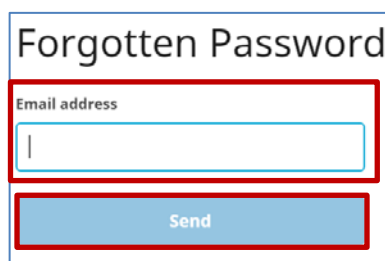
Email

Password

[Forgot your password?](#)

Log in

Insert your email address in the dialog box and press **Send**.

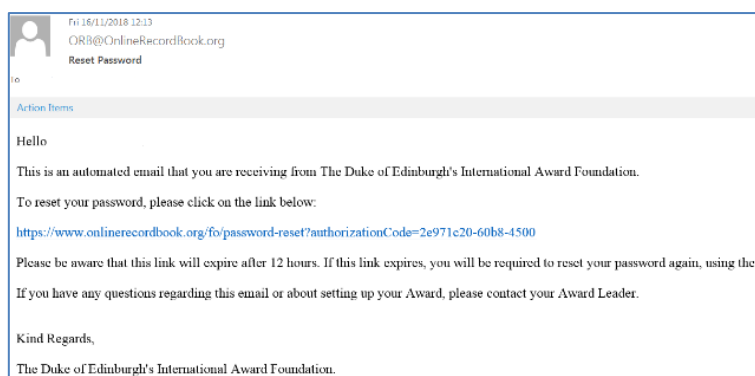


Forgotten Password

Email address

Send

An email with a link to reset your password will be sent to your mailbox.



5. Landing page overview and To Do List

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

If you receive a failed log in message, confirm that you have the selected the **Award Staff** tab.

Participant **Award Staff**

Award Staff login

Email

Password

[Forgot your password?](#)

Log in

Once you log on to the Online Record Book, your **To Do List** will appear:

To Do List **13**

Registration **10** Activity Approval Section Sign-off Adventurous Journey Award Sign-off Unassigned Participants **5**

Participants

Leaders

Adventurous Journey

User Guides

Reports








My Organisation

Email Confirmation **Parent Approval** **Payment State**

Select Select Select

Number of records: 2

ID	First Name	Last Name	Registration Date	Level	Email Confirmation	Parent Approval	Payment	Review	Action
778000182016	Seriah	(Participant)	9/12/2018	BRONZE	✓	Not required ✓	Later ⚙	Confirm	Approve
778000112292	John	PaperConsentZElectro	07/11/2019	BRONZE	✓	Electronically ⚙	Later ✓	Confirm	Approve

-  To Do List 16
-  Participants
-  Leaders
-  Adventurous Journey
-  User Guides
-  Reports
-  My Organisation

The blue square with the number, shows how many tasks are waiting in that section.

To-Do List

Once logged on to the Online Record Book you will be able to view your **To Do List** displayed as the landing page.

Registration 10 Activity Approval Section Sign-off Adventurous Journey Award Sign-off Unassigned Participants 6

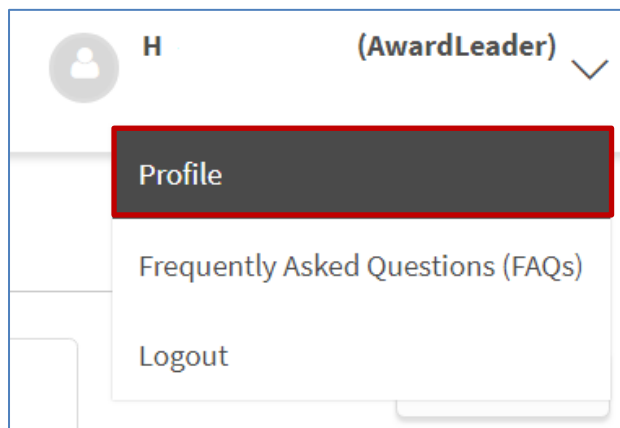
From your **To Do List** you can manage different Award sections and activities such as:


- Accept new participants who have not yet been assigned to an Award Leader
- Review and approve new registrations
- Review and approve/ask for revision of any new activity request
- Review and approve/ask for revision of any requests of section sign-off (including Adventurous Journeys)
- Review and approve/ask for revision of any requests of Award sign-off

6. 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.



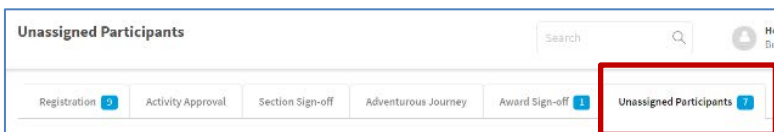
1. To make any changes to your:
 - personal details;
 - password;
 - address;
 - contact details;
 - language;
 - nationality;
 - add your training details and
 - add award history informationby clicking on any of the fields displayed to overwrite the information.
2. Press **Save** to save your changes.
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  to save your changes.

A screenshot of a user profile editing form. The form is divided into several sections. The 'Personal Details' section at the top includes fields for Title (Mr.), First Name (H), Middle Name, Last Name (AwardLeader), and Email (Leader@Test-Email.co.uk). There are buttons for 'Upload Picture' and 'Change'. To the right of these fields are sections for 'Training' and 'History', each with an 'Add' button. A 'Change password' button is in the top right corner. A 'Save' button is highlighted with a red border at the bottom right of the 'Personal Details' section. Below this is the 'Secondary Email' section with an input field. The 'Phone Number' section includes fields for Phone Number (+441234567890) and Phone Type (Home). The 'Secondary Phone Number' section includes fields for Secondary Phone Number (+44) and Secondary Phone Type (Select). The 'Date of Birth' section includes a date field (01/11/1996) and a calendar icon. The 'Address' section includes fields for Address First Line (Address Line 1), Address Second Line, State/Province/Region (State), City, Post Code, and Country (United Kingdom). The 'Nationality' section includes a dropdown menu (Select). The 'Language Settings' section includes a dropdown menu (English (United Kingdom)).

7. Unassigned participants

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

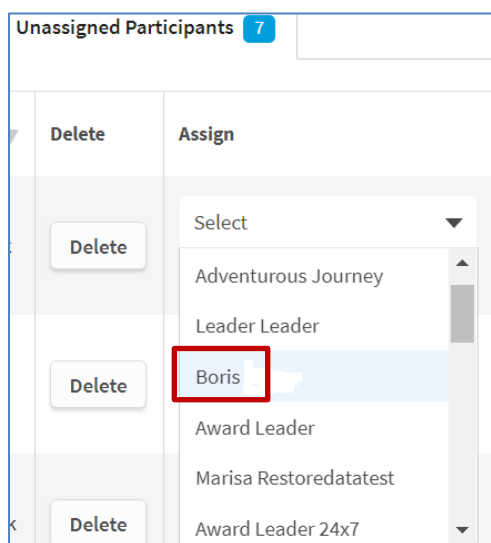
If a participant does not know who their Award Leader is when they register, their registration will be added to the group of **Unassigned Participants**.



ID	First Name	Last Name	Registration	Level	Email	Delete	Assign
PN000589916		Robson (Participant)	10/10/2018	Bronze	Robson_Participant@Test Email.co.uk	Delete	Select Assign
PN000589901		De-Wint (Participant)	10/10/2018	Bronze	De-Wint_Participant@Test-Email.co.uk	Delete	Select Assign
PN000589892		Mitchell (Participant)	10/10/2018	Bronze	Mitchell_Participant@Test-Email.co.uk	Delete	Select Assign

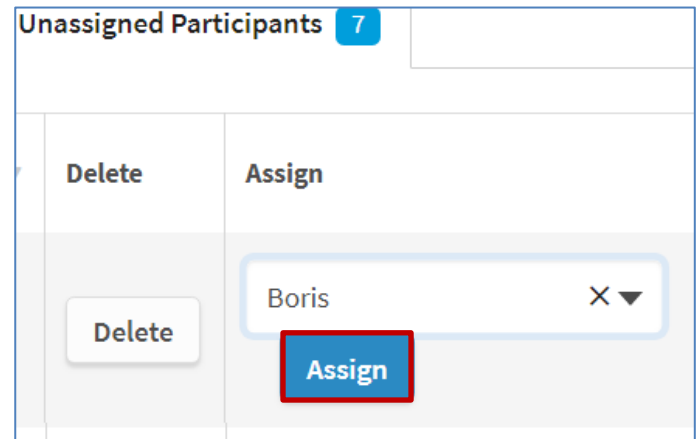
From the To-Do List select **Unassigned Participants**

1. Review the participants waiting to be assigned.
2. From the **Assign** drop down menus, select an Award Leader from the list Award Leaders available.



This list only shows Award Leaders in the Participants Award Unit.

Click on **Assign** – the registration will be then moved to the list of registrations to be reviewed.



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

Registration	Level	Email	Delete	Assign
10/10/2018	BRONZE	De-Wint_Participant@Test-Email.co.uk	Delete	Select Assign

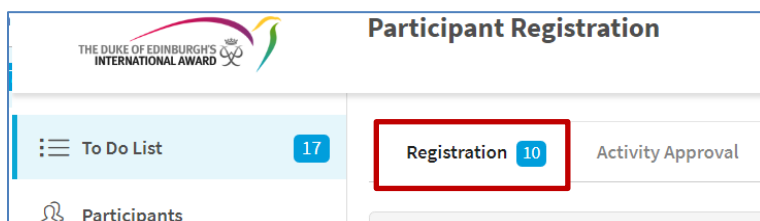
Note: Once deleted, you will not be able to recover the record.

8. Review and approve new 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 the 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).

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 on **Confirm**.

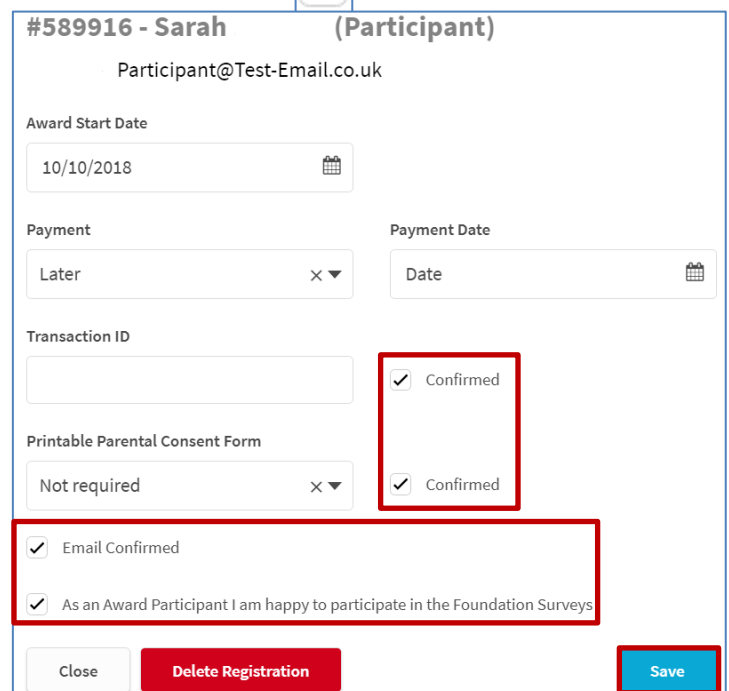
Email Confirmation	Parent Approval	Payment	Review	Action
	Not required 	Later 	Confirm	Approve
	Electronically 	Later 	Confirm	Approve
	Not required 	Not paid 	Confirm	Approve

4. 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. It can also be amended post-approval.

5. 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 ticked.

6. The Award Leader has the ability to switch Parental Consent type from Paper to Electronically.

7. From the pop up box modify the necessary details and ☒ as confirmed.



Note: It is important that you make sure that the participant confirmed their email from the ORB email that was sent to them.

In case the email is incorrect, you can correct the email and resend if necessary from the account settings section.

8. Click on **Save** to save the details.
9. If you do not recognise the registration, or it is not valid you can delete it, clicking on **Delete registration**.
10. 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.

ID	First Name	Last Name	Registration Date	Level
PN000589916	Sarah	(Participant)	04/12/2018	BRONZE

Detail
Bronze Level
History Log

Title
Ms.
First Name
Sarah
Middle Name
Last Name
(Participant)

Overview

Age 19
Organisation Brompton
Registration Date 10/10/2018
State Current

Level
BRONZE SILVER GOLD

Email
Participant@Test-Email.co.uk

11. Click on **Approve** to finish the registration approval.

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

Note: The **Approve button** will only be active when all of the registration checks have been signed off.

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

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

As the Award Leader, you may edit this date post-approval.

9. Manage Section and Activities

Review and approve/ask for revision of any new activity requests

Before logging their hours, a participant needs to set their activity and send it to their Award Leader, for approval. Award Leaders can review the activity details and either approve the activity request or ask the participant to revise it and make modifications. The participant will receive a notification with the outcome.

1. From the To-Do List select the **Activity Approval** tab.
2. Click on the tabs displayed below to find the new activities waiting for approval.
3. Review the activities listed and approve/ask for revision

ID	First Name	Last Name	Level	Activity Type	Activity	Goal	Action
P1000513556	H	(Participant)	Bronze	Foreign Languages	French	Learn basic French level 1 (speak, read and write). Goal of learning 10 new words every week. Learn 20 French verbs every month. Must be able to pass the Level 1 oral and written exam by 30 November 2018.	Approve Revise

Activity Type	Activity	Goal	Action
Foreign Languages	French	Learn basic French level 1 (speak, read and write).	Approve Revise

Title	Name	Email	Phone	State
Mrs	A French	afrench@yahoo.com	---	---

Any comments made in the dialog box, when asking for revision, will be sent to the participant along with a notification.

Revise Item?

Note

Please refine your SMART goal by adding a time line and a measurable.

Dismiss Revise

Once the participant has made all the changes and the Award Leader is satisfied, you can approve. If not, please click on revise and send back to the participant with a message.

Activity Type	Activity	Goal	Action
Foreign Languages	French	Learn basic French level 1 (speak, read and write). Goal of learning 10 new words every week. Learn 20 French verbs every month. Must be able to pass the Level 1 oral and written exam by 30 November 2018.	Approve Revise

Approve Item?

Approve

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

Review and approve/ask for revision of any requests of Section sign-off

Once a participant has completed a section of their Award and received Assessor approval, the section is ready for Award Leader sign-off.

1. From the To-Do List select the **Section Sign-off** tab.
2. Click on the tabs displayed below to find the sections waiting for Sign-off.

ID	First Name	Last Name	Level	Finished	Logs	Assessor approval	Note for Award Leader	Action
613058	H	(Participant)	Bronze	06/12/2018	View	View	View	Approve Revise

Activity Type	Activity	Goal	Action
Foreign Languages	French	Learn basic French level 1 (speak, read and write).	Approve Revise

3. Click on **View** to see logs, Assessor's report and Notes
4. Review the activity and its logs
5. Click on Approve or Revise as necessary

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

Action

Approve

Revise

Revise Item?

Note

Dismiss

Revise

Approve Item?

Dismiss

Approve



Section has been signed off

10. Mimic user feature: log-in as one of your participants to provide system support

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, sign-out as an Award Leader and click on the **Participant Tab** on the log-in page.

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.

Participant Award Staff

Participant login

Email

awardleader70@gmail.com/participant40@gmail.com

Password

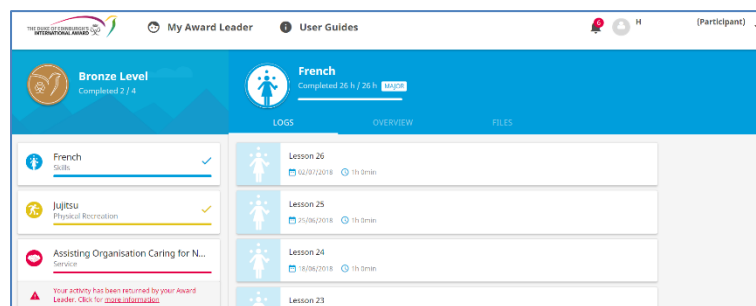
The same password as your Award Leader login password.

[Forgot your password?](#)

Log in

You

You



You are now logged-in as the participant and are able to view the full profile, sections, activities and logs of the participant.

You can now 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 reflect in the History Log under your name with the date, time and description of the changes etc.

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


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

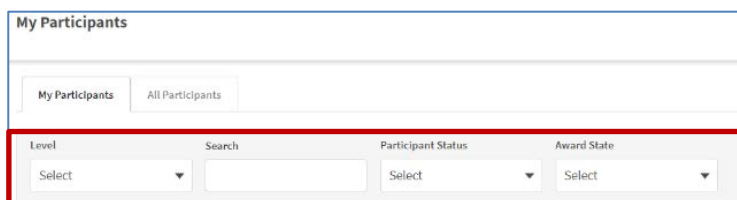
11. Managing your participants – Profile Details

Once a participant has started their Award activities, the Award Leader's role is to mentor them through their Award with advice and encouragement.

Via the Online Record Book, Award Leaders are able to manage either all participants registered to their Unit or participants assigned to them personally, depending on the configuration set by their National Operator/Regional Office.

1. Browsing participant's details

2. Select  **Participants** from the menu.
3. Select **My participants** to view the list of your participants.
4. Select **All participants** to view the list of participants registered to your Award Unit.
5. After clicking on the ID of the selected participant, you will be taken to their record.



Search function

You can use the filters available to sort your list of participants by Award Level, Status and Award State.

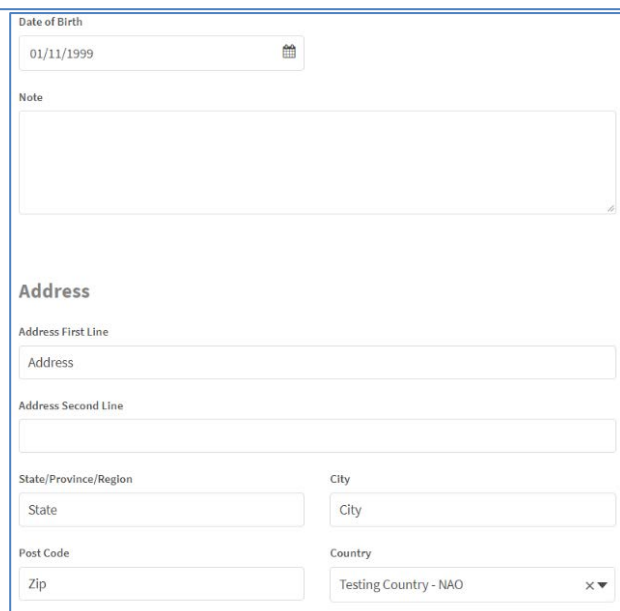
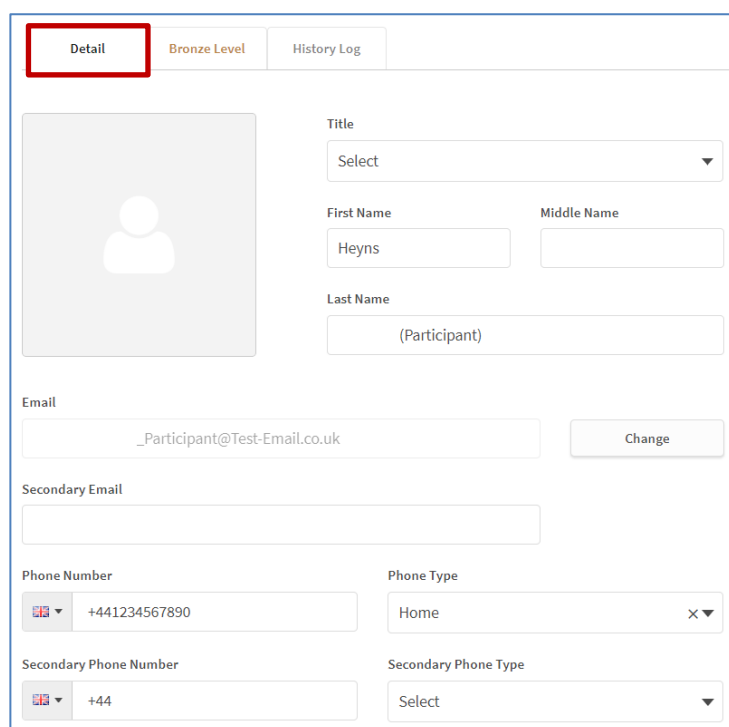
You can export the list of participants displayed on screen to Excel by clicking  on the button at the bottom of the screen.

2. Viewing a participant's profile

Select the applicable participant by clicking on the ID number.

ID	First Name	Last Name	Email	Levels
PH000619288	Heys	(Participant)	Participant@Test-Email.co.uk	BRONZE SILVER GOLD
PH000588916	Sarah	(Participant)	n_Participant@Test-Email.co.uk	BRONZE SILVER GOLD

Select the Detail Tab to view and amend the personal details of the participant.



3. Edit a participant’s profile details

Once you have navigated to a participant, you can edit any of their details by clicking in the fields available and overwriting the information displayed.

Add Postal Address

Other Information

Nationality

British

Gender

Male

Employment Status

Casual

Previous Level (not ORB)

Select

Where

☒ Participant agrees that we can use his/her profile picture for promotion

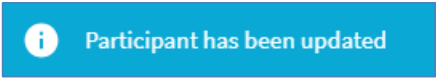
You can edit the following profile details:

- Photo
- Title
- First name
- Middle name
- Last name
- Email address
- Secondary email address
- Phone number
- Secondary email address
- Date of birth
- Address
- Postal address
- Nationality
- Gender
- Employment

Click the

Pending changes... Save

 button displayed at the bottom of the page to save your changes.



Note: The Participant's History Log will show who performed the changes.

4. Edit your participant’s account settings

Overview

Account Settings

Age

19

Organisation

Brompton

Registration Date

16/11/2018

State

Current

Level

BRONZE

SILVER

GOLD

Once you have navigated to a participant’s profile, choose the

Account Settings

 option to make any modifications such as:

- Change Participant's Status

Send confirmation email again?

Recover Password

Next level invitation

Delete Contact

Once the option is selected, confirm your choice by clicking on

Confirm

.

6. Change the status of a participant

As an Award Leader you can mark a participant’s Award either as **Current** or **Archived** by navigating to their Award. From the workflow bar displayed in the Award detail tab, click on the option **Archived**.

Overview

Account Settings

Change Participant's Status

Send confirmation email again?

Recover Password

Next level invitation

Delete Contact

Age

19

Organisation

Brompton

Registration Date

10/10/2018

Level

BRONZE

SILVER

GOLD

State

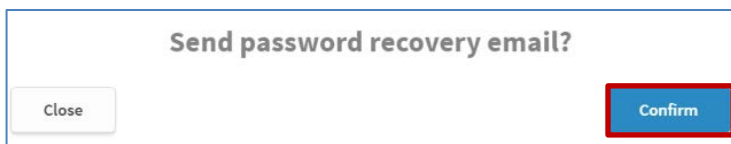
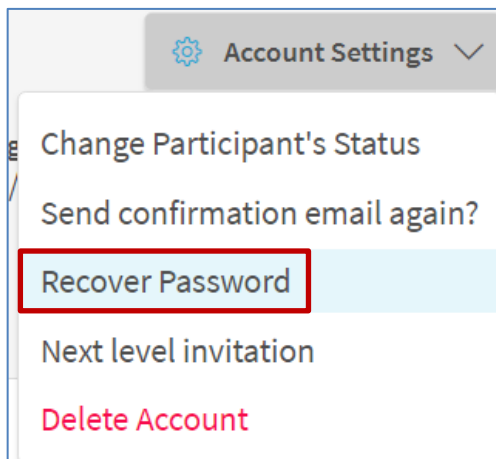
Archived

Close

Change State

7. Send password recovery email to participant

1. To send the password recovery to a participant, click on **Account Settings** in the participant's profile.
2. Select **Recover Password**.
3. Click on **Confirm**.
4. The participant will receive an email to reset his/her ORB log-in password.



12. Managing your participants – Award Details

Once a participant has started their Award activities, the Award Leader's role is to mentor them through their Award with advice and encouragement.

Via the Online Record Book, Award Leaders are able to manage either all participants registered to their Unit or participants assigned to them personally, depending on the configuration set by their National Operator/Regional Office.

1. Editing Award details

Select the applicable Award Level tab:

The screenshot shows the 'Award Details' page with the 'Bronze Level' tab highlighted in red. The page includes sections for 'Parent / Guardian Consent', 'Overview', and 'Leader'. The 'Overview' section shows the Award State as 'Awaiting Organisation Approval' and the Award Leader Sign-off date as '17/12/2018'. The 'Leader' section shows the Name as '(AwardLeader)', Email as 'Leader@Test-Email.co.uk', and Phone Number as '+441234567890'. A 'Change' button is visible next to the Leader information.

This screenshot shows a simplified view of the 'Award Details' page. The 'Bronze Level' tab is highlighted in red. Below the tabs, there are icons for 'Physical Recreation' and 'Skills'. At the bottom, there are buttons for 'Registration Assessment', 'Registration Approval', and 'Setup'.

2. Award Payment

To change an Award payment status, navigate to the participant's profile page and insert the status and date of the payment, confirming the payment and saving the modification.

Note: If paid through the Payment Gateway, you won't be able to edit this.

Click on **save** after you have made changes.

The screenshot shows the 'Payment' form. It includes fields for 'Form of Payment' (set to 'Paid'), 'Date of Payment' (set to '16/11/2018'), 'Transaction ID' (set to 'Paid by Cash'), and a checkbox for 'Payment Confirmed' which is checked.

3. Change of Award Leader

To change a participant's Award Leader:

- Look for the Leader section and click on **Change**.

The screenshot shows the 'Leader' section of the Award Details page. The 'Change' button is highlighted in red. The section displays the Name as '(AwardLeader)', Email as 'Leader@Test-Email.co.uk', and Phone Number as '+441234567890'.

This screenshot shows a simplified view of the 'Leader' section. The 'Change' button is highlighted in red. It displays the Name as '(AwardLeader)', Email as 'Leader@Test-Email.co.uk', and Phone Number as '+441234567890'.

- From the pop-up select the participant's new Award Leader from the list available.

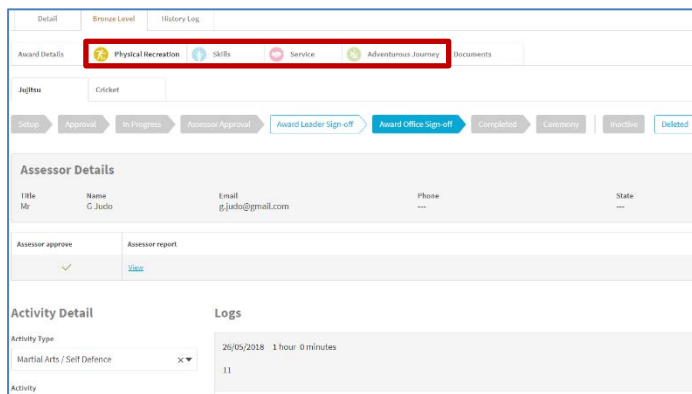
ID	First Name	Last Name	Email
581	New Award Leader	Leader	testaward00+ys@gmail.com

- Press **Change** to save the Award Leader change.

4. Browsing a participant's Award details

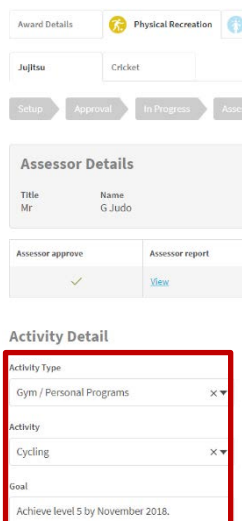
To view a participant's Award details:

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)
 - Activities setup
 - Assessor's details
 - Logs
 - Documents



5. Editing a participant's Award details

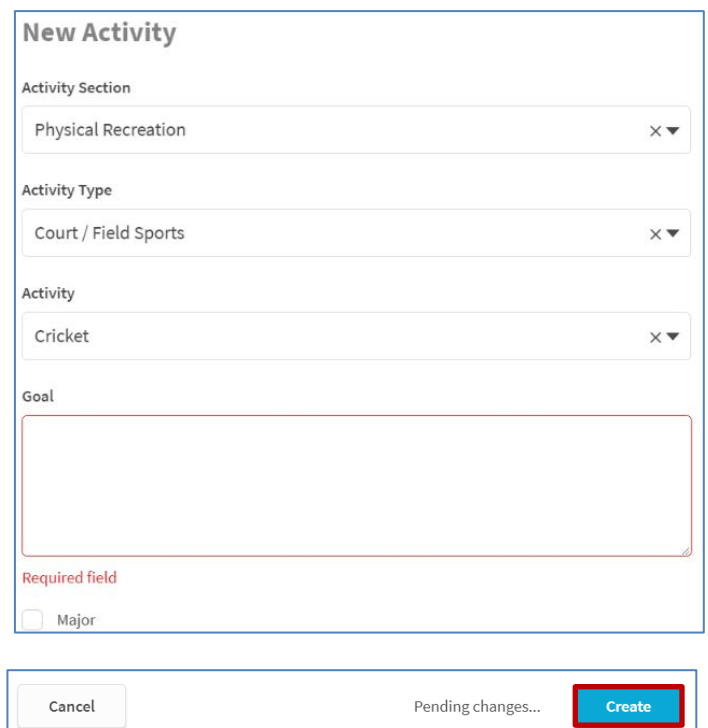
Once you have navigated to a participant's Award, you can edit any of the details by clicking in any of the fields available and overwriting the information displayed.



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

To set up an activity on behalf of a participant:

1. Navigate to your participant's Award Section.
2. Select **Section** and click on **Add Activity**, select an activity from the drop down list.
3. Complete the required details.
4. Press **Create** at the bottom of the page to save the new activity.



7. Adding logs on behalf of a participant

To add logs on behalf of a participant:

1. Navigate to your participant's Award Section.
2. Click on the option **Add log** displayed underneath the list of logs already in the system, if any.
3. Insert the details required such as description, date and duration.
4. Click on **Save** to add your log.

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

Add Log

Date:

Duration: :

Description:

Your changes will be saved and the next time your participant accesses the participant web, the log will appear against their selected activity.

8. Change logs on behalf of a participant

To edit a log:

1. Click on the log you would like to edit.
2. Edit the details displayed, as necessary.
3. Press **Save** to save your changes.

Edit Log

Date:

Duration: :

Description:

9. Deleting logs on behalf of a participant

To delete a log:

1. Click on the log you would like to delete.
2. Click on **Delete**.
3. Select **Confirm** to confirm your choice.

Edit Log

Date:

Duration: :


Description:

Would you like to delete this log?

10. Delete/Restore activities on behalf of a participant

As an Award Leader, you are able to delete or restore activities only if multiple activities have been set up for a Section.

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 on .
4. Confirm your choice, click on **Change**.


The activity will be removed from the participant's ORB profile.

Change to Deleted

Close

Change

Please note:


Activity can be deleted only in state SETUP or IN PROGRESS.

To restore the activity navigate to the participant's Section and click on

Restore Activity

.

Jujitsu

Cricket

Setup

Approval

In Progress

Assessor Approval

Deleted

This activity is deleted. You can restore it by clicking the button below.

Restore Activity

11. Add a document on behalf of a participant

To add a document to the participant's Award:

- Click on the

Documents

 tab.
- Click on

Upload File

.
- Insert the title and description.
- Select the activity the document refers to from the dropdown list available.
- Choose file and click on

Upload

 at the bottom of the page.

Title

Description

Activity Section

Select

Choose file

No file chosen

Close

Upload

Note: The file size is limited to 10mb.

12. View a participant's history

You can view a participant's history including any modifications or approvals made:

- Click on the tab

History Log



 within the participant's profile.
- The participant's history will be then displayed.

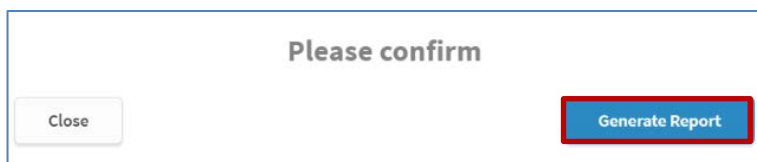
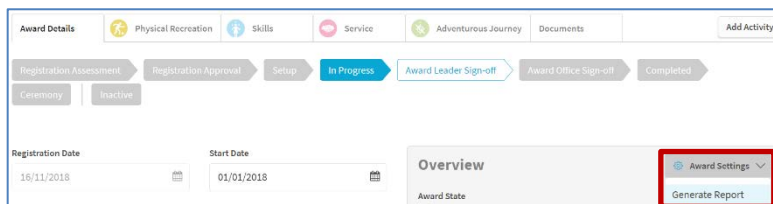
Detail	Bronze Level	History Log
Date / Time	Description	
11/12/2018 10:53	{AwardLeader} has changed the state of the activity "Cricket", for the participant " {Participant}", to Deleted.	
10/12/2018 13:05	Administrator "	{AwardLeader}" has logged in as " {Participant}"
10/12/2018 12:51	Administrator "	{AwardLeader}" has logged in as " {Participant}"
10/12/2018 11:06	{AwardLeader} did not sign off the Assisting Organisation Caring for Neglected Animals e.g. RSPCA activity with a role: ##	
10/12/2018 11:05	{AwardLeader} has changed the state of the activity "Assisting Organisation Caring for Neglected Animals e.g. RSPCA", for the participant " {Participant}", to Awaiting Sign-off.	

13. 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 for you to save.



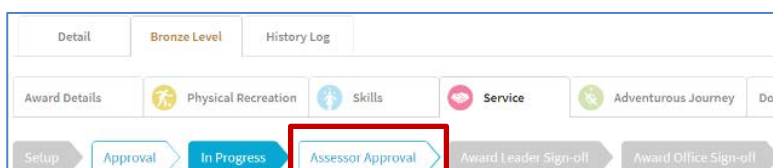
14. Submitting a section on behalf of a participant

As an Award Leader, you can submit a section for Award Leader sign-off on behalf of your participant.

N.B. It is recommended that all logs have been added and the section is complete based on minimum time requirements and minimum hours required.

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

1. Navigate to your 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.

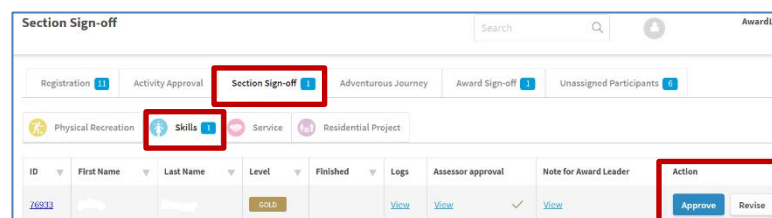


- If approval is received via the email generated by the ORB and sent to the Activity Assessor, the workflow bar will move automatically to Section sign-off once approval is given.
- If assessment has been received in hand, you can move the workflow bar manually to Section sign-off once you have uploaded the report in the documents section tab.

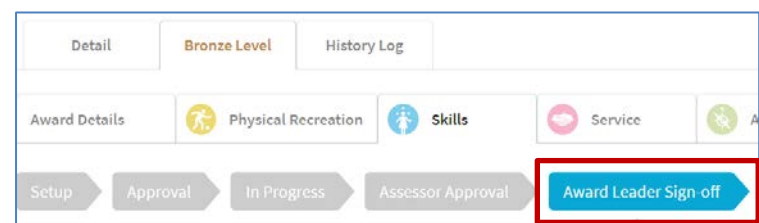
The section will be displayed in the To-Do List of your Award Unit under **Section sign-off** tab.

The Section must be reviewed before sending to Award office approval. This can be done via the To-Do List (a) or moving the workflow bar to **Award office sign-off**, after navigating to the participant's section (b).

(a) Approval via the To-Do List



(b) Approval via the workflow bar

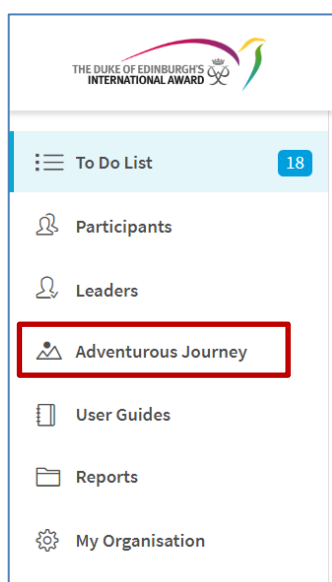


13. Adventurous Journey overview

By using the Online Record Book, Award Leaders will be able to:

- Create and manage new Adventurous Journey Events
- Create and manage new Adventurous Journey Libraries

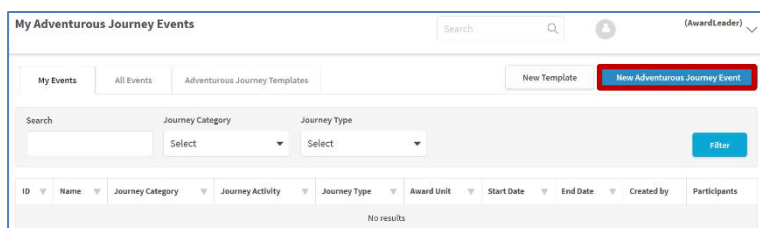
From the menu on the left select **Adventurous Journey**.



Creating a new Adventurous Journey Event

To create a new Adventurous Journey Event:

1. Select **New Adventurous Journey Event**.
2. Add all details of Journey and give the AJ a name to make it identifiable to you and your participants.
3. 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. Only participants on the Award level will be displayed. Select those participants you wish to invite.

You can narrow the selection of participants by typing in their names.
6. Click **Set participants** to save your changes.

My Events | All Events | Adventurous Journey Templates | New Template | **New Adventurous Journey Event**

Search: Journey Category: Journey Type: **Filter**

ID	Name	Journey Category	Journey Activity	Journey Type	Award Unit	Start Date	End Date	Created by	Participants
686833	AJ Event for Training	Practice	Cycling	Expedition	Brompton	07/12/2018	08/12/2018	(Award Leader)	0

You can choose to remove participants 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.

Detail | **Participants** | Additional Files

Manage Participants

ID	First Name	Last Name	Goal	Finished	Assessor approve	Observations	Actions
FN00002025	John	May	Details			View	---
FN000077318	Yogesh	Sharma	Details			View	---

Search by email, first or last name

Start typing:

2595	John		mail@johnccmay.net		Remove
56887	Yogesh		info@SysAdmin101.com		Remove
172492	Sylvia		testaward00+114@gmail.com		Remove
578216	Sarah	(Participant)	Robson_Participant@Test-Email.co.uk		Remove
580202	Einstien		593+jwhM1@gmail.com		Remove
580136	Olivia		593+jwhF@gmail.com		Remove

Close **Save changes**

Adding files to an Adventurous Journey Event

To add files or documents to and Adventurous Journey Event:

1. Navigate to the Adventurous Journey you would like to add files to.
2. Select the tab **Additional files**.
3. Click on **Upload file**.
4. In the pop up, give the file a title and description and search for the document you wish to upload.
5. Select **Upload**.
6. You can view, edit and delete files by selecting.
7. **Edit** and **View more**.

Additional Files

Upload File

loaded by	Date	Section	Assessor report	Action
No results				

Section	Assessor report	Action
Adventurous Journey		Edit View more

Title

Report 1

Description

Report 1

Close **Remove** **Edit**

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



You must remove or re-assign all participants first, or you will see the warning message.

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  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

Journey Category

Select

Journey Type

Select


Filter

ID	Journey Category	Journey Activity	Location
1	Bushwalking	Expedition	Lake District

Close

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  **Adventurous Journey Template Settings**.
- 3. From the pop-up click on **Remove** and confirm your choice.

Adventurous Journey Template Settings

Remove

Close

14. Review and approve/ask for revision for any requests for Award sign-off

Once a participant has completed all sections of their Award, the Award is ready for Award Leader's sign-off.

1. From the **To-Do List** select **Award Sign-off Tab**.
2. Click on the participant requesting the sign off
3. Review participant's personal details from the tab **Details**.
4. Click on the tab nominated as the participant's Award level.
5. Review Sections and logs moving between the Section tabs.
6. From the tab **Award Detail**, click on Approve or Revise, as necessary.

You can either approve or revise the Award:

Submitting an Award on behalf of a participant

As an Award Leader, you can submit an Award for Award Leader sign-off on behalf of your participant.

It is recommended that all logs have been added and all sections are complete based on minimum time requirements and minimum hours required.

The Award must be reviewed before sending to Award office approval. This can be done via the To-Do List (a) or moving the workflow bar to **Award office sign-off**, after navigating to the participant's Award. (b).

(a) Approval via the To-Do List

(b) Approval via the workflow bar

Note: If you complete this action as the Award Leader, it will show in the **History Tab** accordingly.

15. My Organisation Review

You can browse your Award Unit details and contacts by clicking on **My Organisation** from the side menu bar.

To Do List

18

Participants

Leaders

Adventurous Journey

User Guides

Reports

My Organisation

My Organisation

Organisation Details

Contacts

Payment

LOGO

Name

Type

Open Award Centre

Phone Number

Fax

Website

www.intaward.org

Facebook

Overview

International Region

Europe, Mediterranean, Arab States (EMAS)

National Award Authority

Testing Country - NAO JWH

State

Active

Created at

14/08/2017

Active Participants

51

Total Participants

51

Active Leaders

20

Authorising Contact

Change

First Name

Yogesh

Middle Name

Last Name

Leader

Email

ys@gmail.com

Phone

Lead coordinator

Add Coordinator

First Name

Shari

Middle Name

Last Name

Leader

Email

00+ys@gmail.com

Phone

Billing Address

Address First Line

Award

Address Second Line

State/Province/Region

England

City

London

Post Code

Shipping Address

Same as Billing

Address First Line

Address Second Line

State/Province/Region

City

Post Code

27

Editing your Award Unit's details/logo

To change any details about your Award Unit:

1. Click on the field you would like to change and overwrite the information displayed.
2. Click on **Save** at the bottom of the screen to save your changes.
3. To change your logo, click on the LOGO area.
4. Select and open your logo image when prompted.
5. Click on **Save** at the bottom of the screen to save your changes.

Editing the Authorising contact / Award Coordinator

To edit your Unit's authorising contact or Award coordinator:

1. Navigate to your Organisation's details tab.
2. Click on the change button displayed where the authorising contact or coordinator contact's details are displayed.
3. Select the new contact from the drop-down list displayed in the pop-up box.
4. Click on **Set** to set the new authorising contact or coordinator.

To add multiple coordinators click on the

Add coordinator option displayed and select the organisation you would like to add the coordinator to.

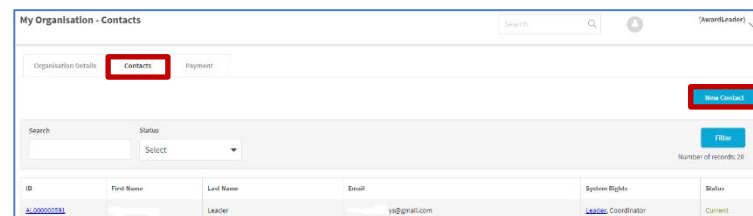
In the Contacts tab, you can view the list of contacts in your Organisation.

To view more information about the contacts listed, just click on the contact's ID. Their profile page will then appear if this option has been enabled by your NAO / RO.

Adding new contacts

You can add new contacts within your Award Unit:

1. Click on the tab **Contacts** within **My Organisation**.
2. Select the option **New Contact**.
3. Fill all contact information necessary from the pop-up displayed.
4. Click on **Create** to finish creating your new contact.



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

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

Payment Tab

My Organisation

Organisation Details

Contacts

Payment

LOGO

Name

Type

Open Award Centre

Phone Number

Fax

Website

www.intaward.org

Facebook

The **Payment Tab** will indicate the payment types being used by the Award Unit.

My Organisation - Payment

Organisation Details

Contacts

Payment

Global payment method

Online Mastercard payment option for award. Customisation for sub/operating authority/NAO

false

Online PayPal payment option for award. Customisation for sub/operating authority/NAO

true

Need to Insert transaction ID for payments outside the ORB (Customisation for sub/operating authority/NAO)

false

Direct payment option for award. Customisation for sub/operating authority/NAO.

true

Exempt payment option for award. Customisation for sub/operating authority/NAO

false