

# Online Record Book

---

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

02/04/2018  
Version: 1.7

## Version control

Version	Date	Author	Notes
1.0	04/05/2016	Daniela Pozzi	First Version
1.2	20/06/2017	Daniela Pozzi	Content Updates
1.3	08/08/2017	Daniela Pozzi	Content Updates
1.4	25/08/2017	Daniela Pozzi	Content Updates
1.5.1	07/12/2017	Marisa English	Content Updates
1.6	31/01/2018	Marisa English	Content Updates
1.7	02/04/2018	Marisa English	Content Updates

### *Summary of the changes:*

*V1.2: Screenshot updates to reflect the system; Adventurous Journey and Adventurous Journey Template deletion instructions inserted, guidance about password change, guidance about adding new contacts, ORB User guides explanation inserted.*

*V1.3: Screenshot updates to reflect the system; Explanation on how to add, delete and restore multiple activities on behalf of the participant; instructions on how to set multiple coordinators.*

*V1.4: Screenshot updates to reflect the system; explanation on how to export a list of participants; instructions on how to download a participant's Award Summary report.*

*V1.5: Screenshot updates to reflect the system; updated information on registering within an Operating Authority; instructions on how to update trainings and add history records inserted; guidance on resending parental approval email; amending participant start date at registration; instructions on selecting participants for an Adventurous Journey event; instructions on adding files to an Adventurous Journey Event; User Guides and FAQ*

*V1.6: Screenshot updates to reflect the system; updated information on Adventurous Journey names;*

*V1.7: Screenshot updates to reflect the system*

# Contents

• Version control .....	1
• Contents .....	2
• Introduction.....	4
Supported Browsers and Technical Information.....	4
• Getting Started .....	5
Overview Login Page .....	5
<b>1. Register your Award Unit .....</b>	<b>5</b>
<b>2. Register to become an Award Leader .....</b>	<b>6</b>
<b>3. Forgot your password? .....</b>	<b>6</b>
• Landing Page Overview .....	7
<b>To-Do List .....</b>	<b>7</b>
• <b>Unassigned participants: .....</b>	<b>8</b>
• <b>Review and approve new registrations .....</b>	<b>8</b>
• <b>Review and approve/ask for revision of any new activity requests .....</b>	<b>10</b>
• <b>Review and approve/ask for revision of any requests of section Sign-off .....</b>	<b>10</b>
• <b>Review and approve/ask for revision Adventurous Journey section .....</b>	<b>11</b>
• <b>Review and approve/ask for revision of any requests for Award sign-off .....</b>	<b>11</b>
• <b>Managing your participants .....</b>	<b>12</b>
• <b>Browsing a participant's details: .....</b>	<b>12</b>
• <b>Participant Profile Overview .....</b>	<b>13</b>
• <b>Edit a participant's personal details .....</b>	<b>14</b>
• <b>Edit your participant's account settings .....</b>	<b>14</b>
• <b>Award Payment .....</b>	<b>14</b>
• <b>Change of Award Leader .....</b>	<b>14</b>
• <b>Award Details Overview .....</b>	<b>15</b>
• <b>Browsing a participant's Award details .....</b>	<b>15</b>
• <b>Editing a participant's Award details .....</b>	<b>16</b>
• <b>Setting up activities on behalf of a participant.....</b>	<b>16</b>
• <b>Adding logs on behalf of a participant.....</b>	<b>16</b>
• <b>Change logs on behalf of a participant .....</b>	<b>17</b>
• <b>Deleting logs on behalf of a participant.....</b>	<b>17</b>
• <b>Setting up multiple activities on behalf of a participant.....</b>	<b>17</b>
• <b>Delete/Restore activities on behalf of a participant .....</b>	<b>18</b>

- **Add a document on behalf of a participant** ..... 19
- **Track a participant’s history** ..... 19
- **Generating a participant’s Award Summary report** ..... 20
- **Submitting a section on behalf of a participant** ..... 20
- **Mark a participant as Inactive** ..... 22
  - **Adventurous Journey Overview** ..... 22
- **Creating a new Adventurous Journey Event** ..... 23
- **Inviting participants to an Adventurous Journey Event** ..... 23
- **Adding files to an Adventurous Journey Event** ..... 24
- **Deleting an Adventurous Journey Event** ..... 24
- **Creating a new Adventurous Journey template** ..... 24
- **Delete an Adventurous Journey Template** ..... 25
  - **My Organisation Overview** ..... 25
- **Editing your Award Unit’s details/logo** ..... 26
- **Editing the Authorising contact / Award Coordinator** ..... 26
- **Adding new contacts** ..... 27
  - **My Profile Overview** ..... 28
- **Online Record Book User Guides** ..... 30

## Introduction

---

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

This document has been written for Award Leaders who are participating to the Duke of Edinburgh's International Award programme. It provides detailed, step-by-step guidance on how to use the new Online Record Book web interface.

The Online Record Book can be accessed via <https://www.onlinerecordbook.org/>

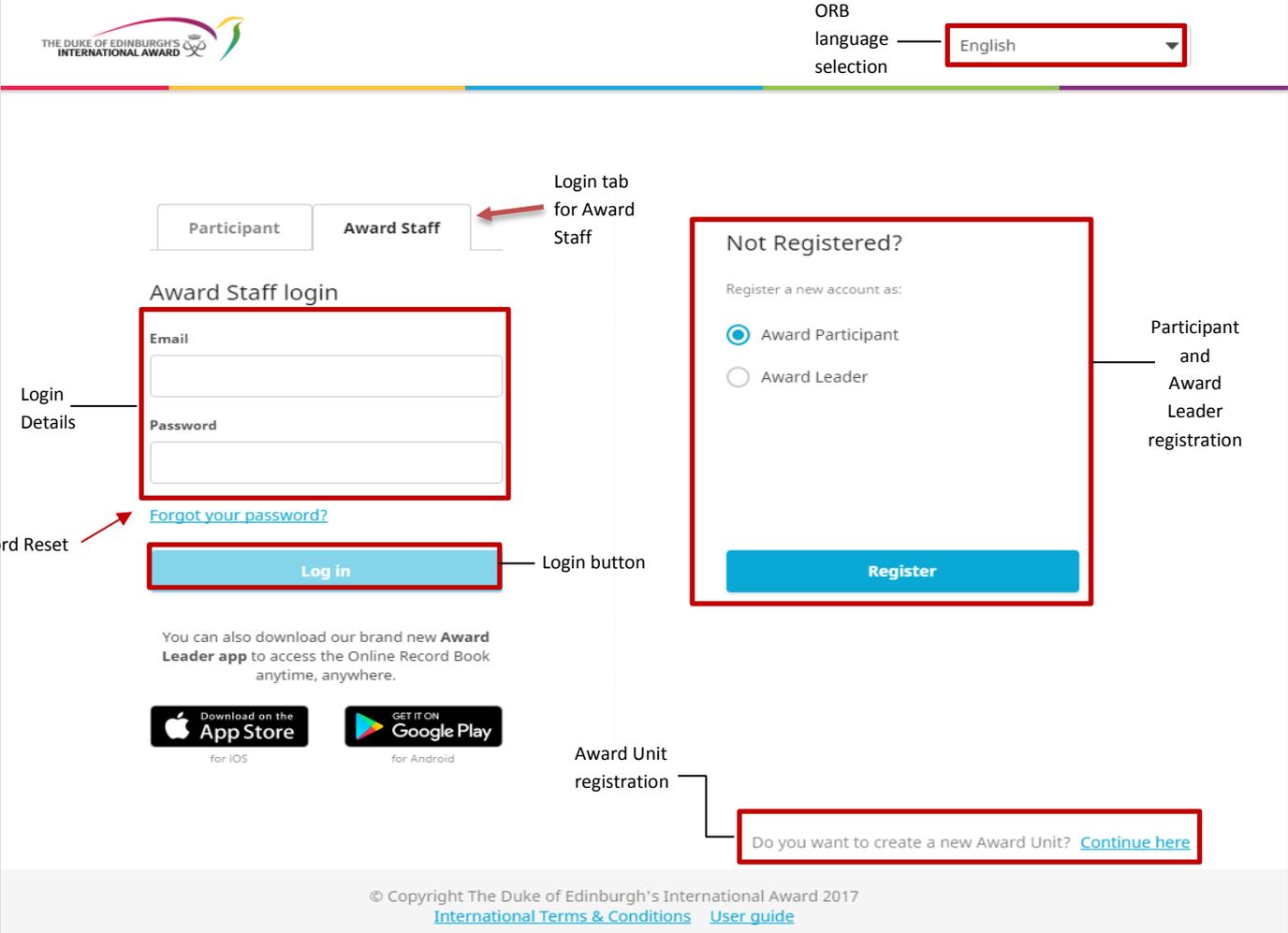
## Supported Browsers and Technical Information

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



ORB language selection: English

Participant | **Award Staff** (Login tab for Award Staff)

**Award Staff login**

Login Details: Email, Password

Forgot your password? (Password Reset)

Log in (Login button)

**Not Registered?**

Register a new account as:

- Award Participant
- Award Leader

Participant and Award Leader registration

Register

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

Download on the App Store for iOS | GET IT ON Google Play for Android

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

© Copyright The Duke of Edinburgh's International Award 2017  
[International Terms & Conditions](#) [User guide](#)

## 1. 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 above.

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 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

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

**Note:** The Award Co-ordinator will receive an email with a link to verify the email address set during registration process.

Your Award office will review your details and, once your Award Unit has been approved, the Nominated Award Leader will receive an email inviting them to log on to the Online Record Book (ORB).

## 2. Register to become 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  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*)
- Type in your Award Unit name
- Set your role in the Award (optional), and whether you are the main Award Leader / Coordinator of your organisation
- Insert your contact details
- Insert your personal details
- Set your Online Record Book Login details
- Check the boxes to confirm you have done as required

[International Terms & Conditions](#)

- I have read the Terms and conditions and agree with them.
- I confirm that I meet all NAO Regulation Requirements.



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

**Note:** You will receive an email with a link, to verify the email address. Your Award office will review your details and you will receive an email confirmation inviting you to log on to the ORB.

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

## Forgotten Password

Email address

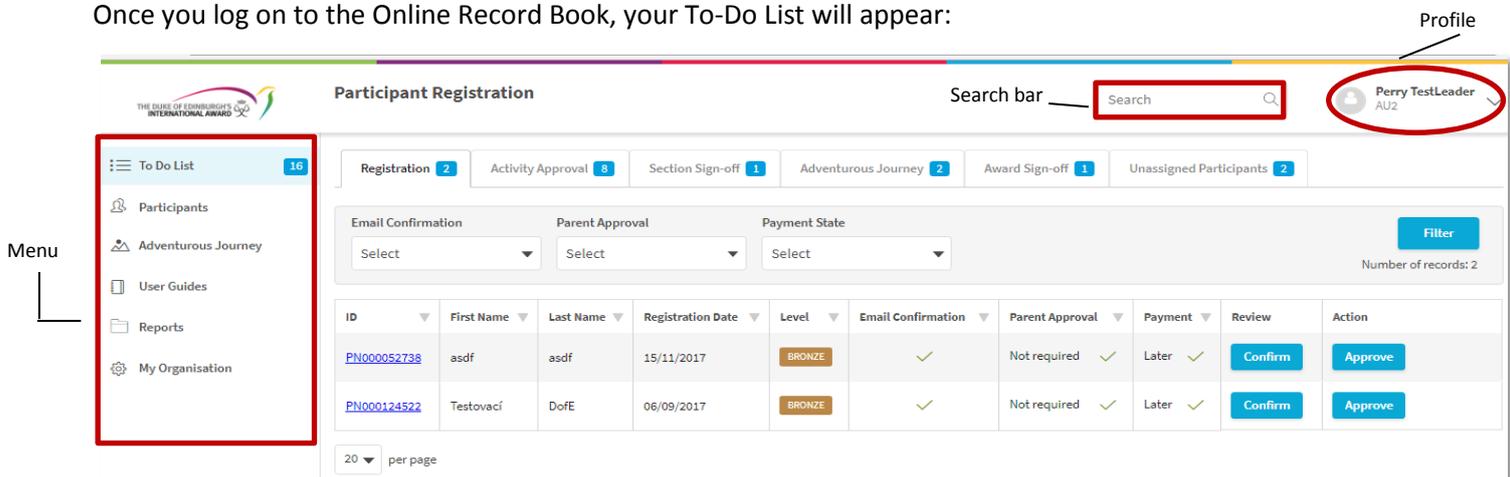
Required field

[Send](#)

## 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 Online Record Book, your To-Do List will appear:



**Participant Registration**

Search bar: Search

Profile: Perry TestLeader AU2

Menu:

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

Registration (2) | Activity Approval (8) | Section Sign-off (1) | Adventurous Journey (2) | Award Sign-off (1) | Unassigned Participants (2)

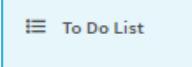
Email Confirmation: Select | Parent Approval: Select | Payment State: Select | Filter

Number of records: 2

ID	First Name	Last Name	Registration Date	Level	Email Confirmation	Parent Approval	Payment	Review	Action
<a href="#">PN000052738</a>	asdf	asdf	15/11/2017	BRONZE	✓	Not required ✓	Later ✓	Confirm	Approve
<a href="#">PN000124522</a>	Testovaci	DofE	06/09/2017	BRONZE	✓	Not required ✓	Later ✓	Confirm	Approve

20 per page

## 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. It is also accessible from the side menu bar selecting 

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

Registration (3)	Activity Approval (8)	Section Sign-off (1)	Adventurous Journey (3)	Award Sign-off	Unassigned Participants (2)
------------------	-----------------------	----------------------	-------------------------	----------------	-----------------------------

Email Confirmation	Parent Approval	Payment State	<a href="#">Filter</a>
Select	Select	Select	

ID	First Name	Last Name	Registration Date	Level	Email Confirmation	Parent Approval	Payment	Review	Action
----	------------	-----------	-------------------	-------	--------------------	-----------------	---------	--------	--------

- **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”.

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.
3. 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 it is not valid, you can delete it by pressing the  button.

ID	First Name	Last Name	Registration	Level	Email	Delete	Assign
<a href="#">P000000038</a>	Paloma	Ford	16/03/2017	BRONZE	testaward00+5@gmail.com	<a href="#">Delete</a>	Assign John Casey (me) X ▾ <a href="#">Assign</a>

- **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 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  .

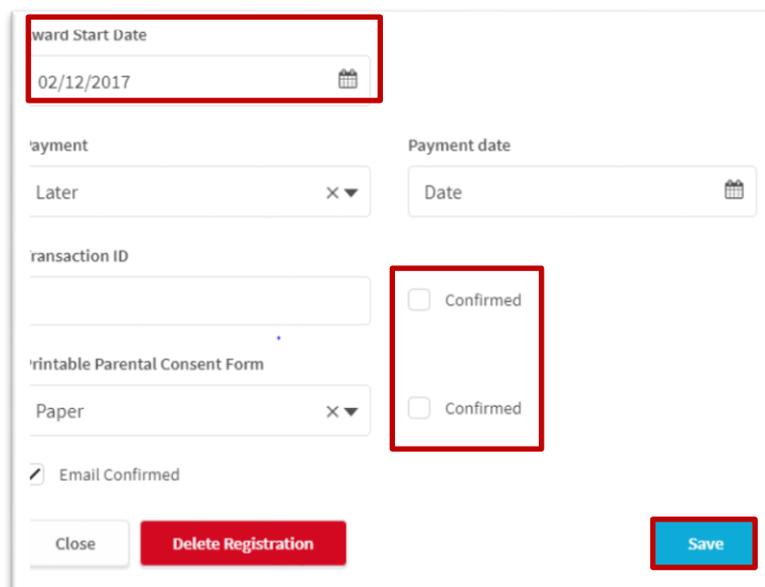
- Please note, if parental consent has been delivered via email and the email address has already been confirmed by the participant the boxes will be automatically ticked.
- From the pop up box modify the necessary details and ✓ as confirmed.

Resend parental consent

- To resend any the parental consent email click on  
This option will only be visible if the delivery confirmed box is left unchecked
- 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



Award Start Date: 02/12/2017

Payment: Later | Payment date: Date

Transaction ID: [Empty]

Printable Parental Consent Form: Paper

Confirmed

Confirmed

Email Confirmed

Buttons: Close, Delete Registration, Save

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

Delete registration

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

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

- 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.

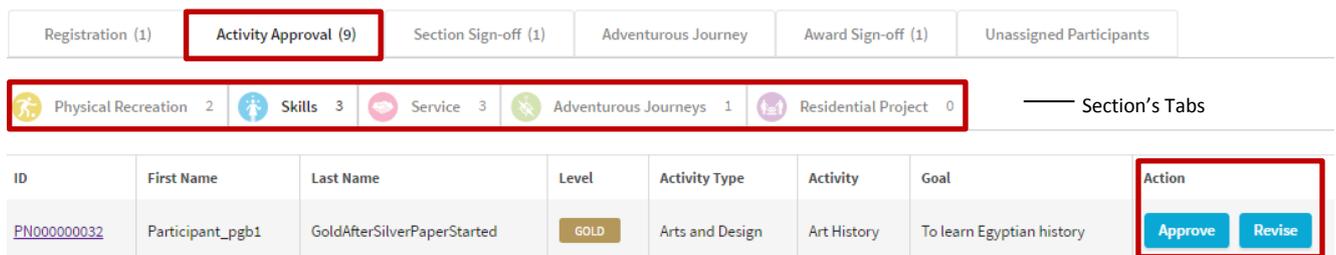
Participants are not able to save activity logs set before their Award start date.

- **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

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



The screenshot shows a navigation bar with tabs: Registration (1), Activity Approval (9), Section Sign-off (1), Adventurous Journey, Award Sign-off (1), and Unassigned Participants. Below this is a 'Section's Tabs' bar with icons for Physical Recreation (2), Skills (3), Service (3), Adventurous Journeys (1), and Residential Project (0). The main table lists activities with columns for ID, First Name, Last Name, Level, Activity Type, Activity, Goal, and Action. A red box highlights the 'Action' column for the first row, which contains 'Approve' and 'Revise' buttons.

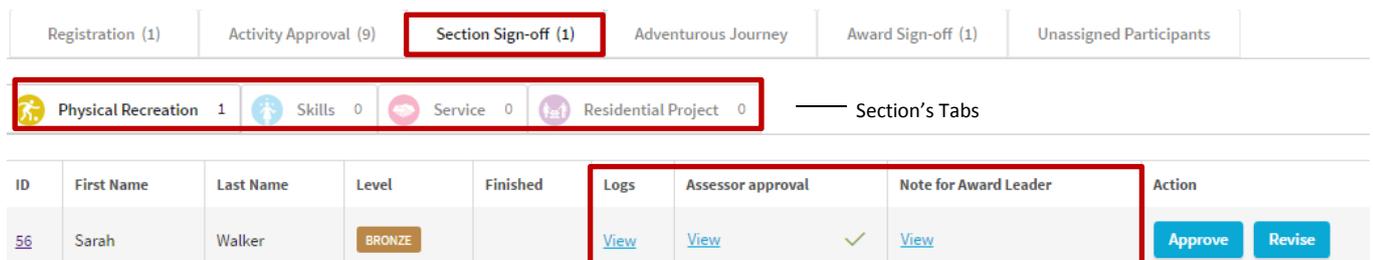
ID	First Name	Last Name	Level	Activity Type	Activity	Goal	Action
<a href="#">PN000000032</a>	Participant_pgb1	GoldAfterSilverPaperStarted	GOLD	Arts and Design	Art History	To learn Egyptian history	Approve Revise

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
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



The screenshot shows a navigation bar with tabs: Registration (1), Activity Approval (9), Section Sign-off (1), Adventurous Journey, Award Sign-off (1), and Unassigned Participants. Below this is a 'Section's Tabs' bar with icons for Physical Recreation (1), Skills (0), Service (0), and Residential Project (0). The main table lists sections with columns for ID, First Name, Last Name, Level, Finished, Logs, Assessor approval, Note for Award Leader, and Action. A red box highlights the 'Logs', 'Assessor approval', and 'Note for Award Leader' columns for the first row, which contain 'View' links and a checkmark.

ID	First Name	Last Name	Level	Finished	Logs	Assessor approval	Note for Award Leader	Action	
<a href="#">56</a>	Sarah	Walker	BRONZE		<a href="#">View</a>	<a href="#">View</a>	✓	<a href="#">View</a>	Approve Revise

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

- **Review and approve/ask for revision Adventurous Journey section**

The Adventurous Journey section is divided into three parts: Preparation and Training, Practice Journey and Qualifying Journey. Each part of the Adventurous Journey needs to be approved separately.

1. From the To-Do List select “Adventurous Journey”
2. Click on the tabs displayed below to find the Journeys waiting for approval
3. Click on ‘View’ to review the Adventurous Journey details and its evidences
4. Review the Journey details and evidences
5. Click on “Approve” or “Revise” as necessary

Registration (9)	Activity Approval (13)	Section Sign-off (1)	Adventurous Journey (5)	Award Sign-off (3)	Unassigned Participants (3)		
Preparation 1	Practice 3	Qualifying 1					
ID	First Name	Last Name	Finished	Adventurous Journey Detail	Observations	Assessor approve	Action
20	Violet	Silver		<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>	<input type="button" value="Approve"/> <input type="button" value="Revise"/>

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

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

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

1. From the To-Do List select “Award sign-off”
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

Detail	Bronze Level	Silver Level	History Log	Details and ‘Award Level’ tab			Award detail and Section tabs
Award Details	Physical Recreation	Skills	Service	Adventurous Journey	Documents		Add Activity
Registration Assessment	Registration Approval	Setup	In Progress	Award Leader Sign-off	Award Office Sign-off	Completed	Ceremony
ID	First Name	Last Name	Email				Action
PN000	Name	Saley	Name@gmail.com				<input type="button" value="Approve"/> <input type="button" value="Revise"/>

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

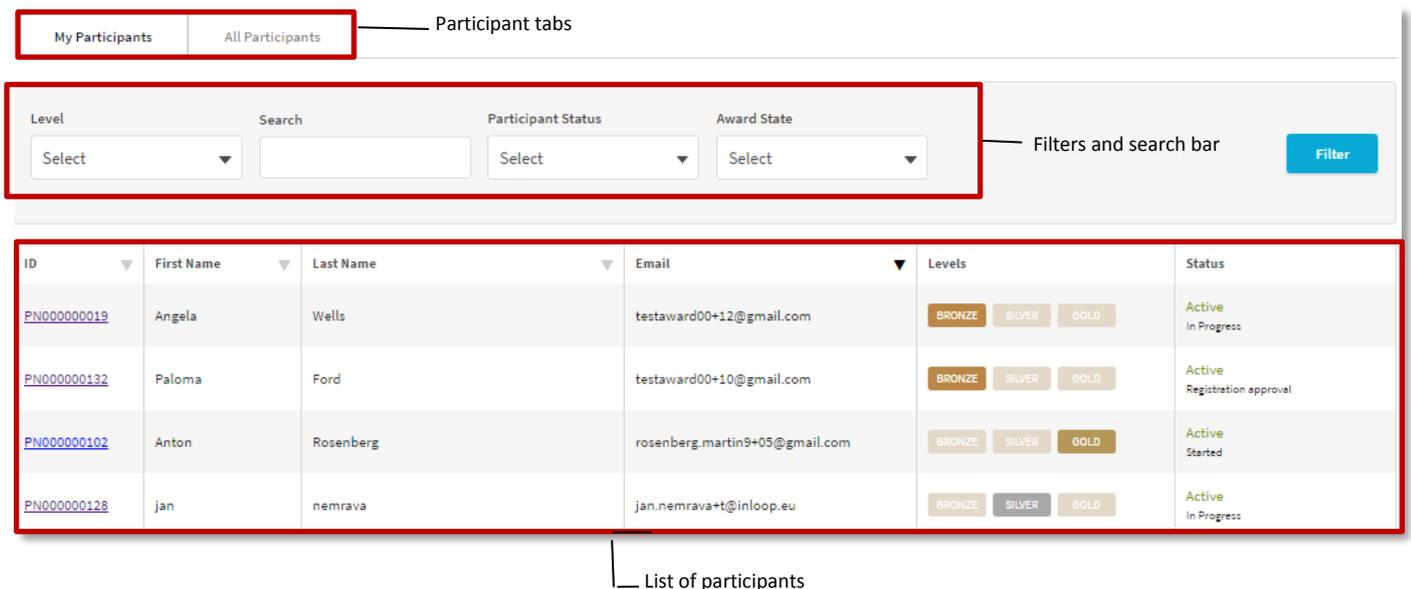
## Managing your participants

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 settings set by their National Operator/Regional Office.

- **Browsing a participant's details:**

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



The screenshot shows the 'Participants' management interface. At the top, there are two tabs: 'My Participants' and 'All Participants'. Below the tabs is a search and filter bar with dropdown menus for 'Level' (set to 'Select'), 'Participant Status' (set to 'Select'), and 'Award State' (set to 'Select'). A search input field and a 'Filter' button are also present. The main area displays a table of participants with columns for ID, First Name, Last Name, Email, Levels, and Status.

ID	First Name	Last Name	Email	Levels	Status
<a href="#">PN000000019</a>	Angela	Wells	testaward00+12@gmail.com	BRONZE SILVER GOLD	Active In Progress
<a href="#">PN000000132</a>	Paloma	Ford	testaward00+10@gmail.com	BRONZE SILVER GOLD	Active Registration approval
<a href="#">PN000000102</a>	Anton	Rosenberg	rosenberg.martin9+05@gmail.com	BRONZE SILVER GOLD	Active Started
<a href="#">PN000000128</a>	jan	nemrava	jan.nemrava+tt@inloop.eu	BRONZE SILVER GOLD	Active In Progress

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.

- Participant Profile Overview

**Shari Cooper**  
Participants / Detail

 Award Leader1 InAlbanyPark  
Albany Park Sailing Centre

Detail
Bronze Level
History Log



Upload picture

**Title**  
Mrs. x

**First Name**  
Shari

**Last Name**  
Cooper

**Email**  
testaward00+6@gmail.com Change

**Phone Number** Phone Type  
+442000000000 Home x

**Date of Birth**  
01/06/2000 📅

**Note**

**Overview** Account Settings v

Age 17	Organisation Albany Park Sailing Centre	Registration Date 20/06/2017	State Active
-----------	--	---------------------------------	-----------------

**Level**  
BRONZE
SILVER
GOLD

**Leader** Change

Name Award Leader1 InAlbanyPark	Email dofeuat+a1@gmail.com	Phone Number 0900 0000000
------------------------------------	-------------------------------	------------------------------

**Payment**

Form of Payment Paid <span style="float: right;">x</span>	Date of Payment 20/06/2017 <span style="float: right;">📅</span>
--	--

Transaction ID  
XCVBNN  Payment Confirmed

**Address**

Address First Line  
London

Address Second Line

State/Province/Region  
London

City  
London

Post Code  
London

Country  
UK x

**Parent / Guardian Consent**

Printable Parental Consent Form Paper <span style="float: right;">x</span>	Parent's relationship Father
First name of Parent / Guardian John	Last name of Parent / Guardian Casey
Parent's / Guardian's Email testaward00@gmail.com	Parent's / Guardian's Phone Number +442000000000

Date of Delivery  
Date 📅  Delivery Confirmed

**Other Information**

Nationality  
British x

Gender  
Female x

Employment Status  
Student x

Previous Level (not ORB)  
Select v

Where

Bronze Level Registration Date  
04/07/2017 📅

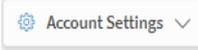
Bronze Level Start Date  
01/07/2016 📅

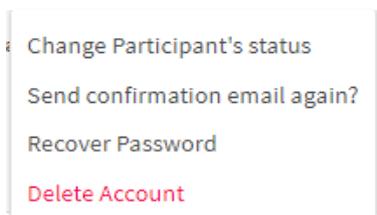
- **Edit a participant's personal details**

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.

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

- **Edit your participant's account settings**

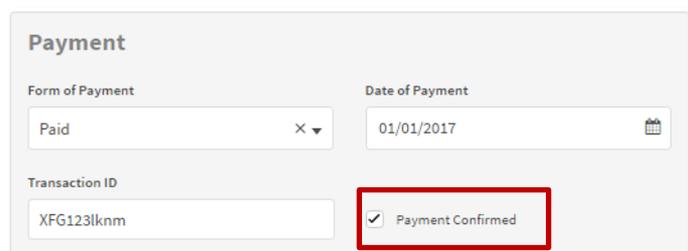
Once you have navigated to a participant's profile, choose the option  to make any modifications such as:



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

- **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.



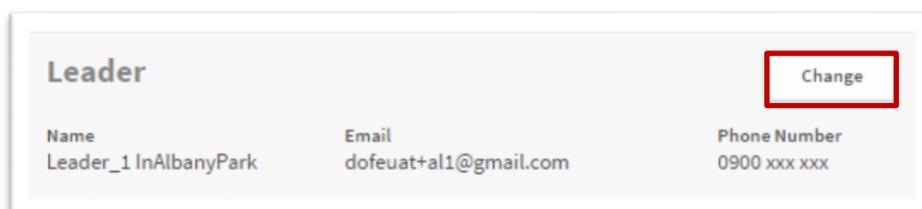
The form is titled "Payment" and contains the following fields:

- Form of Payment: Paid (dropdown menu)
- Date of Payment: 01/01/2017 (calendar icon)
- Transaction ID: XFG123lknm
- Payment Confirmed:  (highlighted with a red box)

- **Change of Award Leader**

To change a participant's Award Leader:

1. Navigate to the participant's profile
2. From the tab "Leader" click on 'Change'



The card is titled "Leader" and contains the following information:

- Name: Leader\_1 InAlbanyPark
- Email: dofeuat+al1@gmail.com
- Phone Number: 0900 xxx xxx
- Change button:  (highlighted with a red box)

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

4. Press "Change" to save your new settings

ID	First Name	Last Name	Email
11	Leader_1	InAlbanyPark	dofeuat+al1@gmail.com
32	John	Casey	testaward00+3@gmail.com

- **Award Details Overview**

Detail **Bronze Level** Silver Level History Log

Award Details **Physical Recreation** Skills Service Adventurous Journey Documents — Award Sections

Setup Approval In Progress Assessor Approval Award Leader Sign-off Award Office Sign-off **Completed** Ceremony Inactive

**Assessor Details**

Title	Name	Email	Phone	State
Mr	Karate Man	awardtest68+4@gmail.com	---	---

Assessor approve  Assessor report [View](#)

**Activity Detail** 29 / 26 h

Activity Type: Martial Arts / Self Defence

Activity: Karate

Goal: to achieve a black belt

Major

**Logs**

01/10/2017	4 hours 0 minutes	Created at: 24/10/2017 09:39
ydk		
01/09/2017	4 hours 0 minutes	Created at: 24/10/2017 09:39
stj		
01/08/2017	4 hours 0 minutes	Created at: 24/10/2017 09:39
fa		
01/07/2017	4 hours 0 minutes	Created at: 24/10/2017 09:38

- **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

- **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.

Change any participant details and click on the



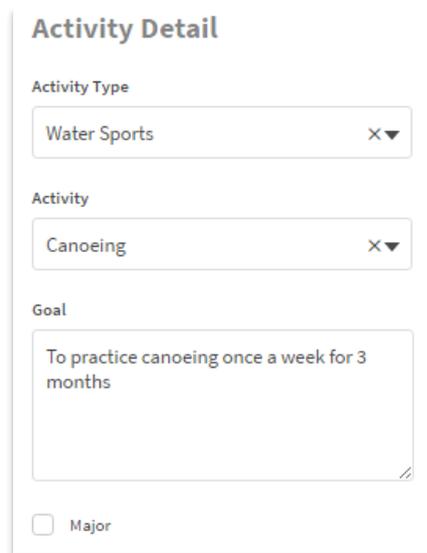
Save

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

- **Setting up 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 Activity Type and Activity from the drop down lists available.



**Activity Detail**

Activity Type  
Water Sports x▼

Activity  
Canoeing x▼

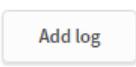
Goal  
To practice canoeing once a week for 3 months

Major

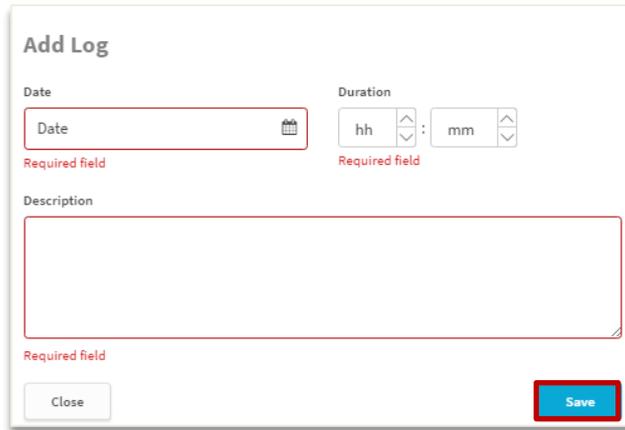
3. Press  at the bottom of the page to save your changes

- **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  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

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



**Add Log**

Date:   Required field

Duration:  :  Required field

Description:  Required field

- **Change logs on behalf of a participant**

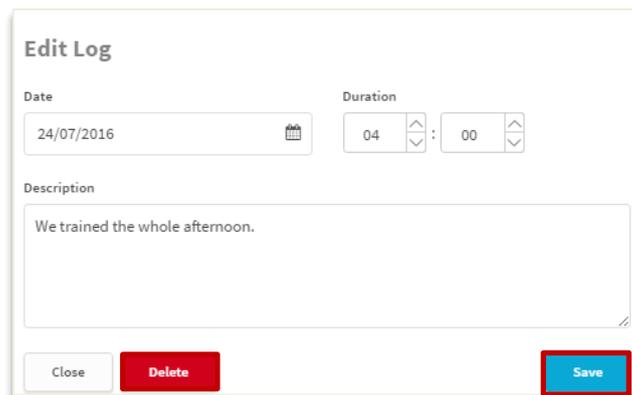
To edit a log:

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

- **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:   Required field

Duration:  :  Required field

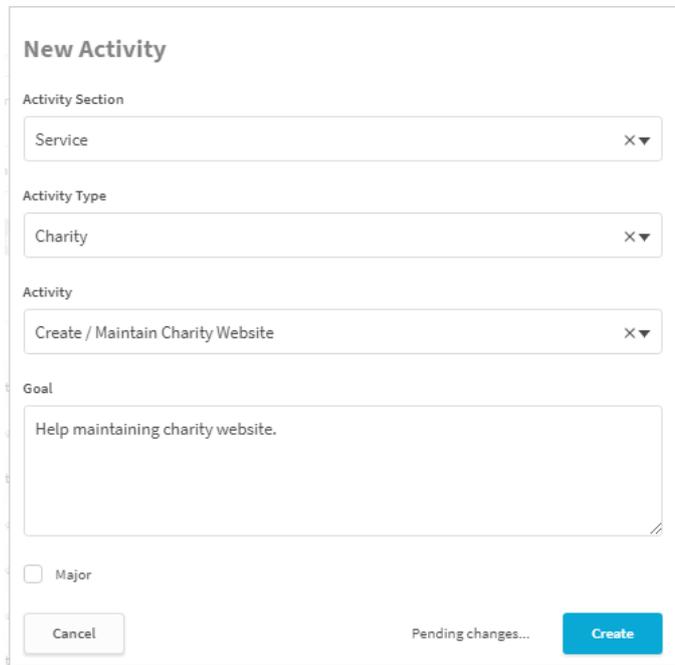
Description:

- **Setting up multiple activities on behalf of a participant**

To set up multiple activities on behalf of a participant:

1. Navigate to the participant's Award Section
2. Click on

3. Select Activity Section, type and category from drop down list available
4. Insert the Goal of the activity.



**New Activity**

Activity Section  
Service

Activity Type  
Charity

Activity  
Create / Maintain Charity Website

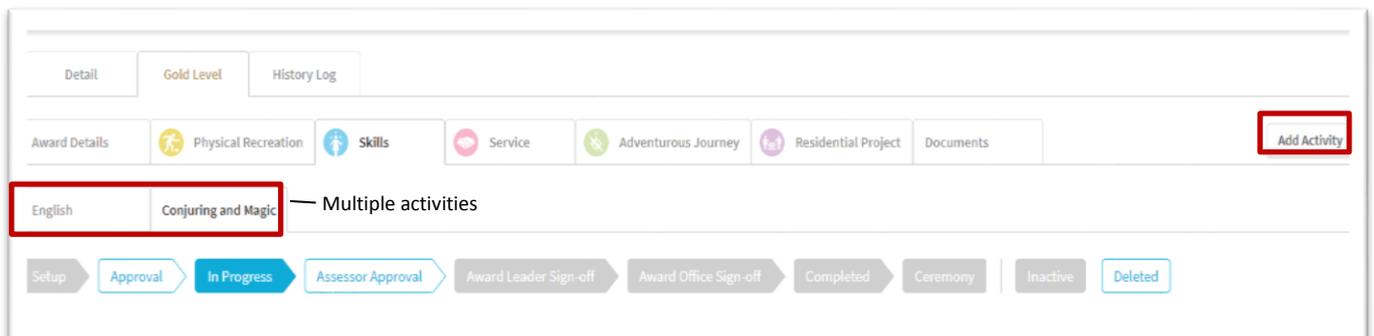
Goal  
Help maintaining charity website.

Major

Cancel Pending changes... Create

5. Click on **Create** to create a new activity.

The new activity will be displayed on screen under the chosen section.



Detail Gold Level History Log

Award Details Physical Recreation Skills Service Adventurous Journey Residential Project Documents **Add Activity**

English **Conjuring and Magic** — Multiple activities

Setup Approval **In Progress** Assessor Approval Award Leader Sign-off Award Office Sign-off Completed Ceremony Inactive Deleted

**Note: A maximum of 3 activities per Section is permitted.**

- **Delete/Restore activities on behalf of a participant**

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

To delete an activity:

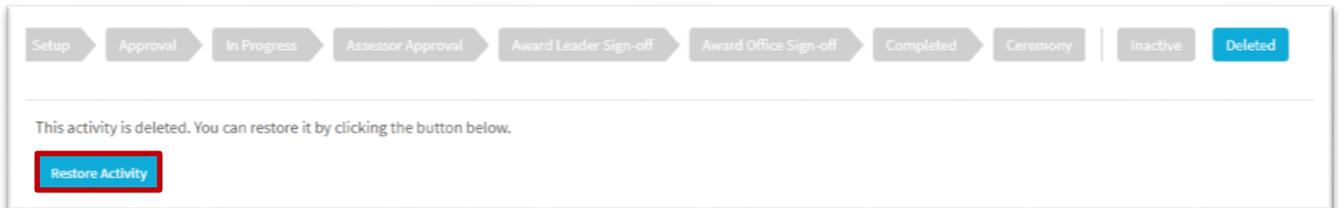
1. Navigate to the participant's Award Section
2. From the Section tab select the Activity you would like to delete
3. From the flow-bar click on **Deleted**

4. Confirm your choice.

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

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

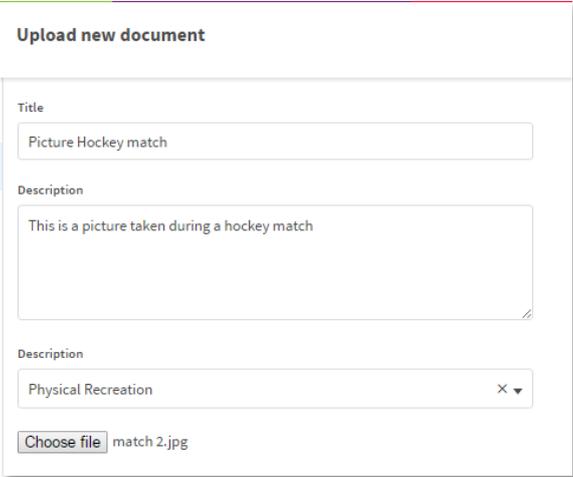
[Restore Activity](#)



- **Add a document on behalf of a participant**

To add a document to the participant's Award:

1. Click on the [Documents](#) tab
2. Click on [Create new](#)
3. Insert Title and description
4. Select the activity the document refers to from the dropdown list available
5. Choose file and click on [Upload](#) at the bottom of the page



- **Track a participant's history**

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

1. Click on the tab [History Log](#) within the participant's profile
2. The participant's history will be then displayed

Example history

Detail		Bronze Level	History Log
Date	Description		
04/05/2017	is1-IAF-Superuser Staff1is1-IAF-Superuser Staff1 has approved the App Design activity of Sarah Walker participant.		
04/05/2017	is1-IAF-Superuser Staff1is1-IAF-Superuser Staff1 did not approve the Netball activity of Sarah Walker participant.		
04/05/2017	Sarah WalkerSarah Walker requested signoff of the ajPreparationAndTraining of Sarah Walker participant.		

- **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

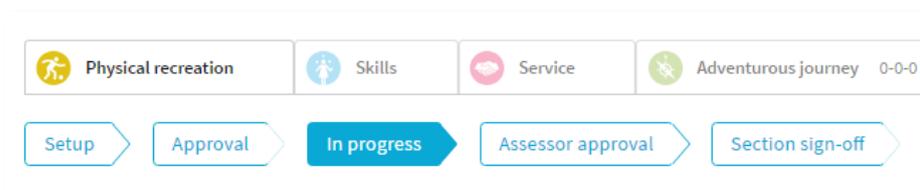
- **Submitting a section on behalf of a participant**

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).

(b) Approval via the To-Do List

Registration (1)	Activity Approval (8)	Section Sign-off (1)	Adventurous Journey (1)	Award Sign-off	Unassigned Participants
------------------	-----------------------	----------------------	-------------------------	----------------	-------------------------

Physical Recreation 1	Skills 0	Service 0	Residential Project 0
-----------------------	----------	-----------	-----------------------

ID	First Name	Last Name	Level	Finished	Logs	Assessor approval	Note for Award Leader	Action
<a href="#">56</a>	Sarah	Walker	BRONZE		<a href="#">View</a>	<a href="#">View</a> ✓	<a href="#">View</a>	<a href="#">Approve</a> <a href="#">Revise</a>

(c) Approval via the workflow bar

Award Details	Physical Recreation	Skills	Service	Adventurous Journey	Documents	Add Activity
---------------	---------------------	--------	---------	---------------------	-----------	--------------

Setup	Approval	In Progress	Assessor Approval	Award Leader Sign-off	Award Office Sign-off	Completed	Ceremony	Inactive
-------	----------	-------------	-------------------	-----------------------	-----------------------	-----------	----------	----------

Finished	Action
05/03/2018	<a href="#">Approve</a> <a href="#">Revise</a>

- **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

Registration (2)	Activity Approval (8)	Section Sign-off (1)	Adventurous Journey	Award Sign-off (1)	Unassigned Participants
------------------	-----------------------	----------------------	---------------------	--------------------	-------------------------

ID	First Name	Last Name	Previous Level	Current Level	Registration Date	Note	Action
<a href="#">56</a>	Sarah	Walker	-	BRONZE SILVER GOLD	12/04/2017	<a href="#">View</a>	<a href="#">Approve</a> <a href="#">Revise</a>

(b) Approval via the workflow bar

Detail	Bronze Level	Silver Level	History Log
--------	--------------	--------------	-------------

Award Details	Physical Recreation	Skills	Service	Adventurous Journey	Documents	Add Activity
---------------	---------------------	--------	---------	---------------------	-----------	--------------

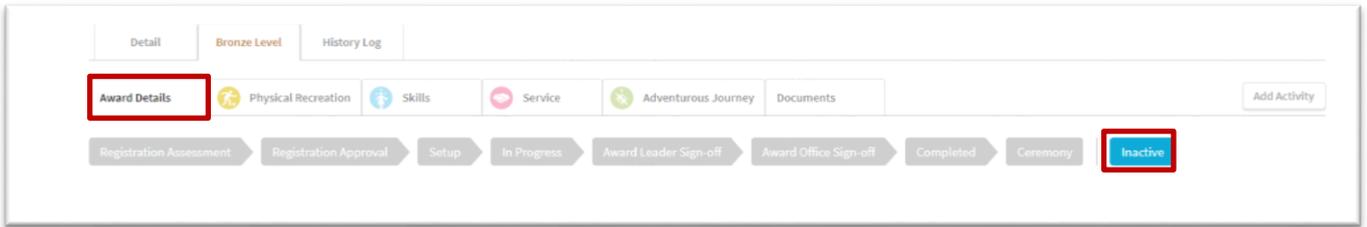
Registration Assessment	Registration Approval	Setup	In Progress	Award Leader Sign-off	Award Office Sign-off	Completed	Ceremony	Inactive
-------------------------	-----------------------	-------	-------------	-----------------------	-----------------------	-----------	----------	----------

ID	First Name	Last Name	Email	Action
<a href="#">PN0001</a>	Name	Name	Name@yahoo.co.uk	<a href="#">Approve</a> <a href="#">Revise</a>

- **Mark a participant as Inactive**

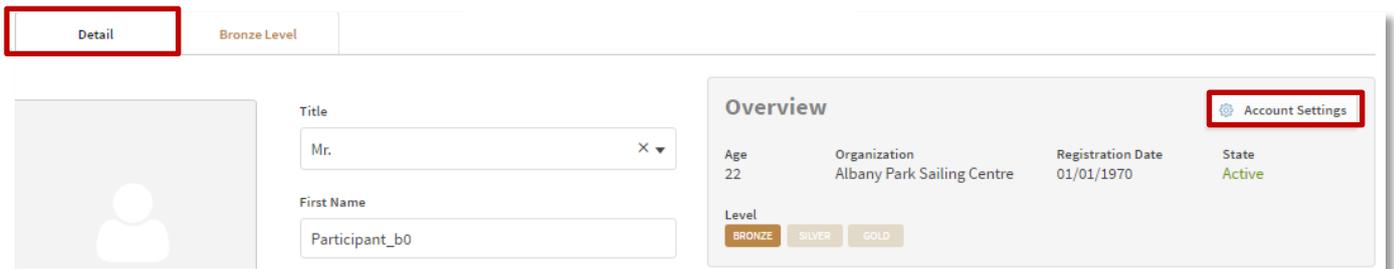
As an Award Leader you can mark a participant's Award as inactive by navigating to their Award. From the workflow bar displayed in the Award detail tab, click on the option 'Inactive'



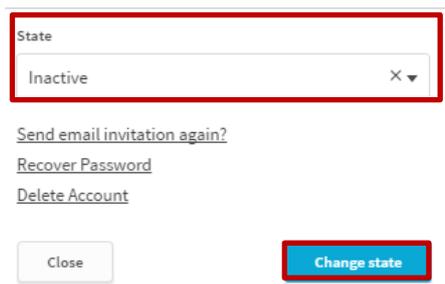
To deactivate a participant's account:

1. Navigate to the participant's profile details tab (a)
2. Click on 'Account Settings' in Overview tab (a)
3. Change the status to 'Inactive'
4. Click on 'Change state'

(a) Award Details Overview



(b) Pop-up



## 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

AJ tabs: My Events, All Events, Adventurous Journey Templates

Action buttons: New Template, New Adventurous Journey Event

Filters: Search, Journey Category, Journey Type, Filter

Number of records: 0

ID	Name	Journey Category	Journey Activity	Journey Type	Award Unit	Start Date	End Date	Created by	Participants
----	------	------------------	------------------	--------------	------------	------------	----------	------------	--------------

- **Creating a new Adventurous Journey Event**

To create a new Adventurous Journey Event:

1. Select  Adventurous Journey from the menu
2. Select "New Adventurous Journey Event"
3. Add all details of Journey and give the AJ a name to make it identifiable to you and your participants
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 
4. Click on the button  displayed on the right
5. A list of suitable participants will be presented in a list. Select those you wish to invite.  
*You can narrow the selection of participants by typing in their names*
6. Click 'Set participants' to save your changes

Search by email, first or last name

Start typing... 

56	Sarah	Walker	testaward00@gmail.com	BRONZE	
16	Participant_b0	BronzeStarted	dofeuat+pb0@gmail.com	BRONZE	
62	Betty	Letty	testaward00+2@gmail.com	BRONZE	

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.

- **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

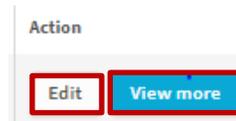


3. Click on

4. In the pop up, give the file a title and description and search for the document you wish to upload

5. Select 

6. You can view, edit and delete files by selecting



- **Deleting an Adventurous Journey Event**

To delete an Adventurous Journey:

1. Navigate to the Adventurous Journey you would like to modify

2. Click on 

3. From the pop-up click on 'Remove' and confirm your choice



- **Creating a new Adventurous Journey template**

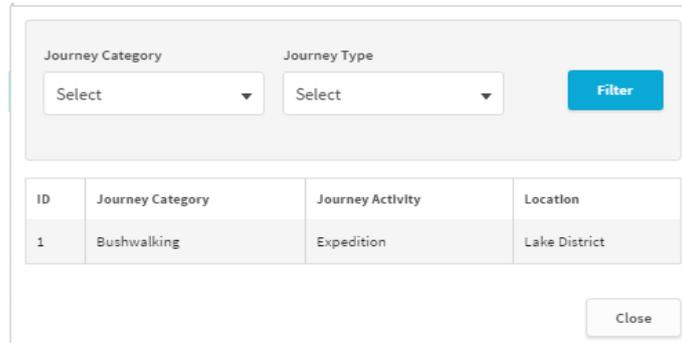
To create a new Adventurous Journey Event:

1. Select  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  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

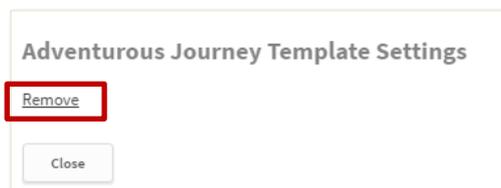


ID	Journey Category	Journey Activity	Location
1	Bushwalking	Expedition	Lake District

- **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



## My Organisation Overview

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

Organisation Details
Contacts
Payment
— Organisation tab



Name  
Albany Park Sailing Centre

Type  
Independent School

Phone Number  
+4207777277203

Fax  
+933023223

Website

Facebook

International Region Europe, Mediterranean, Arab States (EMAS)	National Award Authority NAO_UK
Created at 19/06/2017	Active Participants 43
Total Participants 44	Active Leaders 6

**Authorising Contact** Change

First Name Violet	Last Name Davi
Email testaward00+unit2@gmail.com	Phone +442000000000

**Coordinators** Add coordinator

First Name Violet	Last Name Davi	✕
Email testaward00+unit2@gmail.com	Phone +442000000000	

**Billing Address**

Address First Line  
St Anne's Road

Address Second Line  
line2 4174/6

State/Province/Region  
London

City  
London

Post Code  
234

**Shipping Address** Same as Billing

Address First Line  
St Anne's Road

Address Second Line  
line2 4174/6

State/Province/Region  
London

City  
London

Post Code  
234

- **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

*Authorising contact / coordinator details*

**Authorising Contact** Change

First Name Violet	Last Name Davi
Email testaward00+unit2@gmail.com	Phone +442000000000

**Coordinators** Add coordinator

First Name John	Last Name Casey <span style="float: right; color: red;">✕</span>
Email testaward00+222@gmail.com	Phone +442000000000

Pop-up

Organisation contact

Award Leader1 InAlbanyPark <dofeuat+al1@gmail.com>
✕

Close
Set

To add multiple coordinators click on the Add coordinator option displayed and select the organisation you would like to add the coordinator to.

- Contacts List Overview

Organisation Details
Contacts

New Contact

Search bar
Filter

ID	First Name	Last Name	Email	System Rights
AL000000012	Award Leader1	InAlbanyPark	dofeuat+al1@gmail.com	Leader
AL000000077	Yogesh Sharma	Leader	orb.nextgen@intaward.org	LeaderAward VerifierAdventurous Journey AssessorInstructor
89	John	Casey	testaward00+222@gmail.com	Award VerifierAdventurous Journey Assessor

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 (a)
4. Click on Create to finish creating your new contact

(a) Contact information

1. The new contact details page will be displayed
2. Click on  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

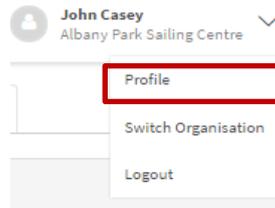
(c) Add role pop-up

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

## 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.



[Change password](#)

### Personal Details



Profile picture

[Upload picture](#)

Title  
Mr. x v

First Name  
Award (TEST)

Last Name  
Leader

Email  
plcal@tifisu.co.uk [Change](#)

Secondary email

Phone Number  
+441234567890 Phone Type  
Mobile x v

Secondary phone number  
+ Secondary phone type  
Select v

Date of Birth  
01/10/2000 📅

### Address

Address First Line  
Address

Address Second Line

State/Province/Region  
State City  
City

Post Code  
Zip Country  
Australia x v

Nationality  
Select v

Language Settings  
English (United Kingdom) x v

[Add training](#)

Basic training  
Expeditionary training  
Leadership of participants

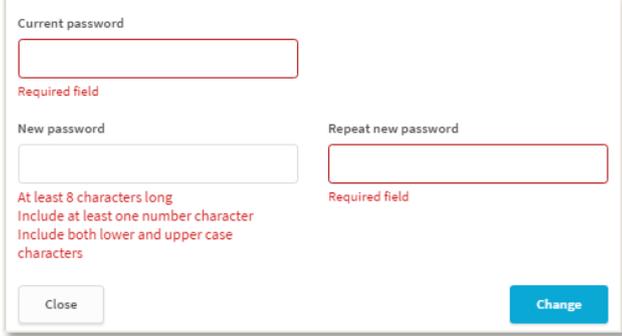
[Add history record](#)

Al Khor International School  
01/10/2008 - 01/10/2012

1. To make any changes to your personal details, 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  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



Current password  
  
 Required field

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

Repeat new password  
  
 Required field

[Close](#) [Change](#)

To update your language settings:

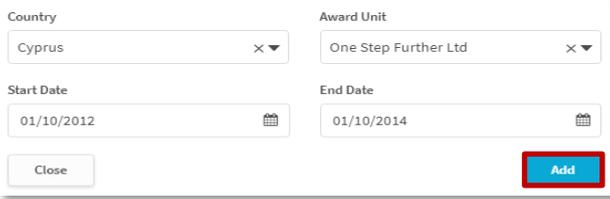
1. Navigate to your profile page
2. Select your language from the drop down 'Language Settings'
3. Click on [Save](#) to save your settings

To update your Trainings:

1. Click on 'Add Training'
2. Insert Training name and date
3. Press [Save](#) to save your changes

To add any history record:

1. Click on 'Add history record'
2. Select the Country and the Award Unit you were part of
3. Insert the start and end date of your collaboration with that Unit.
4. Click 'Add' to save your history



Country

Award Unit

Start Date

End Date

[Close](#) [Add](#)

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

User guides available to Award Leaders:

[User app guide - Award Leader](#)

[User web guide - Award Leader](#)

[User web guide - Participant](#)

[User app guide - Participant](#)

[Frequently Asked Questions \(FAQs\)](#)