

ORB update 2.12: Participant labels – Available now

Upcoming update 2.13: Estimated for release on/around 19 December

The following notes relate to two releases on the ORB, 2.12 and 2.13. There is one big change to the ORB with release 2.12, which is the addition of participant labels. This has been funded and developed as part of the *Stand By Me* project and, related to the timings of this project, has been added to the ORB already. However, for most operators it is hidden from view. You can request to turn the labels on if and when needed (see item 1., below). In addition to the labels, we are also using these release notes to confirm the updated user guides for Award Leaders and to promote a consultation around the participant's Award Summary.

The second release, 2.13, is due the week commencing 19 December. This is short notice but, as most changes here will not immediately or obviously impact on Award Leaders and it is a relatively quiet period, we feel that it is a good time to push the release onto the ORB. Although most testing has taken place already, you are able to view the changes in the TEST ORB (<https://dofectest.okin.eu/fo/>)

With release 2.13, in the week before we will confirm the date and any downtime expected, as well as confirm all of the changes included (there may be some additional fixes/minor changes included).

As with most releases, there are new translations to review in POEditor ([guidance for which is here](#)). We will update languages on to the ORB with the 2.13 release, but please get in touch if you would like new translations updated before then.

If you have any questions about these releases, please do let me know.

Best wishes,

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Changes with release 2.12 (available now)

1. [Assigning labels to participants](#)

2. [New activity categories under: Voluntary Service / Voluntary Service to Other People](#)

3. [Updated Award Leader \(ORB web\) User Guides](#)

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1. Assigning labels to participants

The label function is not automatically provided. Please let me know if you would like this function switched on or if you would like a demonstration of the labels in action. (peter.orrey@intaward.org).

Context: Award Leaders need ways to be able to organise their participants to suit whatever their requirements are locally. For example, they may want to be able to quickly find all participants belonging to a particular cohort or group. Larger Award Centres, in particular, can find overall participant management a challenge.

Solution: The ability for Award Leaders to create and assign labels to participants.

NAOs are also able to create labels which Award Leaders can assign to their participants. The participant labels function is designed primarily as a tool for Award Leaders and so they maintain control over which labels to assign to their participants. Award Leaders can also remove labels when needed.

The user guides (see below) have been updated to include an overview of the labels function for Award Centres. [This information also appears in the following overview, which also includes brief guidance for NAOs.](#)

This development was prioritised in order to support the *Stand By Me* project, which is being run by the NAOs of Romania, Slovakia and Czech Republic. Because of this, the Stand By Me project has funded this development.

Labels now appear in the following reports: Participant Award Progress, Award Completion, Current Active Award and Participants Including Payment status, Voluntary Services Summary Report

The screenshot shows the 'My Participants' page for Miss Plum (AL000109931). The interface includes a search bar, filter options for Level, Participant Status, Award State, and Award Leader, and a 'Label' dropdown menu. A table lists participants with columns for ID, Name, Email, Levels, Last log added, Labels, Award Leader, and Status. Annotations highlight the 'Label' dropdown, the 'Bulk action' menu, and the 'Export Table' button.

ID	First Name	Last Name	Email	Levels	Last log added	Labels	Award Leader	Status
PH001260268	Barnacle	Beasley	orb.support+9@intaward.org		No logs	Label 3 Year 9 first group	Miss Plum	Current Setup
PH001602689	Bitzer	Maloney	orb.support+1@intaward.org		No logs	Label 2 Label 3 Defeat A until 2023 Year 9 second group	Miss Plum	Current In Progress
PH001397764	Greywacke	Jones	orb.support+13@intaward.org		No logs		Miss Plum	Current Setup
PH001367305	Grizzly	Macduff	orb.support+11@intaward.org		No logs	Operator created Award Centre created	Miss Plum	Current Registration Authorisation

Translations: There are translations relating to the labels and these should be updated by your relevant team member on POEditor. [Guidance on translations is here.](#)

Next steps (to be agreed/confirmed):

- Labels to be customised (to be turned on/off) at (Sub)Operating Partner and Award Centre level
- Show labels on the registration tab
- Change so that Award Centre labels can only be created by coordinators (possible customisation)
- Bulk removal of labels (by NAO/OP or coordinator only)
- Labels for Award Centres, for NAO / OP use (Award leader labels also?)

2. New activity categories under: Voluntary Service / Voluntary Service to Other People

To support the *Stand By Me* programme, three activities have been added to the *Voluntary Service to Other People* activity type in the *Voluntary Service* section.

- *Czech / Romanian / Slovakian Buddy*
- *Ukrainian Buddy*

The above two are available now on the ORB, with the following being added with the 2.13 release (w/c 19 December):

- *Volunteering in a refugee crisis*

3. Updated Award Leader (ORB web) User Guides

Updated user guides for Award Leaders and Participants, for the web version of the ORB, have been added to the ORB.

You will not need to take any action as users will automatically see the latest versions from their ORB accounts. However, if you have updated a translated/adapted version of the guides then you will need to update/translate accordingly.

Both guides are available, [here, on the Award Community.](#)

The Award Leader guide is quite long and should be seen more as a reference rather than for reading in one-go. The aim with ORB guidance is to eventually move to bite-size information within the ORB or on the Award Community or YouTube (for example, for participant training videos). We will be starting this approach with an update to the Apps guidance (though this is unlikely to be in place until mid-2023).

Thank you to Donna Dupuy for compiling most of these documents and to those of you who provided feedback.

To consider/next steps:

- The ORB course on the Award Community is in the process of being updated and will be available very soon.
- Please get in touch if need to translate the guidance.
- From now on, each release will include (when relevant) an update to the guidance and training, so that it is always kept up to date.
- The App guides will be updated next year, as a series of short videos.
- The NAO guide will not be updated as one guide, but training and guidance will be provided on the Award Community, specifically for Operators (again, likely to be available mid-2023).

4. Award Summary consultation

With release 2.11, we updated the Award Summary that participants and Award Leaders can download. There are now two documents available to download: a one-page Award Summary and the Award detail. Though these are an improvement on the previous version, there are still more developments we can make to ensure these documents are as useful as possible for participants. Please [consider/add your feedback here](#) by Tuesday 17 January.

Examples are as follows:

[Award Summary](#)

[Award Detail](#)

Changes with release 2.13 (available w/c 19 December)

5. Automatically archive participants after a specified number of days of inactivity

Although part of release 2.11, this change has now been tested in the Production ORB and will be available for NAOs upon request with release 2.13. Please let me know if you would like this function switched on (peter.orrey@intaward.org)

Context: Where Award Centres have not regularly reviewed participant lists to archive those who are inactive, the list of participants that Award Leaders need to administer can feel overwhelming (particularly with larger Award Centres).

Solution: A customisation which enables auto-archiving of participants based the amount of time (in days) without any activity when an Award is in the following states:

- Setup
- Completed
- In Progress

The customisation is available in a new tab: *Participant Archiving*.

Considerations with this change:

- The count of days without activity is based on participant activity and not the Award Leader actions for a participant. For example, if a participant submitted an Award to their Award Leader on 1 August, and the Award Leader sent it to the Award Office for final approval on 10 August, the archiving would count 1 August as the date of the last activity.
- To support auto-archiving, an email has been set up that will be sent to the participant as advance notification. The number of days before the archiving is due to take place that the email will be sent can be customised (see image, above). The email is available under the *Emails* tab and will need to be written before Auto-Archiving is turned on. In this email, you might want to prompt the participant to restart their Award or to start the next Award Level (if they have completed the previous level). Participants receiving the email to notify them that their ORB account is about to be archived need only click on the link in the email to reset the archiving timer.
- The automatic email and the archiving will happen once a week and is usually set up to happen on Sundays.
- When a participant is auto-archived, it appears on the Award Centre's history logs
- A limit has been set so that auto-archiving cannot take place less than 100 days after participant activity.
- Those participants who are 'semi-offline' are not in scope for auto-archiving (as they are not required to do any activity on the ORB).
- Mimicking a participant might reset the archiving period, depending on the action: If when mimicking you undertake an action as the participant, then it will reset the archiving time. However, if you just login and have a look around without any action, then it will not reset.
- Archiving participants does not impact on Annual statistics (only records from deleted participants are excluded).
- Not all reports include archived participant data (the notes/updates of each report will highlight if it does).

Next steps:

- The customisation for auto-archiving will be available to view but the ability for NAOs to change the parameters will be removed. Considered action around the timing and frequency of changing the parameters is needed and support will be given by the Digital Programmes Manager or OKIN.
- A report will be added for you to quickly identify archived participants
- Customisation for Auto-Archiving to be added at a Sub/Operating Partner and Award Centre level
- Push notification of archiving to App users will be added with release 2.13

6. Self-service support tools for NAOs

Context: There are a group of common queries about the ORB where it has only been possible for OKIN to action. These include the merging of duplicate participant accounts and the deletion of Award levels.

Solution: A self-service support menu item, giving NAOs the ability to carry out actions themselves.

These tools are only available to those NAO staff who have permissions to edit customisations.

The screenshot shows a web application interface with a sidebar on the left containing navigation items: Registrations (174), Awards, Participants, Leaders, Award Centres, Adventurous Journey, Sub-Operating Partners, Operating Partners, Guides and Policies, Reports, My Office, and Support (highlighted). The main content area is divided into two sections. The top section is titled 'Account Merging (moving Awards)' and contains two input fields: 'Source Account ID (the one from which the award will be taken, without PN prefix)' and 'Target Account ID (the one which will be used after the merging, without PN prefix)'. Below these fields is a blue button labeled 'Merge Accounts'. The bottom section is titled 'Delete an Award Level' and contains a dropdown menu labeled 'Award Level to delete' with 'Select' as the current selection, and an input field labeled 'Participant ID'. Below these fields is a blue button labeled 'Delete Award Level'.

Account merging: This enables you to remove duplications where both participant accounts need to be kept. Considerations with merging:

1. Two Participant ID numbers are required, from a *source* account and a *target account*. The target account is the profile that will be kept, with the Award level from the source account being moved. Information from the participant's main *Detail* tab will be deleted along with the source account profile, with the target account remaining.
2. The source account must have only one Award Level and it must not be the same level as the Award Level in the target account. You cannot merge two of the same Award Levels together.
3. The source Award Level must be the lower-level Award (i.e. you cannot merge a Silver to Bronze, it must be Bronze to Silver).
4. Both participant profiles (from the source account and target account) must be Current/Active before they can be merged.
5. Whilst birth dates are checked when merging (they must be the same), names are not, and so accounts should be checked carefully when merging.
6. Major activities should be checked after the merger, as they may be affected or may need to be altered.

Deleting an Award Level: This may be needed where a participant has registered a new ORB account and a merge is not appropriate. It may also be needed where an incomplete previous level is preventing progress at the current level. Considerations with merging:

1. **Deleting an Award Level is completely irreversible. The developers will not be able to retrieve the data that is lost.**
2. The participant will need to have more than one Award Level (as a participant must have at least one Award Level registration in order to have an ORB account).
3. The major activity will reset if it is part of the deleted Award Level
4. If two Awards remain after the deletion, then the major activity will be set to the lower Award Level (so long as it's not in either Award Authorisation state or beyond).

Note that with both tools, a pop-up dialogue will ask you to check and confirm the action.

7. Custom field available within Award Centre detail

(6194)

Context: A request from an Operating Partner to include the ability for the Operator to add their own organisation's reference code for each Award Centre.

Solution: A free-text *Operator Reference* field added, which can be edited only by the Operator (in *Office Details* of each Award Centre).

Next Steps:

1. This field is being added to the *Award Centre Details* report
2. Consideration if this should/could be customised to be a field which Award Centres can see, or one which is hidden from them (so that it is for an Operator's internal use only)

The screenshot shows the 'ORB Training Award Centre (AU000028538) - Details' page. The 'Operator Reference' field is highlighted with a red box. The page includes a sidebar with navigation options, a top navigation bar, and several sections: 'Office Details', 'Overview', and 'Licence Holder/Authorising Contact'.

Office Details:

- Name: ORB Training Award Centre
- Operator Reference: (highlighted field)
- Type: Other
- Phone Number: +44
- Fax: +44
- Website:
- Facebook:
- Note: This is an Award Centre set up for training purposes.

Overview:

- ID: 29538
- Organisation mode: Online
- State: Active
- International Region: Europe, Mediterranean, Arab States (EMAS)
- National Award Authority: Testing Country - NAO
- Operating Partner: 03 - Scotland
- Sub-Operating Partner: 01 Highlands
- Created at: 08/02/2022
- Active Participants: 18
- Total Participants: 18
- Active Leaders: 1

Licence Holder/Authorising Contact:

- First Name: Training
- Middle Name: ---
- Last Name: Contact
- Email: orb.support+23@intaward.org
- Phone: +447894561230

In a previous ORB release, we added a *Direct Money Transfer* as a payment type, that NAOs can choose to include in their payment options for participants. *Direct Money Transfer* is meant to relate to where a participant's registration fees are paid via a direct bank transfer to the NAOs account.

Although the payment type was created, a related payment status (the form of payment assigned during participant registration) was not. This has now been rectified and is shown as: *Paid by Bank Transfer*

Next steps:

- Customisable text for the bank transfer payment option when registering, so that an NAO can specify details.

Guidance on translations

Changes to the ORB will mean new translations will need to be made. Translations related to the above and any others that have been added or amended recently can be found more easily by looking for the comments where a note on the update is added. This can be done by sorting entries by 'last commented' and checking for comment, for example: *2.9.0 update - January 2022* (see screenshots below). **Although this can be done at any time, we will refresh languages on the ORB just before the update is published live. There may also be changes based on feedback, so please do revisit the translations in the week(s) before the update goes live**