

## ORB Update 2.10 – release notes for NAOs

The following guidance outlines forthcoming updates to the ORB, through release 2.10.0. **These updates are scheduled for release on Tuesday 19<sup>th</sup> April, at around 08:00, UTC. Note that the ORB will be unavailable for up to two hours during this time.**

**Customisations:** You have a range of options available to you to help make the ORB adaptable to your local needs. Customisations range from the ability to refine age limits for participants and Award Leaders, creating your own registration profile questions, through to amending the text of automated email. The Customisations tab is found in the 'My Office' area of your ORB profile. **Please review these, including the new customisations introduced with this release, to ensure the ORB is best set up to suit your needs. If you decide to adopt these changes, you will need to communicate when and how the changes will be applied to your stakeholders.**

Translations should be updated by your relevant team member on POEditor prior to the release date. [Guidance on translations is here.](#)

Please feel free to edit/share this guidance with your Award Centres as you see fit. A summary of this guidance, highlighting only the changes applicable at Award Centre level, [is available on the open ORB group on the Award Community](#) (which can be accessed by Award volunteers who are registered on the Award Community).

If you have any questions about this release, please do let me know.

Best wishes,

Peter Orrey  
Digital Programmes Manager  
[peter.orrey@intaward.org](mailto:peter.orrey@intaward.org)

	Type of change
1. <a href="#">Assigned roles (NAO/Operating Partner roles, Award Verifiers) will be prompted to undertake a full registration process</a>	Applies to all
2. <a href="#">When setting up an Award Centre, the Authorising Contact/Licence Holder field can also be the Award Coordinator</a>	Customisation
3. <a href="#">Further emails added to customisations</a>	Customisation
4. <a href="#">Auto-archiving of participants</a>	Customisation
5. <a href="#">A change in how Award sign off attempts are counted</a>	Applies to all
6. <a href="#">Improvements to Adventurous Journey Preparation and Training</a>	Applies to all
7. <a href="#">Further bulk action: Changing parental consent from paper to electronic</a>	Applies to all
8. <a href="#">Automatically shrink the ORB left-hand menu for users with smaller screens</a>	Applies to all
9. <a href="#">Enable documents to be added that are not related to an activity section</a>	Applies to all
10. <a href="#">During activity approvals, lists of logs appear in a pop-up window</a>	Applies to all
<a href="#">Bugs, general fixes and notable background improvements</a>	
<a href="#">Guidance on translations</a>	

## 1. Assigned roles (NAO/Operating Partner roles, Award Verifiers) will be prompted to undertake a full registration process (5834)

**Context:** Non-Award Leader roles on the ORB (NAO, Operating Partner, Award Verifier) can currently be added to the ORB (by someone with appropriate permissions) without them needed to complete a full registration. The person adding the role completes most of the data and the new role receives an email prompting them to set a password and sign in. Following this process, the new roles would not see or check any ORB Terms and Conditions, Privacy Policy or other documentation that is required.

**Solution:** When a role is created directly from the ORB (from an organisation contact), a link is sent to the contact's email address, prompting them to complete the registration process, including agreeing the relevant privacy agreement and Terms & Conditions. This works much in the same way a participant's next level invitation. If a *Recover Password* request is made before registration is complete, the link in the resulting email prompts the user to complete registration first.

ID	First Name	Last Name	Email	System Rights	Status
				NAO Staff	Current
					Current
					Current
				NAO Staff	Current
					Current
				NAO Staff	Archived

**Add role**

Organizations: Select

Role: Select

Email: [input field]

Secondary Email: [input field]

## 2. When setting up an Award Centre, the Authorising Contact/Licence Holder field can also be the Award Coordinator

**Context:** When Award Centres are being set up, the details of the Authorising Contact/Licence Holder is required. The relevance and use of this contact varies between Operator. For some, this contact cannot be the same as the Award Coordinator but for others it is often the same person. The ORB does not currently allow for situations where the contact is the same, causing complications with the potential to slow the process of an Award Centre being set up on the ORB.

**Solution:** Removal of the validation that does not allow the Authorising Contact/Licence Holder to have the same email address as the Award Coordinator. A consequence of this is that those Operators who do require the contacts to be different people will need to check when approving the Award Centre registration.

*This is a customisation at NAO level (so that where an Authorising Contact still needs to be the different to the Award Coordinator, it can be).*

The screenshot shows the 'Customisation' interface for Peter Orrey (ID: 98496). The 'Authorisation and Access control' tab is active, displaying several settings with checkboxes and edit icons:

Setting	Value
Allow Award Leaders to see and manage all participants within their Award Centre.	true
Allow authorization contact same as main award coordinator	true
Allow sending of the emails about the return of an Award to the award Leader for revision.	false
Allow Award Leader to delete participants after they have paid	false
Allow Award Leaders to Approve Award Registrations.	false
Assessor details (name, email or phone number) mandatory at activity setup	false

There is a checkbox to state if the Authorising Contact and Award Coordinator are the same person, so that details do not have to be completed twice.

The screenshot shows the 'Authorising Contact / Licence Holder' form. The form includes the following fields:

- Title: Select
- First Name: [Text Field]
- Middle Name: [Text Field]
- Last Name: [Text Field]
- Role in Organisation: [Text Field]
- Email: [Text Field]
- Confirm email: [Text Field]
- Phone number: [Text Field] (Country code: +44)
- Phone type: Select
- Checkbox: same as Main Award Coordinator
- Continue button

### 3. Further emails added to customisations

*Context:* 2.9.0 release saw six of the automated emails coming from the ORB available to edit direct in customisations. We will continue to add emails over the coming releases.

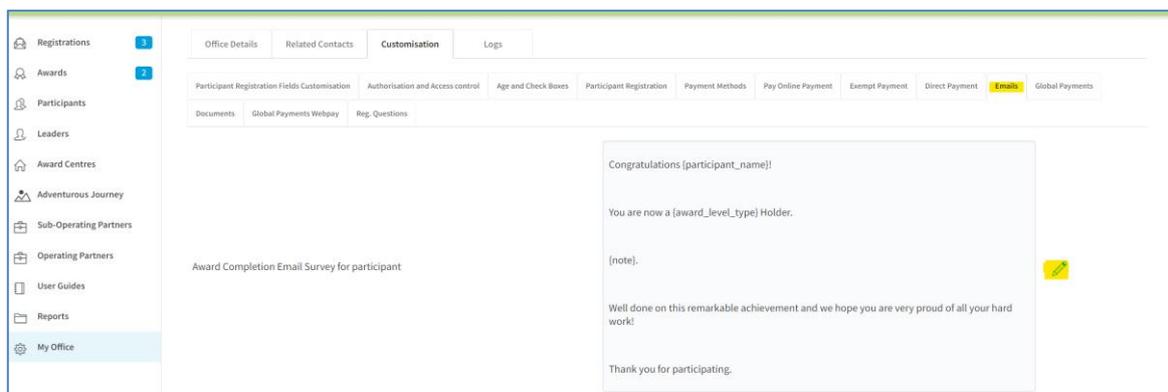
*Solution:* A continued overhaul of the email customisations to enable easy editing. Over several releases, emails will be added to the customisation so that all email will be easily customised by the NAO from the ORB. The tool will include easier formatting (for example, of font sizes and images and links), including the ability to change the email subject.

**This customisation also enables the adding of different language versions of email and so, if you're a multilingual Operator, you can ensure that all your stakeholders receive the correct language version of an email.**

**Please contact me ([peter.orrey@intaward.org](mailto:peter.orrey@intaward.org)) if you would like a demonstration of how these emails can now be customised.**

With 2.10 the following emails have been added:

- PARTICIPANT - Next level invitation email (to the participant)
- AWARD LEADER - Confirmation that a participant's Award has been signed off.
- ASSESSOR - Requesting an activity section assessment
- ASSESSOR - Requesting an AJ assessment
- ASSESSOR - Requesting a Gold Residential Project assessment
- PARENT - The parental consent email



**Award Completion Email Survey for participant**

Language: English (United Kingdom)  Propagate to all languages

Subject: Subject - award completion email survey for participant

Text:
 

- Conratulations {participant\_name}!
- You are now a {award\_level\_type} Holder.
- {note}.
- Well done on this remarkable achievement and we hope you are very proud of all your hard work!

Custom parameters:
 

- {participant\_name} - Participant full name.
- {award\_level\_type} - Award Level.
- {note} - Note used during approval process.
- {link} - Custom link, if is set.
- {1} - Next level invitation link.

Buttons: Close, Show Original, Hide Help, Update

Callout boxes:

- Select different language options to create your own translated version of an email.
- If not translating, applying the change to all languages will ensure a consistent message.
- Subject field of emails can be edited here
- Various formatting options are available.
- The body the email is edited here.
- Any 'variables' available are listed here (for example, adding {participant\_name} anywhere in the email will mean the participant's name is automatically added).
- Update to save the message (sometimes you will need to go back to the email to update to ensure changes are saved).

#### 4. Auto-archiving of participants

**NOTE THAT THIS UPDATE IS NOT YET AVAILABLE AND WILL BE RELEASED IN A MINI-UPDATE AS SOON AS POSSIBLE (WE WILL NOTIFY YOU WHEN THIS HAPPENS)**

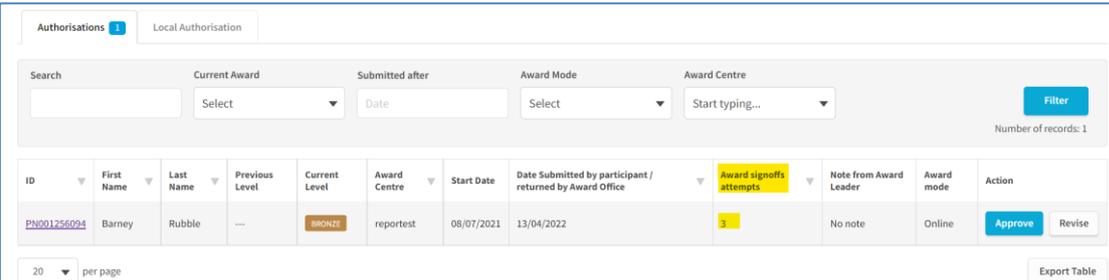
*Context:* Participant lists can become unwieldy with participants who are not active on the ORB, whether with completed Awards. in progress or in set up, but where, for some reason, the are not currently continuing with their Award.

*Solution:* A customisation for NAOs to set an auto-archivation of participants, to include the ability to define the number of days from when a participant has recorded anything on their ORB.

## 5. A change in how Award sign off attempts are counted

The way the ORB currently counts the number of attempts (for Award signoff) appears to be flawed. The attempt is counted after an Award is both revised by the Award Office (pushing it back to the Award Leader) and by the Award Leader (pushing it back to the participant). An attempt should only be counted when it is pushed back by the Award Office and not counted when there is any back and forth of the Award approval between the Award Leader and the participant. The count of attempts is potentially an indicator of quality control of Awards being submitted and is only useful to show the number of attempts that an Award Leader has submitted to the Award Office (or verifier).

**Solution:** A change the count of attempts to show only when the Award Office has pushed back an Award for further revision. This is also reflected in reports (for example, the Award Completion report).

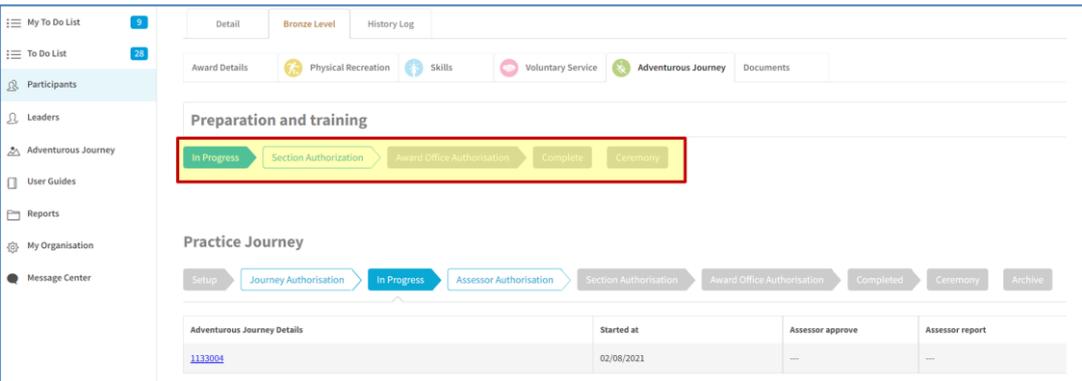


ID	First Name	Last Name	Previous Level	Current Level	Award Centre	Start Date	Date Submitted by participant / returned by Award Office	Award signoffs attempts	Note from Award Leader	Award mode	Action
PN001256094	Barney	Rubble	---	BRONZE	reportest	08/07/2021	13/04/2022	1	No note	Online	Approve Revise

## 6. Improvements to Adventurous Journey Preparation and Training

**Context:** Unlike other sections of the Award, the Adventurous Journey preparation and training does not have a status bar to indicate progress or enable intervention by the Award Leader. This makes checking, navigation and support from Award Leaders more challenging and this part of the AJ can also become 'stuck.'

**Solution:** The status bar is added to Preparation and Training, mirroring the process for all other parts of the Award on the ORB. This enables appropriate intervention by Award Leaders.



Adventurous Journey Details	Started at	Assessor approve	Assessor report
1133004	02/08/2021	---	---

## 7. Further bulk action: Changing parental consent from paper to electronic

Continuing from the previous updates, this new bulk action would enable incomplete parental consents to be changed from paper to email to enable email requests to be sent out.

This is only available:

- Where consent has yet not been confirmed
- Where electronic consent/consent by email has not already been selected
- Where a parent/guardian email has been added (where an email is missing, the participant cannot be selected for this bulk operation).

The screenshot shows the ORB system interface with a bulk action dropdown menu open. The menu options are: 'Select consent', 'Collect email addresses for emailing', 'Resend confirmation email', and 'Parental consent from paper to electronic'. The 'Parental consent from paper to electronic' option is selected. The background shows a table of participants with columns for Name, Last Name, Registration Date, Level, Email Confirmation, Parent Authorisation, Payment, Review, and Action. The table contains three rows of data.

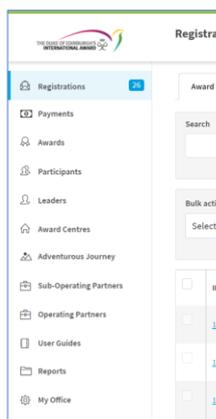
Name	Last Name	Registration Date	Level	Email Confirmation	Parent Authorisation	Payment	Review	Action
Test	Test	20/10/2021	BRONZE	⚠️	Electronically ⚠️	Paid ✓	Confirm	Approve
PH001234755	bronzee	08/07/2021	BRONZE	⚠️	Electronically ⚠️	Exempt ✓	Confirm	Approve <small>Warning: Name and DOB same as: PH001052018</small>
PH000201292	Tessa	20/08/2020	SILVER	✓	Electronically ✓	Paid ✓	Confirm	Approve

## 8. Automatically shrink the ORB left-hand menu for users with smaller screens

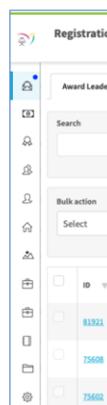
**Context:** Around 15% of adults accessing the ORB via a laptop/PC are viewing through a screen that requires the user to scroll left or right to see all available information.

**Solution:** The ORB left-hand menu will automatically for users with smaller screens, including minimising the left-hand menu (to just icons, with a blue dot to signify actions). The section title will appear when the cursor is hovering over an icon.

Before:



After:



## 9. Enable documents to be added that are not related to an activity section

**Context:** Documents being added to an Award (by the Award Leader) currently need to be categorised against one of the sections. However, there are occasions where documents need to be added that are not specific to a section (for example, a scan of an offline Parental Consent form).

**Solution:** Add a *Parental Consent* and *Other* upload options to the list of categories when an Award Leader uploads a document. *Note that this change is currently for Award Leaders (to add documents), rather than participants.*

The screenshot shows a web application interface for adding documents to an award. The interface includes a search bar, a user profile 'Atest tester TEST Award Centre 2021 (AP)', and a form with fields for Title, Description, and File category. The File category dropdown menu is open, showing options: Other, Activity, Adventurous Journey, Other, Parental Consent (highlighted), and Gold Residential Project. There are also 'Add Activity' and 'Upload File' buttons.

## 10. During activity approvals, lists of logs appear in a pop-up window

**Context:** When approving sections, Award Leaders need to view the logs of a participant. In doing this they navigate away from the section approval page and after checking logs, need to navigate through several links to get back to section approval. Where an Award Leader is needing to approve multiple sections from different participants, this can be time consuming.

**Solution:** Clicking on each activity title in Section Authorisation/Approval opens a pop-up window where the Award Leader can quickly view logs before approving, meaning they do not need to navigate away from (and back) to section authorisation. The ability to view the whole section is still available under 'View section.'

*The Section Authorisation / Approval includes a link to each activity*

ID	First Name	Last Name	Level	Finished	Logs	Assessor Authorisation	Note for Award Leader	Action
1316549	Fred	Flintstone	Bronze		<a href="#">Origami</a> <a href="#">Graphic Design</a> <a href="#">Violin</a> <a href="#">View section</a>	<a href="#">View</a> <a href="#">View</a>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<a href="#">View</a> <input type="button" value="Approve"/> <input type="button" value="Revise"/>

Logs	Assessor Authorisation
<a href="#">Origami</a>	<a href="#">View</a> ✓
<a href="#">Graphic Design</a>	<a href="#">View</a> ✓
<a href="#">Violin</a>	<a href="#">View</a> ✓
<input type="button" value="View section"/>	

*Clicking on the activity shows a summary:*

### Section Authorisation

#### Origami

**Activity Detail**

Activity Type: Crafts, Activity: Origami, Goal: A smart goal is written here.

**Assessor Details**

Title	Name	Email	Phone	State
Ms	Test Assessor	Test.Assessor@intaward.org	---	---

**Logs** 14 / 13 h

03/01/2022	1 hour 0 minutes	Created at: 13/04/2022 18:11
Example log 1		
10/01/2022	1 hour 0 minutes	Created at: 13/04/2022 18:11
Example log 2		
30/01/2022	2 hours 0 minutes	Created at: 13/04/2022 18:12
Example log 3		

## Bugs, general fixes and notable background improvements

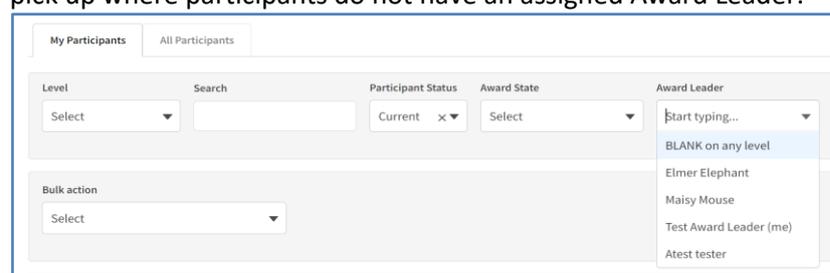
**Language lists to be made alphabetical:** The dropdown lists where users select which language they would like to use will be reformatted to ensure that it is alphabetical.

**Experience and qualifications fields made mandatory for Assessor reports and the phone number made optional:** It's currently optional for the Assessor to add this important context to their assessor's report and so at least one of the experience or qualification fields will be required. Currently the phone number is mandatory, this will now be optional for the assessor to decide if they would like to share it.

**Increase in file upload size:** The current limit of file sizes, on the ORB website, that can be uploaded is 10MB. This means that some files, particularly those with multiple images (for example, an AJ report), cannot be uploaded. This change will see the file size increase to 20MB and an error message to state that a file size is too large (with the limit stated).

**Payment Note added to integration API:** For those pulling information from the ORB to Salesforce, the integration API has been updated to include payment note information.

**Filter for 'no Award Leader':** Participant lists include a 'BLANK on any level' which enables you to pick up where participants do not have an assigned Award Leader.



## 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 before the update goes live**

