

# Online Record Book (ORB) Next Generation Transition Guide for Award Leaders

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The Duke of Edinburgh's International Award - Australia

February 2018



## Purpose of this guide

This guide has been prepared to support Award Leaders begin to use the Online Record Book Next Generation, how to access additional information and support and what to do when the most common issues arise.

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## What is ORB Next Generation?

In 2013 the Foundation introduced the Online Record Book (ORB). This was the first step on the journey to move from paper record books to a digital system allowing participants to manage their Award effectively and enabling staff and volunteers to quickly access information and monitor performance.

The ORB Next Generation (ORB Next Gen) is the next step in this digital journey. Over the past 4 years, the International Award Foundation (the parent organisation of The Duke of Edinburgh's International Award, based in London) has gathered suggestions for improvements, through many conversations, emails and an ORB Survey.

The new features of ORB Next Generation include:

- Faster access (eg when searching for records and running reports)
- Simpler and more intuitive interface
- Online Assessor approval
- Participant activity selection approval online
- Integrated Online Payment Gateway (at Award Unit discretion)
- There are free Apps available for both iOS and Android
- These Apps allow for anytime, anywhere access to Award progress
- Participants will notice little or no differences between the Web and App interfaces, making it simpler for them to switch between the two
- Award Leaders can use the App for all tasks except for approving participants, allowing easier access when away from a PC.

## Status of the transition from International ORB to ORB Next Generation

Between end November 2017 and early January 2018, all records in the International Online Record Book were transitioned over to the Online Record Book Next Generation.

To access ORB Next Gen, the URL is <https://www.OnlineRecordBook.org>.

## What support materials are available and how can I access them?

In addition to this guide, the following materials are currently available to support you with using the new ORB and are available on the dedicated ORB Next Gen page of the Australian website:

<http://www.dukeofed.com.au/online-record-book-next-generation/>

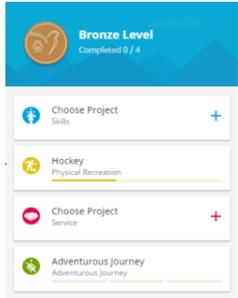
1. Award Leader and Participant User Guides
2. Award Leader and Participant Online Training Modules (videos)
3. Frequently Asked Questions

Additional resources will be developed and made available on the Australian website.

## ORB Next Gen – Key Differences

The table below outlines some of the key differences between the old system and ORB Next Gen.

Difference	Summary of changes	More information
Participant and Award Leaders Apps	It is not possible to register for the ORB Next Generation through the Apps, this must be done through the Web interface. Once registration is complete, then users will be able to access the Apps using the applicable log-in details.	Online Record Book App Module Participant App User Guide Award Leader App User Guide FAQs
Users set up their own passwords at registration	Instead of the system generating passwords for users, users create their own as part of the registration process. Users are able to log in before their registration has been approved but are not able to enter any information. If users log in prior to registration approval, they receive a message on the screen to advise why they cannot yet access.	
Participants show up in Award Leader Participant List as soon as there is a registration submitted.	In the International ORB, Participants only appeared in the Award Unit's Participant list once the registration had been approved by the Award Leader. They now show in the Participant List with a status of 'Registration Approval'	
Award Leaders can no longer change Participant passwords	It is standard practice for information systems to have passwords that are not accessible by other users, only by technical support team.	
Participants are linked to Award Leaders, in addition to Award Units	Participants can allocate themselves to an Award Leader via registration and Award Leaders have the ability to allocate Participants to an Award Leader.	Award Leader Web User Guide
Award Leaders have the option to view only linked participants or all Award Unit's participants	When logging in as an Award Leader, you will have the option to just see the participants who are assigned to you on the ORB.  All Award Leaders will also be able to see all participants registered at their Award Unit.	Award Leader Web User Guide

<p>In ORB Next Gen there is no overall percentage for participant progress however in the Participant's view they have a 'progress bar' for each activity to give a visual representation of how they are progressing.</p>		
<p>Algorithm measuring participant progress has been amended</p>	<p>The algorithm used within 'Next Generation' still uses Duration, Hours and Regularity in order to calculate Award progress, however there has been some relaxation around the controls for regularity. Participants whose progress was restricted by the regularity control in the International ORB (old system) should see a positive change in their progress in ORB Next Gen (new system). Please note that the requirements for completing the Award have not changed.</p> <p>In addition, in the new system, there will longer be an added 'automatic' 10% progress at Participant setup as this didn't give a true reflection of Participant progress. Any Participants that notice a small regression in their Award progress is a result of that 'inflated' percentage being removed.</p>	
<p>Award Leaders must approve each Participant activity and associated Assessor via ORB Next Gen before any logs activity can be entered by the Participant.</p>	<p>This has always been a requirement of the Award. Now it is enforced via the Online Record Book.</p> <p>This is also a requirement of any Awards that are being managed offline. The Award status can only be manually pushed forward once the Activity for each section has been added and approved by Award Leader.</p>	<p>Award Leader Web User Guide</p>
<p>Note from Award Leader once Award is approved</p>	<p>Award Leaders can use this section to provide any additional details that they think the Operating Authority will need to know when reviewing a participant's Award.</p>	<p>Award Leader Web User Guide</p>
<p>Assessor signoffs / reports can be done online.</p>	<p>A Participant no longer needs to download a report and give to assessor for them to sign off – this process can now take place online via email.</p>	<p>Participant User Guide – page 16</p>

## Getting started in ORB Next Gen as an Award Leader

### 1. System emails – critical action

The communication between users of ORB Next Gen, like the International ORB before it, is based on emails generated from the system. These emails, which detail actions required and completions achieved, depend on the emails being able to get through to each of the users.

ORB Next Generation has a different domain name and email server to the International ORB.

Organisations such as schools with strong security measures in place around email access and accessible domains will need to ensure that users can access this domain and email server. The new domain name ([www.OnlineRecordBook.org](http://www.OnlineRecordBook.org)) and email server ([o1.OnlineRecordBook.org](mailto:o1.OnlineRecordBook.org)) and the email addresses [NoReply@ORB.OnlineRecordBook.org](mailto:NoReply@ORB.OnlineRecordBook.org) and [ORB@OnlineRecordBook.org](mailto:ORB@OnlineRecordBook.org), need to be whitelisted by your organisation's IT department. This will ensure easy system access and allow emails from the system get through your organisation's firewall. You may also need to add them to your 'safe senders' list in your email account to ensure they don't end up in your junk mail.

Once transition was completed, ORB Next Gen sent out emails to all users requesting them to update their passwords (they won't have access to the system until they do this). See "Logging in for the first time" below.

### 2. Updating your browser/s

The Online Record Book (ORB) can be accessed using the latest versions of the following browsers: Google Chrome, Safari, Firefox, Microsoft Explorer, Edge. We recommend using Chrome where possible. If you haven't updated your browser for a while and are working in an older version, you may not get optimum performance from the system.

### 3. Logging in for the first time

ORB Next Gen has retained your username (the email address you originally registered with) but the password will need to be updated before you are able to access ORB Next Gen. You will not be able to log in to ORB Next Gen (web or app) until your password has been updated.

At the time of the transition (December/January), the system sent all users an email (from either [NoReply@ORB.OnlineRecordBook.org](mailto:NoReply@ORB.OnlineRecordBook.org) and [ORB@OnlineRecordBook.org](mailto:ORB@OnlineRecordBook.org)) that features a link that enables users to change their password.

If you have not received the email, please first check your Junk Mail and ensure that [ORB@OnlineRecordBook.org](mailto:ORB@OnlineRecordBook.org) has been added to the safe senders list for that email account. If using a school email address, please ensure that item 1 above has been completed.

If you cannot find the email and have actioned all of the above, visit <https://www.onlinerecordbook.org/> and select 'Forgot your password' on the login page to resend the password reset email.

If you have actioned all of the above and have not received the email, contact the ORB Helpdesk on [orb@dukeofed.com.au](mailto:orb@dukeofed.com.au) or 1300 4 DUKES (option 1).

Participant  Award Staff

Award Staff login

Email

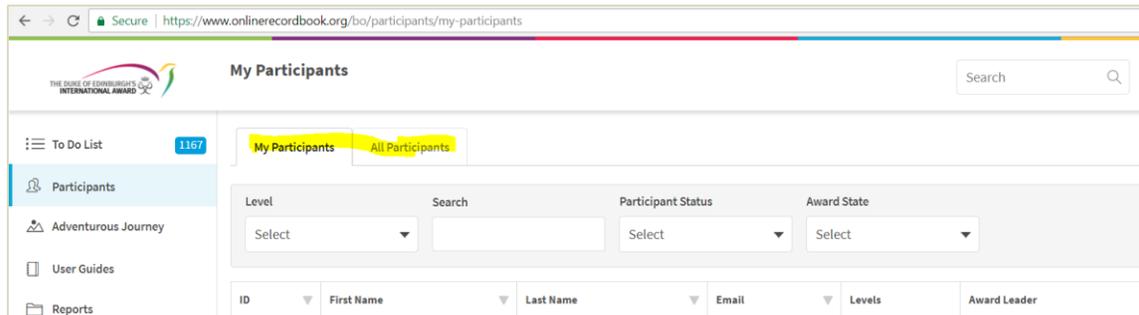
Password

[Forgot your password?](#)

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

#### 4. Allocating Participants to the correct Award Leader

In ORB Next Gen, participants are allocated to an Award Leader. This allows Award Leaders to see the actions only for the Participants who they are responsible for. In the Award Leader view, there are two tabs under Participants: My Participants and All Participants, so this does not stop the Award Leader from seeing all Participants in the Award Unit.



#### 5. Assisting Participants to log in and update Awards

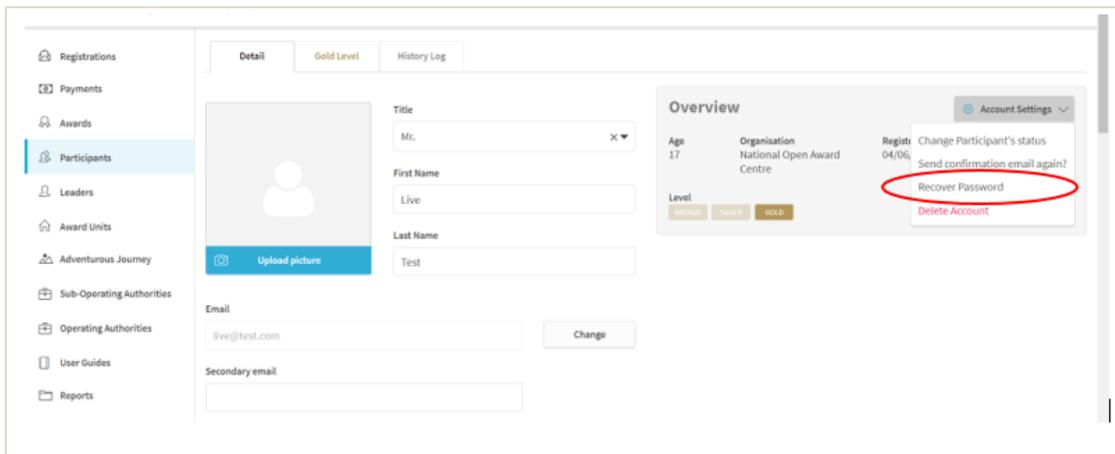
Participants also need to update their password via the system link generated through email to be able to gain access to ORB Next Gen (website or App).

If any Participant hasn't received their email, please ask them to ensure that they check their Junk Mail and they have added ORB@OnlineRecordBook.org to their safe senders list.

They can visit <https://www.onlinerecordbook.org/> (the Next Gen login page) and select 'Forgot your password' to resend the password reset email.

If they still cannot find the email, you are able to resend it through your account as follows:

- Once you've logged in, search for the Participant's name in your Award Leader menu.
- Once in Participant Detail tab, check that their email address is correct (if not, select the change button and edit)
- Select the Account Settings bar in the Overview box.
- Select 'Recover Password' from the drop down list. This will resend the email to the participant to change password.



If they still don't receive the email, or they do receive the email but the password cannot be changed, email [orb@dukeofed.com.au](mailto:orb@dukeofed.com.au) with the participant's details and it will be escalated for resolution.

**Note:** Award Leaders can no longer change participant's passwords directly.

## 6. Accessing the Apps

The Award Leader App allows users most of the functionality of the Web interface except for approving Participant registrations, which must be done through the Web.

The Award Leader and Participant apps are available for Android (Google Play) and iPhone (App Store). Both link through from the login screen of the ORB Next Gen at [www.onlinerecordbook.org](http://www.onlinerecordbook.org).

The Apps can also be accessed directly via the following direct links:

- **Android Participant:**  
<https://play.google.com/store/apps/details?id=org.dofe.dofeparticipant>
- **Android Award Leader:**  
<https://play.google.com/store/apps/details?id=org.dofe.dofeleader>
- **iOS Participant:** <https://itunes.apple.com/gb/app/id1215719234>
- **iOS Award Leader:** <https://itunes.apple.com/gb/app/id1215719412>

**Note:** Currently, Participants aren't able to register to the Award via the App, only via the website. The app can be accessed once the registration has been completed and submitted.

## 7. Signing off on current completed Awards

### Online Awards

Awards that have been transitioned to Next Gen should be at the same status/progress as they to what they were in the previous system and they should be able to continue as if there had been no change. If there are any concerns about a Participant's Award status, contact the ORB Helpdesk.

### Offline Awards

If the Participant or Award Unit had extenuating circumstances and were allowed by the Award Operating Authority to complete the Award offline, there have been some changes to the system that will impact the signing off of an Award. In the previous ORB, users could create an account and capture their progress on paper and Award Leaders would be able to push them through the requirements to sign them off. In Next Gen, Participants are required to enter the information for each Activity as well as the Assessor name to be able to progress through the Award. Awards that had been created prior to the transition now need to be backfilled with this information before the Award Leader is able to manually process them to Award Office signoff.

- Search for Participant and select their record from the search results list

- b) Select the current Award Level and then select each activity tab.
  - a. Within each Award Section Tab, Enter Activity details (Activity Type, Activity, Goal)
  - b. Enter the Assessor details

The screenshot displays the 'Bronze Level' award configuration page. At the top, there are tabs for 'Detail', 'Bronze Level', and 'History Log'. Below this is a navigation bar with tabs for 'Award Details', 'Physical Recreation', 'Skills', 'Service', 'Adventurous Journey', and 'Documents'. A progress bar below the navigation bar shows stages: Setup (active), Approval, In Progress, Assessor Approval, Award Leader Sign-off, Award Office Sign-off, Ceremony, Completed, and Inactive. The main content area is divided into two sections: 'Assessor Details' and 'Activity Detail'. The 'Assessor Details' section has a table with columns for Title, Name, Email, Phone, and State, and a 'Change' button. The 'Activity Detail' section has dropdown menus for 'Activity Type' and 'Activity', a text area for 'Goal', and a 'Major' checkbox. A 'Logs' section on the right shows 'No logs'.

- c) Once all Sections are set up and Assessor detail is captured, open the Award Details tab and move the status of the Award to Award Leader Sign-off.

This screenshot shows the 'Award Details' tab selected in the navigation bar. The progress bar at the bottom of the page is highlighted, showing the current status of the award. The status is 'Award Leader Sign-off', which is highlighted in green. Other statuses in the bar include 'Registration Assessment', 'Registration Approval', 'Setup', 'In Progress', 'Award Office Sign-off', and 'Ceremony'.

## 8. Registering new Participants

Participant registration occurs similarly to the previous iteration of the ORB. Here are instructions for applicants:

- a) Go to [www.onlinerecordbook.org](http://www.onlinerecordbook.org)

- b) On the right hand side of the page, select 'Award Participant'.
- c) Press 'Register' to continue the registration process.
- d) On the resulting page, select 'Australia' for country.
- e) Select Operating Authority from the drop down list. The Operating Authority is the organisation that the Award Unit is licensed to.

- f) Select the Award Unit (this is a drop down list which is dependent on which Operating Authority has been selected).
- g) If the Award Leader is known, select Yes and enter the relevant name and email address. If not, select No and the appropriate Award Leader will be allocated by the Award Unit during the approval process once the

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registration has been submitted. Press blue 'Continue' button at bottom of page.

h) On next page, Select Award Level – Bronze, Silver or Gold, then press the blue 'Continue' button.

The screenshot shows a web browser window with the URL <https://www.onlinerecordbook.org/fo/register/participant/level>. The page features a blue sidebar on the left with a navigation menu containing six items: 'Welcome' (checked), 'Award Level' (selected), 'Contacts', 'Participant Details', 'Profile', and 'ORB Account'. The main content area is titled 'Award Level' and contains the text 'What level of the Award are you registering for?'. Below this, there are three radio button options: 'Bronze Level' (selected), 'Silver Level', and 'Gold Level'. A blue 'Continue' button is positioned at the bottom center of the form.

i) Complete contact details. Highlighted fields below are mandatory; the others are optional. The phone number must be entered with full Australian prefix (+61). Format phone number without spaces and dropping the leading zero (eg) 0405789876 becomes +61405789876. Once complete, select the blue 'Continue' button.

The screenshot shows a web browser window with the URL <https://www.onlinerecordbook.org/fo/register/participant/contacts>. The page features a blue sidebar on the left with a navigation menu containing seven items: 'Welcome' (checked), 'Award Level' (checked), 'Contacts' (selected), 'Participant Details', 'Profile', 'Payment', and 'ORB Account'. The main content area is titled 'Contact Details' and contains several input fields. The 'Email' and 'Phone number' fields are highlighted in yellow, indicating they are mandatory. The 'Confirm email' and 'Phone type' fields are also highlighted in yellow. The 'Secondary email' and 'Secondary phone number' fields are optional. A blue 'Continue' button is positioned at the bottom center of the form.

j) Enter Personal Details – name, gender, address, birthday. Once complete, press blue 'Continue' button.

**Personal Details**

Title  
Select

First Name Middle Name Last Name

Date of Birth  
Date

Gender  
 Female  
 Male  
 Prefer not to say

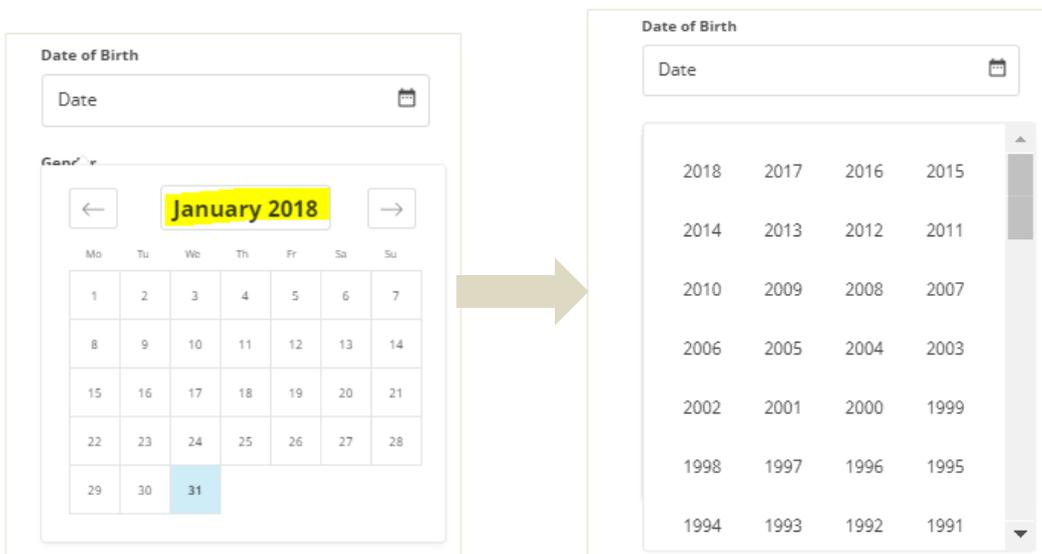
Nationality  
Select

Employment Status  
Select

Home Address  
 Address First Line  
 Address Second Line(Optional)  
 City Zip / Post Code  
 State/Province/Region Country  
 Select

Continue

**Note:** for birthdate, to easily select the birth year, click on the month/year button at top of calendar and the view will change to list years. Click on the correct birth year then it is much easier to simply select the month and date.



- k) If applicant is under 18 at the time of registration, the system will ask for details of a parent/guardian who is able to provide consent for the applicant. Applicants must also select how that consent will be provided – online via the system or via a paper form to the Award Leader. If you’re older than 18 years old, you won’t be asked to provide parental/guardian consent. Once details have been completed, select the blue ‘Continue’ button.

The screenshot shows the 'Parent / Guardian Consent' form. On the left is a navigation menu with 'Parent Consent' selected. The main content area has the title 'Parent / Guardian Consent' and a note: 'Because you are under the age of 18, we need consent from your Parent/Guardian.' The form contains the following fields: 'Your parent/guardian First Name', 'Your parent/guardian Last Name', 'Relationship', 'Phone' (with a country code dropdown), 'Email', and 'Confirm email'. Below these fields are three radio button options: 'My parent/guardian consent has already been given to my Award Leader.', 'My parent/guardian will confirm consent by email', and 'My parent/guardian will complete and sign the parent/guardian Consent form'. A blue 'Continue' button is at the bottom.

- l) Answer the Profile Questions. Most questions have a ‘prefer not to say’ option.

The screenshot shows the 'Profile Questions' form. The navigation menu on the left has 'Profile' selected. The main content area has the title 'Profile Questions' and several questions: 'Do you identify as being Aboriginal or Torres Strait Islander' (dropdown), 'Main language spoken at home' (text box), 'Are you affected by a disability' (dropdown), 'Year level at school' (text box), 'Are you currently participating in a Youth Justice Program' (dropdown), 'Are you currently attending (Uni/TAFE)' (dropdown), 'Are you currently participating in an alternative education program' (dropdown), 'Ethnicity' (text box), and 'How did you first hear about The Duke of Edinburgh's International Award' (dropdown). A blue 'Continue' button is at the bottom.

- m) Select your payment type – the options available are determined by the Award Unit – online payment and direct payment to the Award Unit/Leader are both options.
- n) On the last page of the registration form, users are able to set their own password for the system. Applicants are also required to agree to the Terms and Conditions of using the ORB and consent (or not) to any photographs taken during the Award to be used by the Award organisation for the purposes of promotion. The latter can be over-ridden by the Parent/Guardian through the consent form for those who are under 18.

- o) Once all details have been inserted click on the blue ‘Submit button to send your registration for approval. Applicants are able to initially log in but cannot enter any information until their registration has been approved. Approval is conducted by the Award Leader and is not immediate. The Award Leader may have specific actions that are required before registration is accepted (eg completion of an Award Plan, Assessor Child Protection info etc...).
- p) A verification email will be sent to the email address the applicant provided during the registration. This email will have a link for the applicant to verify their email address. The email address needs to be confirmed in order for the application to progress and be finalised.

**Note:** If applicant has not received the email confirmation within 2 hours of submitting the application, they need to advise the Award Leader. Award Leader to check if correct email address has been used in application – if not can update via Award Leader web browser and resend email:

- Search for Participant’s name
- Bring up their records (click on their record in the search results)
- Go to the ‘details’ tab view
- Check email address. If incorrect, select the ‘Change’ button to edit it
- Once edited, select the Account Settings button within the grey ‘Overview’ box on top right hand side.
- Choose ‘resend confirmation email again’ from the drop down list

- q) Once the registration has been approved by the appropriate Award Leader, the applicant will receive an email to advise that they have been accepted as a Participant and they can then log in to the system and begin to add Award information and activity logs.

**Note:** Participants will not be able to add any activity logs dated prior to the start date of the Award. This defaults to the date that the Award Leader accepted the registration but it can be manually adjusted by the Award Leader if required.

**Note:** If Participants log on to the ORB and registration is still awaiting approval, an error message will be displayed at the bottom of the screen in case, for example, Participants wish to start logging your activities.

*(a) Error message displayed*



Activity cannot be created until your registration is approved

Notification will be sent to the Participant when the registration has been reviewed and approved by the Award Leader

## Next steps for the transition

- **January 2018:**

- Release of version 1.6 of the system which will see a number of user issues addressed and improvements made.

Function	Development / Change	Status / Priority
Web	Ability for Participants to upload an Assessor Report at any time.	High
Web	Display the Title field for Adventurous Journeys so that Award Leaders can identify which one is which.	High
Web	Improvements to the auto-logout for when a user is logged in but has not performed an action for a number of minutes.	High
Web	Full integration with PayPal payment system (similar to MasterCard Payment Gateway).	High
Web	Access for NAOs and OAs to the Participant Registration tab (currently only available to Foundation staff).	Medium
Web	Ability for NAO staff to view all Adventurous Journey events under their purview.	Medium
Web	Email to be sent to Award Coordinators when Award Office signs-off an Award as Complete.	Medium
Web	Ability to recover and reassign to the correct Operator a Participant whose registration has been deleted due to an incorrect Operator selection during their initial registration.	Medium
Web	Ability for NAOs to move Award Units between their Operating/Sub-Operating Authorities.	Medium
Web	Notification to the Global Business Team when an IAC changes the details of their Award Coordinator.	Medium
App	Award Leader App to display Assessor email field under the relevant Section.	Medium
Web	Merging of the two existing Award Leader views into a single one.	Testing
Web	Ability to apply formatting to New Zealand Privacy Policy.	Testing

- **February 2018**

- Functionality to be added for Award Leaders to be able to view a Participant's records in the way the Participant sees it.
- Review of all reports to ensure validity of information
- Update of user documentation to reflect changes in version 1.6 plus creating user guide for reports.

- **March 2018**

- Training system development, due for release to users by end March.

- **June/July 2018**

- Introduction of more complete Assessor module, allowing Assessors to register to the system. Further information about this module to be shared closer to its introduction.

## **How do I get additional support with ORB Next Generation?**

If you have any questions or queries about the ORB or ORB Next Generation you should speak to or email the Online Record Book Helpdesk. They will be able to provide initial support and in the event of an issue that requires technical assistance they will escalate the query to the Foundation's dedicated IT Service Desk.

The ORB Helpdesk is open Monday to Friday, 8am-6pm.

Please expect a slight delay in response time at the beginning of the new school year with a very high volume of users accessing a new system for the first time.

### **ONLINE RECORD BOOK HELPDESK**

Tel: 1300 438 537 (prompt 1)

Email: [orb@dukeofed.com.au](mailto:orb@dukeofed.com.au)

Email: [orb@dukeofed.com.au](mailto:orb@dukeofed.com.au)