EVOLVE

Introduction to EVOLVE

for Head Teachers

Welcome to EVOLVE!

This document has been designed as an introduction for Head Teachers to EVOLVE.

EVOLVE is an online tool for planning and managing educational visits, on-site activities, after school clubs and sports fixtures. It is currently used by over 24,000 schools across the UK, and almost a million staff have used the system to efficiently plan and approve 3.5 million visits and activities – and counting!

Developed by experienced teachers and educational practitioners, this market leading system has been designed with teachers in mind. It helps schools, colleges, trusts and Local Authorities to improve and simplify the process of planning, approving, monitoring, evaluating and reporting all learning which takes place outside of the classroom.

Further information and "How To's" can be accessed at any time by clicking the red question mark icon at the top right of the screen in EVOLVE. Two further guides, 'Introduction to EVOLVE for EVCs' and an 'Introduction to EVOLVE for Staff members' are also available.

This document will explain:

Section 1: Setting up

- ☐ 1.1 How to get to EVOLVE
- ☐ 1.2 How to set up your account
- ☐ 1.3 Introduction to Dashboard

Section 2: Using EVOLVE:

- ☐ 2.1 The workflow of EVOLVE
- ☐ 2.2 How to add a visit *(Combined EVC and Head Teacher accounts only)*
- ☐ 2.3 How track the progress of visits
- ☐ 2.4: How to authorise and approve visits
- ☐ 2.5: How to return a visit or gather more information
- ☐ 2.6: How to report on visits
- ☐ 2.7: Where can I access further information?

Section 1: Setting up EVOLVE

Section 1.1: How to get to EVOLVE

EVOLVE is a cloud based service and therefore all you need in order to be able to configure and use EVOLVE is an internet enabled device such as a PC, MAC, tablet or mobile phone. You can access EVOLVE via your dedicated web address or you can go to the following address and choose your site from the list:
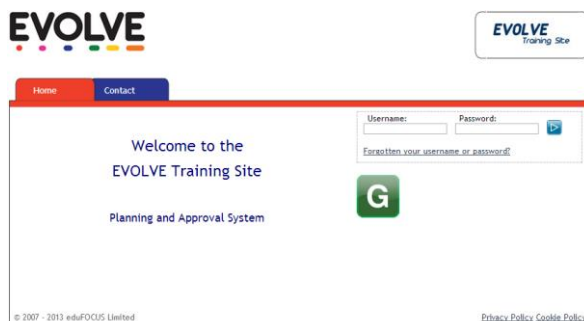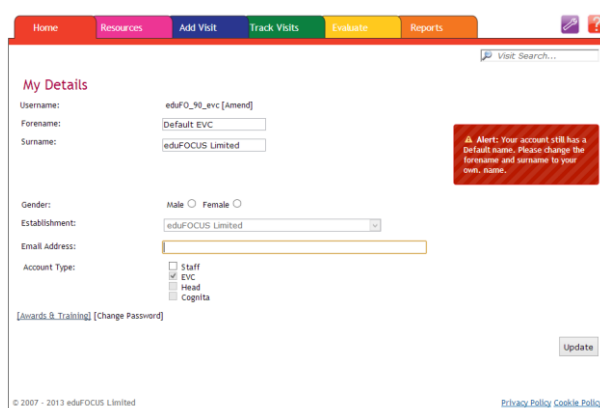
evolve.edufocus.co.uk

Section 1.2: How to set-up your Account

You should have received your default username and password from your site administrator. If you have not received these details then please contact your site administrator. If you are fulfilling the role of both 'EVC' and 'Head' at your establishment then you should log on using the 'Head' account details that you have been provided with.

1) Enter your username and password into the boxes on the home screen:

2) If this is the first time that you have logged in, you will be automatically redirected to your 'Profile' page and prompted to personalise your user account with your own **Forename**, **Surname**, **Gender** and **Email Address** (it is vital that you enter your email address otherwise you will not receive EVOLVE email notifications).

* If you are fulfilling the roles of both 'EVC' and 'Head' at your establishment then you should also tick the "EVC" checkbox to allow the single account to access both roles. Please notify your site administrator that the EVC-only account needs disabling.

3) Click **[Update]** to save the changes.

When your account was created it was given a default username and password. You must now secure your account by setting your own username and password. Try to choose a username that you will easily remember e.g. one that you use for other school systems or your email address etc. Passwords must be at least 8 characters long and they must contain both letters and numbers.

4) Click on the **[Amend]** link next to your username, enter your desired username and then click **[Continue]** to save it.

5) Click on the **[Change Password]** link at the bottom of the screen, enter your chosen password and then click **[Continue]** to save the new password.

6) Click **[Log Out]** at the top right of the screen and then use your new username and password to log back into the system to verify that your new details have been saved.

Section 1.3: Introduction to the Dashboard

As Head Teacher at your establishment you have access to the 'Establishment Dashboard'. The Dashboard is the place to go if you want to make any changes to your establishment's account on EVOLVE e.g. update your establishment's contact details, create and manage staff accounts, manage student registers, upload establishment documents etc. The 'Introduction to EVOLVE for EVCs' guide contains instructions on how to create and manage staff accounts, and upload pupils. The Dashboard is only accessible to 'EVC' and 'Head' user accounts at your establishment.

1) Log on to EVOLVE

2) Click on the orange cogs button on the home page.
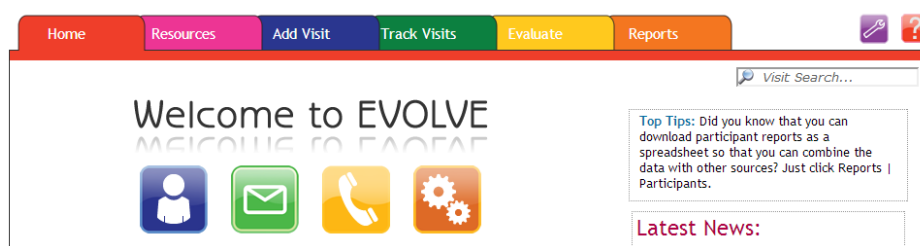
The Dashboard has 6 sections:
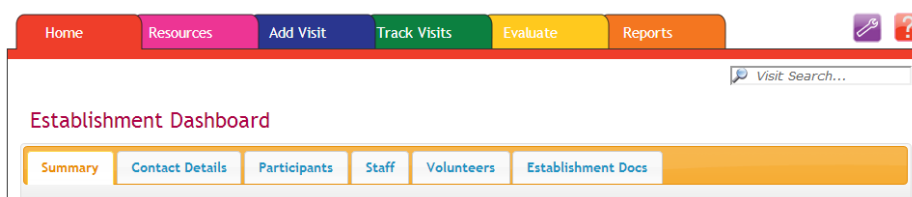
Summary	This provides a summary of the approval rules that apply for different types of visits, and lists the EVCs and Heads that are registered at the establishment.
Contact Details	You can update your establishment's contact details
Participants	This section allows you to manage the students listed for your establishment
Staff	This is where you can create and delete staff accounts for your establishment.
Volunteers	This section lists all of the volunteers (e.g. parent helpers etc.) that have been added to visit forms.
Establishment Docs	This is where you can upload documents to your establishment's EVOLVE Document Library e.g. copy of your establishment's Visit Policy.

Section 2: Using EVOLVE

Section 2.1: The Workflow of EVOLVE

EVOLVE has been designed in an user-friendly way and guides you through educational visit planning from research, to form creation, to evaluating the visit and finally being able to report on it.

Home	Clicking this tab will take you back to the Home Page, where you can access your profile, messenger, contact details, and establishment dashboard
Resources	The resources tab enables you to view upcoming training session, access documents to help you plan a visit, and view previous visits for ideas.
Add Visit	Click here to add a visit. EVOLVE will intuitively hide any irrelevant sections based on your answers as you work through the form. Both staff and EVCs can create visits. *You will only see 'Add Visit' if you have a Combined EVC and Head account.*
Track Visits	Click here to track the progress of your visits (see 2.3 'How to track progress of visits')
Evaluate	Click here to evaluate visits (up to 28 days after the visit date). *You will only see 'Evaluate' if you have a Combined EVC and Head account, and if this module has been switched on by the system administrator.*
Report	This tab enables to you easily create visit reports (see 2.4 'Reporting in EVOLVE')
Visit Search	Easily find visits based on visit ID number, or name e.g. "London Zoo"

Section 2.2: How to add a visit

NB: You will only have the ability to add a visit if you have a Combined EVC and Head account.

1. Log in to your account

2. Click '**Add Visits**' (blue tab)

3. Complete the form

4. Once complete, click **[Submit]**

5. Once submitted, you can choose if you wish to send notifications (from the list, or by typing in an email address).

6. As you have a combined EVC and Head account, you will be prompted to authorise/approve the visit as you have the ability to do so.

Section 2.3: How to track progress of visits

1. Log in to your account

2. Click '**Track Visits**'
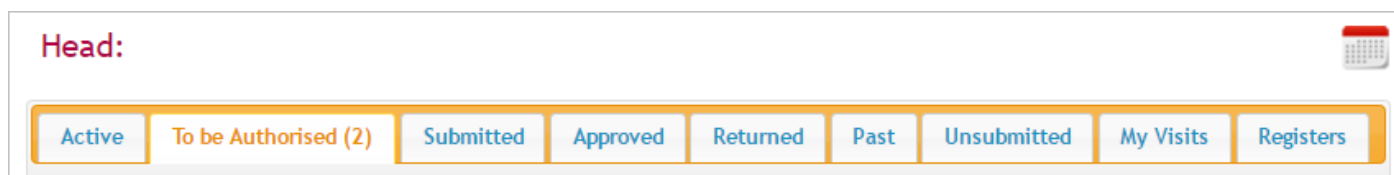
Visit Forms are displayed in different tabs to make it easy to track progress and find forms that need attention:

Active	Lists all of your establishments' visits that are running today
To Be Authorised	Lists all of the visits that are sitting in your account waiting for your authorisation. You can click on the purple 'eye' button to view a printable version of the form.
Submitted	Lists visits that have been submitted further up the chain, but that have not yet been approved
Approved	Lists all of the *forthcoming* visits for your establishment that have already been approved
Returned	Lists all of the visits that you have returned
Past	Lists visits that have already run
Unsubmitted	Lists all visits that staff users have created, but not yet submitted to you
My Visits	Provides a summary of visits that you have either led or accompanied.
Registers	List of forms awaiting register to be taken, up to 28 days after visit date.

Section 2.4: How to authorise and approve visits

When a visit form is ready for your attention, you will receive an email notification from EVOLVE advising you of this:

> Your EVC has submitted a new visit for authorisation.
>
> Establishment: Local Authority
> Departure Date: 24/07/2013
> Name: London Eye 2013
> ID: 9171
>
> Log onto EVOLVE at *yourevolvesite*.org.uk in order to process this form.

To approve or authorise a visit:

1. Click the link to your EVOLVE site in the email notification

2. Log in to your account

3. Click '**Track Visits**'

4. Click **'To be authorised'**

5. Check the details of the visit including *intended Attendees* and *Staffing* (viewed by clicking the orange 'pencil' icon)

6. Click '**Approve/Authorise'** at the bottom of the visit form if you are happy

   Please note: the button will say 'Approve' if approval for the visit is delegated to you. If the visit requires further approval, the button will say 'Authorise'.

7. Click **'Yes'** to any questions (if Head Declarations have been set)

8. Enter your PIN to authorise/approve the visit and click **'Approve'**

9. Add a note to the form if desired and click '**Continue'**.

10. You will now find the visit in your 'Approved' tab of your Track Visits.

Section 2.5: How to return a visit or gather more information

To return a visit:

1. Log in to your account

2. Click '**Track Visits**'

3. Click **'To be authorised'**

4. Check the visit and scroll to the bottom of the form

5. Click '**Return**' if you require the staff member to add further detail to the visit form

    *Please note: If you need clarification on a visit form but do not require the staff member to edit the form, you can use the fully-audited, incorporated EVOLVE notes feature. Adding a note for a staff member's attention will automatically send an email to that user (if they have their email address stored in EVOLVE) advising them of a note. To do this, click 'Add Note', select the users name, type your message and click **'Continue'**.*

6. Use the text box to indicate to the staff member why it is being returned and click '**Continue'.**

7. You will now find the visit form in your 'Returned' tab of your Track Visits.

    Please note: The staff member will need to confirm that they have read your note before using EVOLVE further, thus making it fully-audited.

Section 2.6: How to report on visits

More detailed information about reporting in EVOLVE can be found in the online help pages that can be accessed by clicking on the red [?] button at the top right of the screen.

As an overview, there are four sub-categories in the 'Reports' section.

Visit Monitoring	These reports allow you to access the visit diary, showing draft and confirmed visits. It also allows you to generate detailed reports around specific visit criteria.
Staff & Volunteer Reports	These reports allow you to access the visit history of staff and volunteers, and see an overview of those visits. You can also access the database of staff awards and qualifications recorded on EVOLVE. These reports can assist you in making judgments about staff experience and competence, and supporting and organising appropriate CPD.
Visit Summaries	These statistical reports can support visit monitoring providing aggregated data relating to types of visits, destinations, number of students involved, visit purposes etc.
Participant Reports	These allow you to generate student level reports. The visit count report can be used to support Record of Achievement portfolio generation, and the comparison reports are a valuable tool to assist with monitoring quality of opportunities within and between cohorts e.g. year group, class or gender comparisons as well as comparisons based on MIS data such as students on 'Gifted & Talented' programme etc.

Section 2.7: Where can I access further information?

If you have any queries regarding EVOLVE, these could be answered using the integrated Help Pages. You can access this by clicking on the red question mark.

These Help Pages contain articles and "How To's", which you can read through to learn more. Alternatively, you can search the Help Pages to find your answer quickly:
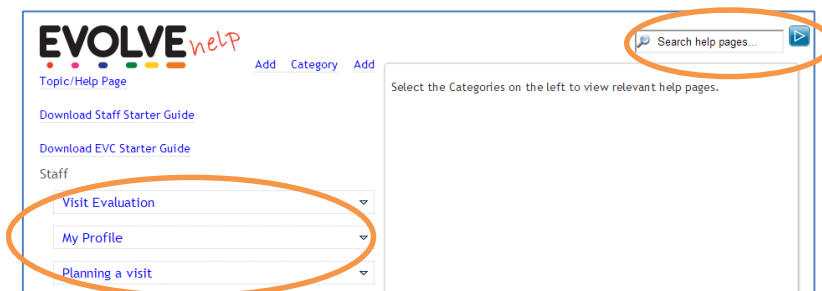
If the Help Pages cannot answer your query, please contact your site administrator directly.