



EVOLVE



Introduction to EVOLVE for EVCs



Welcome to EVOLVE!

This document has been designed as an introduction for EVCs 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 19,000 schools across the UK, and more than half a million staff have used the system to efficiently plan and approve 1.2 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 can be accessed at any time by clicking the red question mark icon at the top right of the screen in EVOLVE. An 'Introduction to EVOLVE for Staff members' is also available.

This document will explain:

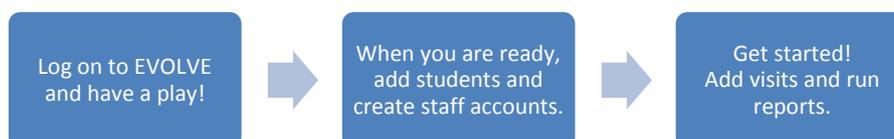
Section 1: Setting up

- 1.1 How to get to EVOLVE
- 1.2 How to set up your account
- 1.3 Introduction to Dashboard
- 1.4 How to create Staff accounts
- 1.5 How to add Students

Section 2: Using EVOLVE:

- 2.1 The workflow of EVOLVE
- 2.2 How to add a visit
- 2.3 How to track the progress of visits
- 2.4 Reporting in EVOLVE
- 2.5 Where you can access further information

Suggested work flow:



Section 1: Setting up EVOLVE

Section 1.1: How to get to EVOLVE

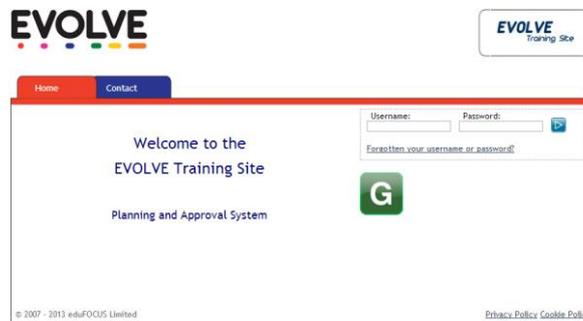
EVOLVE is a cloud based service and therefore all you need in order to be able to configure and use EVOLVE is an internet enabled device such as a PC, MAC, tablet or mobile phone. You can access EVOLVE via your dedicated web address or you can go to the following address and choose your site from the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

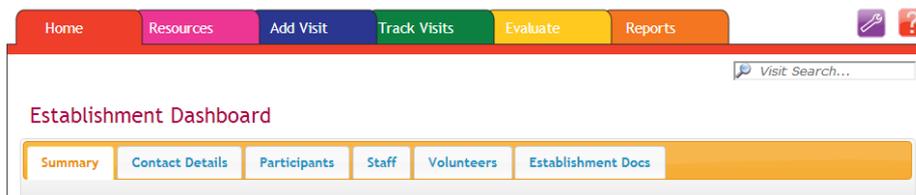
Section 1.3: Introduction to the Dashboard

As an EVC 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 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 1.4: How to create staff accounts

There are two ways you can create staff accounts:

- 1) Create a CSV file in your MIS by running a report (recommended)
- 2) Manually creating a staff list

Create a CSV file of staff details:

Option 1 (recommended): Extract data from your MIS:

- 1) To extract the data from your MIS, you will need to create a report which outputs to a CSV text file and contains the following fields **in this order**:

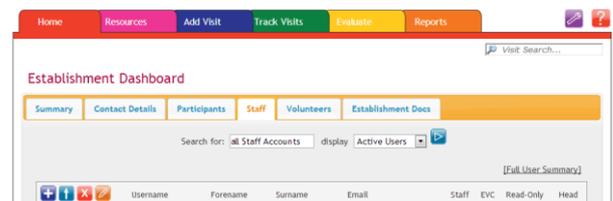
{Forename}, {Surname}, {username or email}, {password}, {Email Address}, {Gender}

- Email Address can also be used as the staff account username.
- Passwords need to be at least 8 characters long and contain at least one letter and one number
- Staff users should change their password (and username if they want) when they log on for the first time.

Please see your MIS manual for details on how to create report definitions.

Log in using your EVC account

- 2) Click the orange cogs icon to go to the Establishment Dashboard
- 3) Click on the 'Staff' tab
- 4) Click the blue arrow (pointing upwards) to bulk upload staff
- 5) Select **[Browse]**
- 6) Find the CSV file that you have just created and saved, and click **[Continue]**



Option 2: Create your own spread sheet:

You only need to do this if you are not able to export the staff details from an existing source.

- 1) Create a new Microsoft Excel spread sheet document
- 2) Create a list of staff information in the following column order:

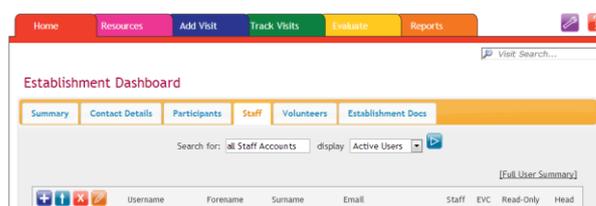
Forename, Surname, Username e.g. email address, Password, Email Address, Gender

	A	B	C	D	E	F
1	Anne	Smith	annesmith	password1		F
2	Arshed	Iqbal	arshediqbal	password1	aiqbal@la.gov.uk	M
3	Sam	Ball	samball	password1		F
4	Stewart	Perry	stewartperry	password1	sperry@la.gov.uk	F
5	etc.					

Please note:

- Do not include column headings. Please see example above
- A username cannot be accepted if it is already in use by another user. Using an email address as a username is recommended as these are unique
- Passwords need to be at least 8 characters long and contain at least one letter and one number
- Make sure to only use M or F for gender, not the full terms 'Male' or 'Female'
- Do not include parents or volunteers in this list
- Do not include any commas in the list – this will load the file in an incorrect format!

- 3) Select **[File]** and then **[Save as]**
- 4) Choose a folder to save the file to and give the file a name e.g. "EVOLVE staff list"
- 5) Then in '**Save as Type**' drop-down select "**CSV (comma delimited)**"
- 6) Click **[Save]** and close Excel.
- 7) Log in using your EVC account
- 8) Click the orange cogs icon to go to the Establishment Dashboard
- 9) Click on the '**Staff**' tab
- 10) Click the blue arrow (pointing upwards) to bulk upload staff
- 11) Select **[Browse]**
- 12) Find the CSV file that you have just created and saved, and click **[Continue]**



The staff details have now been added to your establishment and will be listed in the Staff tab. You can add, amend and remove staff at any time using the coloured buttons in the table header.

Section 1.5: How to add students to EVOLVE

There are 2 ways that you can add students to EVOLVE.

- 1) Exporting data from your MIS (recommended)
- 2) Manually creating a student list

Option 1: Export data from your MIS:

- 1) To do this, you will need to create a report which outputs to a CSV text file and contains the following fields **in this order:**

{Forename}, {Surname}, {Admission Number/UPN}, {Tutor Group}, {Gender}

- Gender must be displayed as either “M” or “F”, not “Male” or “Female”
- Do not include column headings. Please see example above
- Do not include any commas in the list – this will load the file in an incorrect format!

- 2) Log in using your EVC account
- 3) Click the orange cogs icon to go to the Establishment Dashboard
- 4) Click on the ‘**Participants**’ tab



- 5) Click the blue arrow (pointing upwards) to bulk upload students
- 6) Select [**Browse**] or [**Choose File**]
- 7) Find the CSV file that you have just created and saved, and click [**Continue**]

The students have now been added to your establishment and will be listed in the Participants tab (enter a class name in the ‘Search for’ field and click on the search button). You can manage student details at any time using the coloured buttons in the table header.

Option 2: Create a spread sheet:

- 1) Create a new Microsoft Excel spread sheet
- 2) Create a list of student information in the following column order:

Forename / Surname / Admission Number / Group eg Tutor or Class / Gender

Forename	Surname	UPN	Group/Class	Gender
Joe	Smith	789456	1B	M
Juliette	Turner	123789	1B	F
Janet	Carter	456741	1C	F

Please note:

- Make sure to only use M or F for gender, not the full terms 'Male' or 'Female'
- Do not include column headings. Please see example above
- Do not include any commas in the list – this will load the file in an incorrect format!

- 3) Select **[File]** and then click **[Save as]**
- 4) Choose a folder to save the file to and give it a filename e.g. EVOLVE pupils
- 5) Then in the '**Save as Type**' drop-down, select "**CSV (comma delimited)**"
- 6) Click **[Save]** and then close Excel
- 7) Log in using your EVC account
- 8) Click the orange cogs icon to go to the Establishment Dashboard
- 9) Click on the '**Participants**' tab



- 10) Click the blue arrow (pointing upwards) to bulk upload students
- 11) Select **[Browse]**
- 12) Find the CSV file that you have just created and saved, and click **[Continue]**

The students have now been added to your establishment and will be listed in the Participants tab (enter a class name in the 'Search for' field and click on the search button). You can manage student details at any time using the coloured buttons in the table header.

Section 2: Using EVOLVE

Section 2.1: The Workflow of EVOLVE

EVOLVE has been designed in an easy-to-use way, so that it 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.	
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).	
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

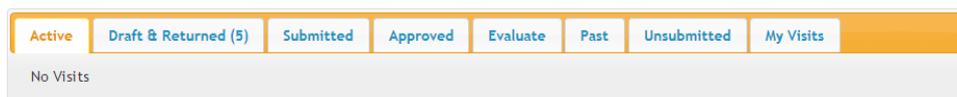
1. Log in to your account



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).

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
Draft & Returned	Lists all of the visits that are sitting in your account waiting for your action/involvement. These may be visits that you have created, but not yet submitted to the Head for authorisation, or they may be visits that staff at your establishment have created and submitted to you for review and submit to the 'Head'. You can click on the orange edit button to edit the visit form, or 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 <i>forthcoming</i> visits for your establishment that have already been approved
Evaluate	Lists any visits that have run in the last 28 days and that have not yet been evaluated
Past	Lists visits that have already run
Unsubmitted	Lists all visits that staff users have created, but not yet submitted to the EVC
My Visits	Provides a summary of visits that you have either led or accompanied.

Section 2.4: 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.

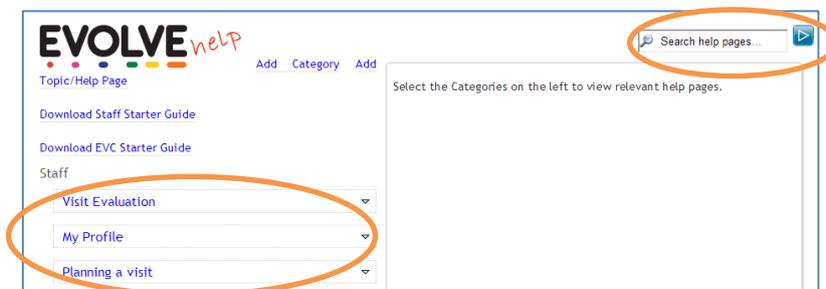
Visit Monitoring	These reports allow you to access the visit diary, showing draft and confirmed visits. It also allows you to generate detailed reports around specific visit criteria.
Staff & Volunteer Reports	These reports allow you to access the visit history of staff and volunteers, and see an overview 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 2.5: 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.
