EVOLVE: EVC Essentials

October 2012

This guidance is to support EVCs in their basic management of the EVOLVE system. It can be used in conjunction with 'CBC Staff Starter Guide' which covers profile editing, basic navigation and submitting a visit.

Guidance in relation to more advanced functions is available via the 'Help' icon:
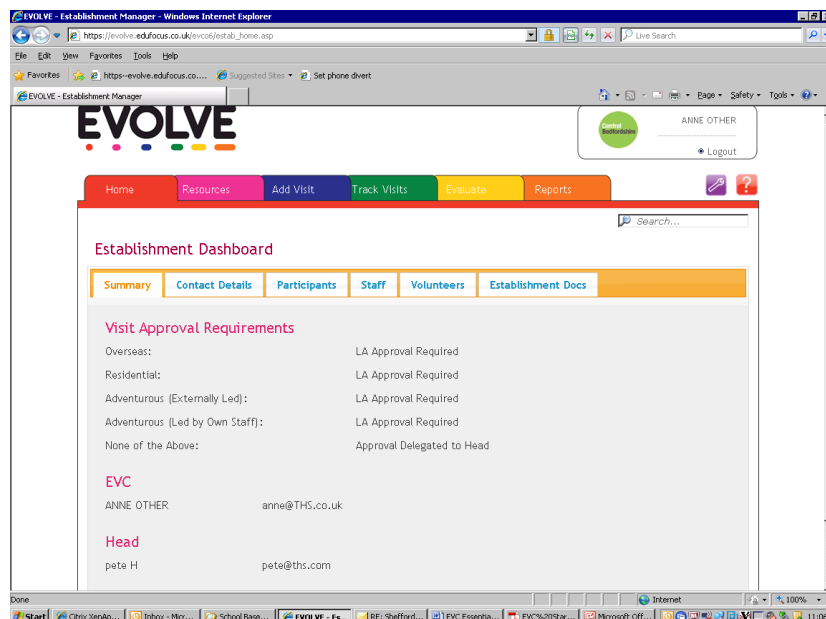
EVOLVE: EVC Essentials

For the purposes of this guide, I am logged on as Anne Other who is the EVC for Test High School

1. SYSTEM DASHBOARD

The main area to familiarise yourself with is the **System Dashboard**. This can be accessed by clicking on the system dashboard icon on the EVOLVE homepage.
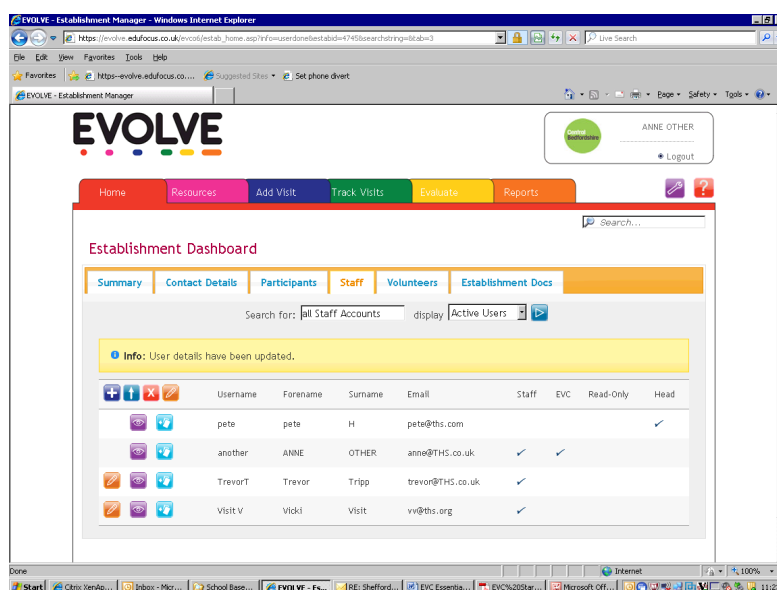
You should now see the following screen:

EDITING STAFF ACCOUNTS

As EVC, you have full editing rights for all accounts except for Head and EVC accounts. To access these, click on the **Staff** tab. You should now see the following screen:

This list shows all staff accounts for Test High School. The type of account is indicated by the ticks on the right hand side. You will notice that the Head and EVC account do not have the **edit icon** next to them:

This is because an EVC does not have editing rights for the EVC or Head. If you need to make any changes here you will need to contact your local authority EVOLVE administrator.
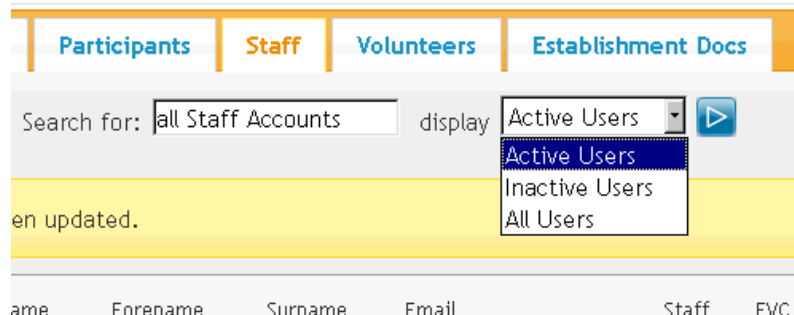

ADDING A STAFF ACCOUNT

If you need to add a staff account click on the **Add New Staff Account** icon:

A new dialogue box will appears with on screen instructions. You have the option of either creating a staff account or a 'read-only account'. If the account is for a member of staff who will organise visits, they **must** have a staff account to enable them to create a visit form. A read only account is suitable for staff who do not plan visits and have no need to post comments on visit forms. A read only account could also be given to a school governor.

DISABLING A STAFF ACCOUNT

If a member of staff leaves the school, their EVOLVE account will need to be disabled[1]. To do this, click on the **edit icon** to the left of the staff username and tick the 'Disable Account' box. If you subsequently need to access the profile (e.g if they return), it can be found by selecting 'Inactive Users' from the drop down menu at the top of the page.

MIGRATING A STAFF ACCOUNT

If a member of staff moves to another school within Central Bedfordshire, it is possible to migrate their account to the new establishment. This has the advantage that all of their visit and training history is not lost. This can only be done by your local authority EVOLVE administrator.

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[1] Please note that for audit purposes, staff with visit history cannot be deleted. Their profiles are disabled and archived on the system.

ADDING VOLUNTEERS

You may make regular use of parent volunteers to support school visits. These can be added to the system via the 'Volunteers' tab. Click on the **Add New Volunteer** icon:
Please note that it is vitally important that volunteers are added to the system and to visit forms in order that they are included in insurance arrangements.

ADDING ESTABLISHMENT DOCUMENTATION

You are able to create your own library of establishment documents on EVOLVE. These will only be visible to staff within your own school. This area is suitable for storing school guidelines and policies, standard operating procedures, risk assessments etc.

To upload a document, open the **Establishment Docs** tab then click on the **Upload File to Library** icon. You are then given the option to browse you own networks for the file to be uploaded.

Staff wishing to retrieve a file will need to go to the **Establishments' Docs** tab in the **Resources** section as shown below:
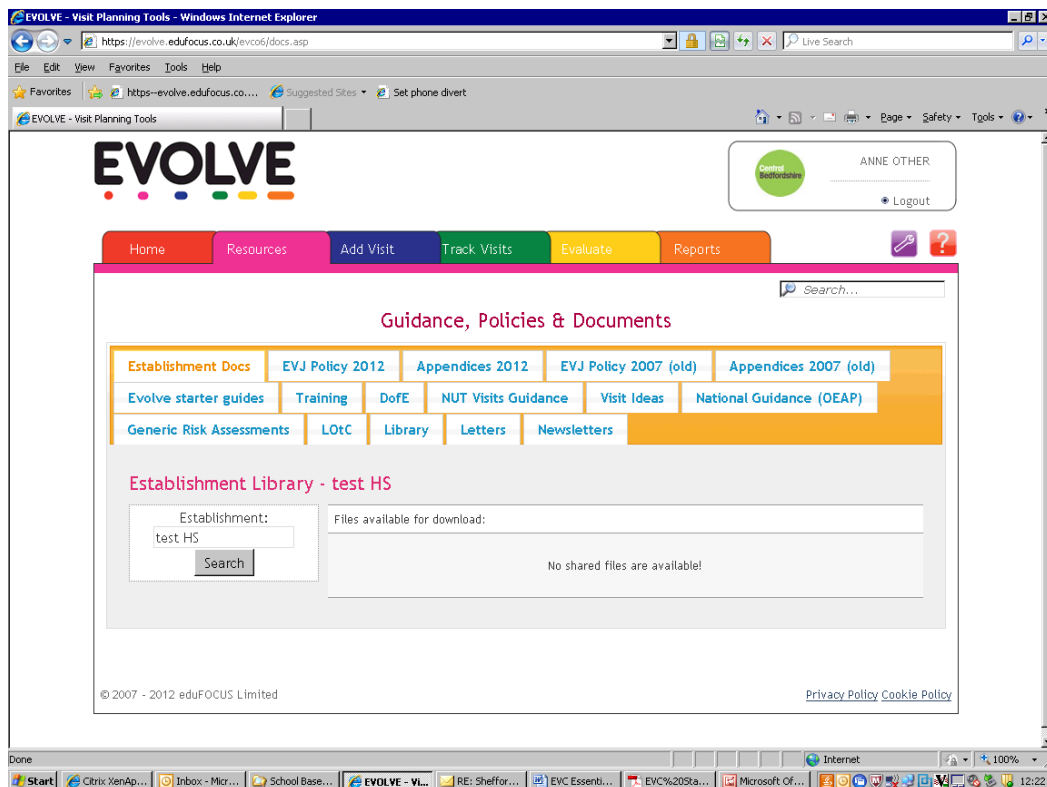
2. TRACK VISITS

To track visits you will need to open the **Track Visits** tab.

If you are an EVC who also has a staff account (ie you also plan and lead visits) you will be faced with the screen shown below. If you only have an EVC account you will go straight to the screen at the bottom of the page.

To be able to approve visits you will need to select the EVC option. (The **Staff** section will contain any incomplete visit forms that you have created personally). You now see the following screen:
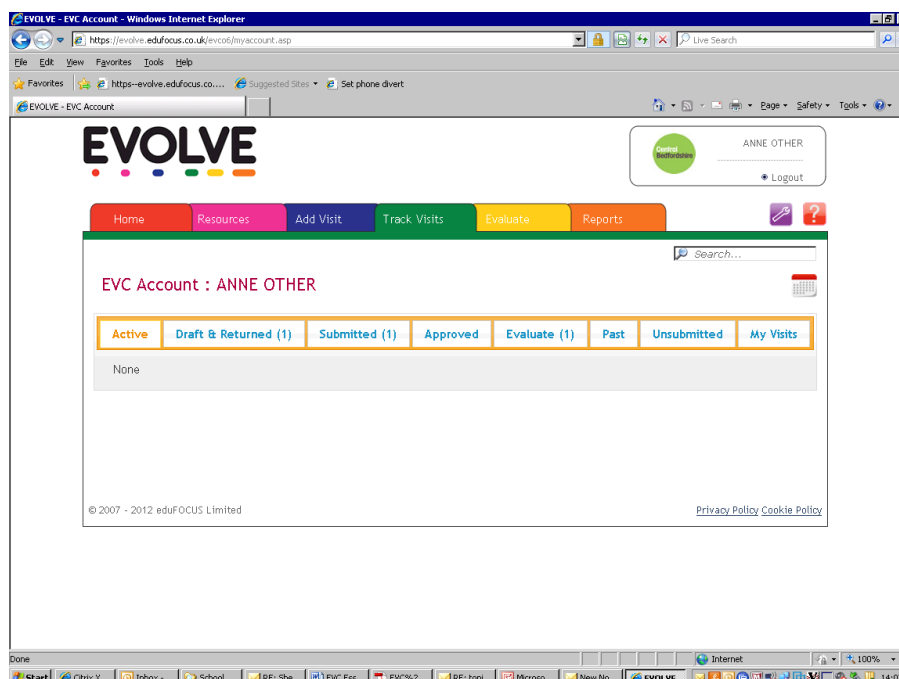
What does this mean?

Draft & returned is the EVC 'Inbox'. This is where you look for visits that are awaiting your approval. The number in brackets denotes how many visits are waiting.

Submitted is the section where visits that you have approved (but are still awaiting the Head's authorisation) can be tracked.

Approved is where visits that have had final authorisation from the Head can be tracked.

Evaluate. Once a visit has happened, the visit form will stay in the Evaluate section for 28 days. During this time the Group Leader needs to go back in to complete the evaluation. Nobody else can complete the evaluation although the EVC can monitor and remind as necessary.

APPROVING VISITS

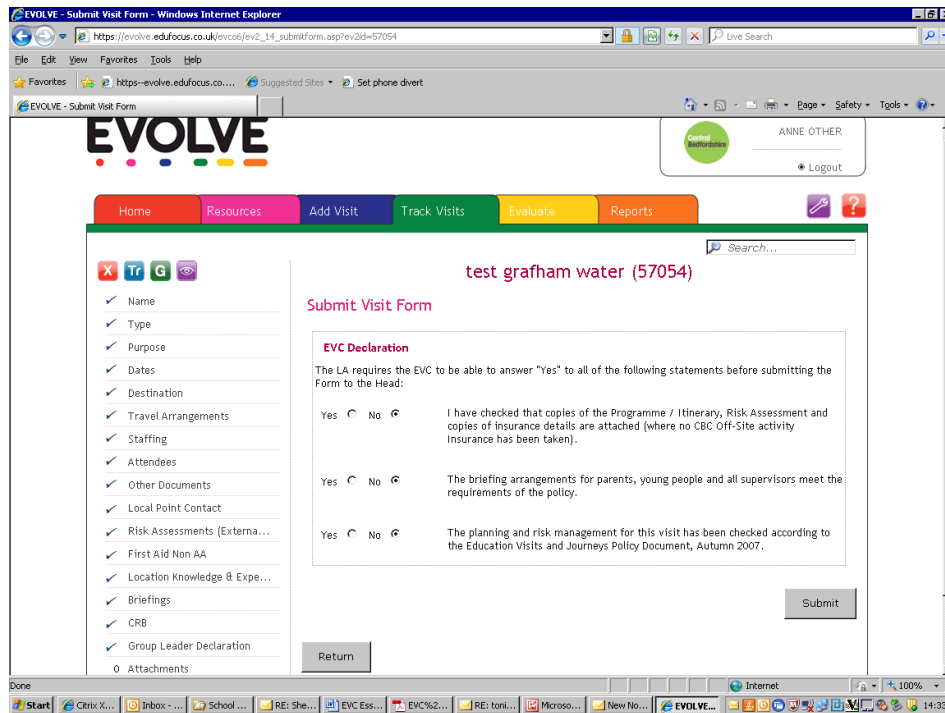Open up the **Draft and Returned** tab:
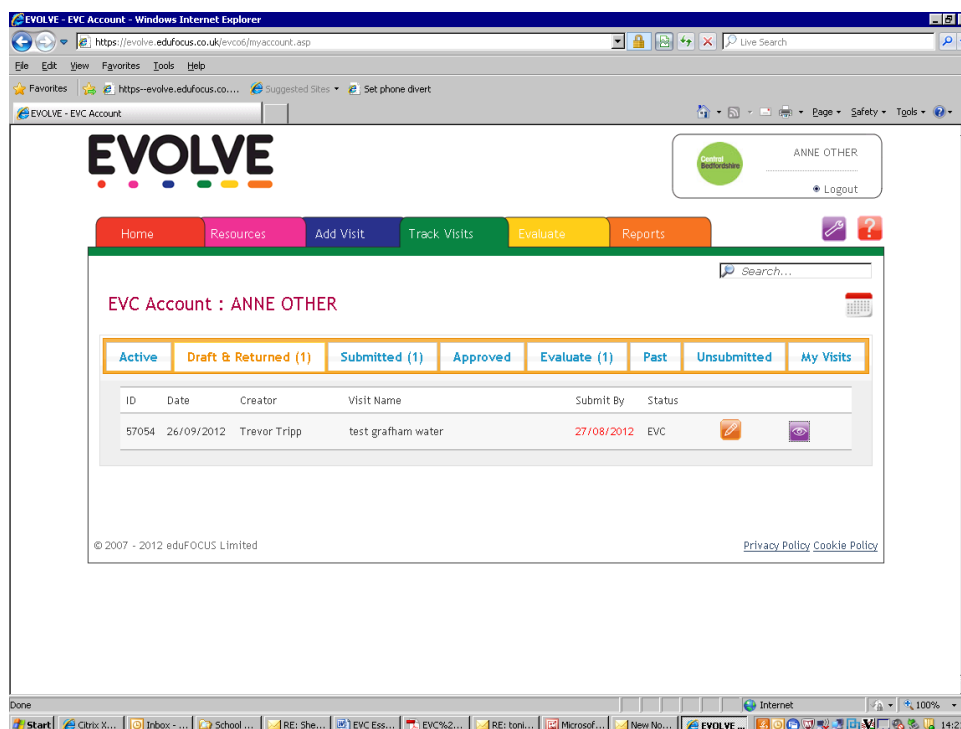
By clicking on the purple eye icon, the visit form will open up. Check the contents of the form, check the attachments and then scroll to the bottom of the visit form where you will see:

You now have three options.
1. If for any reason the visit is cancelled and unlikely to be rescheduled, click on the **Delete** button to clear it off of the system.
2. If there are documents missing or if any of the fields need amending, you can return the visit to the Group Leader for further editing by clicking the **Return** button.
3. If you are satisfied that all planning and administration is complete then click the **Submit** button. This will start the submission process after which, control of the form will pass to the Head.(ie you as the EVC will no longer have the **Return, Delete** or **Submit** options)
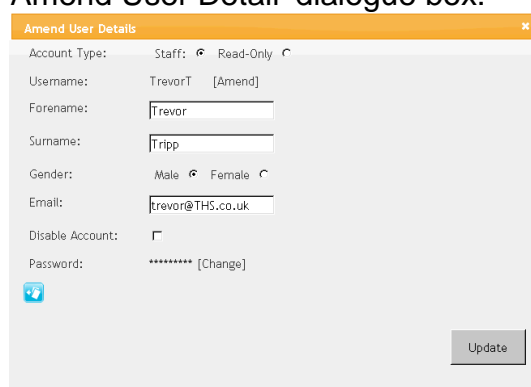
In order to complete the submission you will be required to complete an **EVC Declaration**:

RESET PASSWORDS

If a member of staff has forgotten their password, you are able to reset it to enable them to access their account. They can then personally reset it to something memorable.

1. Navigate to the System Dashboard > Staff tab (as described on page 3.)
2. Click on the edit icon immediately to the left of the staff account you want to access
3. You will now see the 'Amend User Detail' dialogue box:

4. Click on '[change]' and follow on-screen instructions

3. ADVANCED EVC FUNCTIONS

The following functions can also be operated by the establishment EVC. Excellent instructions already exist on EVOLVE and can be found by clicking on the **Help** icon:

By typing in the **'Search help pages'** box you can find instructions for
- Reports
- How to enter a joint visit
- Evolve Gateway
- Adding participants