EVOLVE: CBC Staff Starter Guide

September 2012

This guidance is aimed at school staff who are new to EVOLVE. It is a step by step guide that will enable staff to learn the basics of navigating the site and planning visits.

More detailed advice can be found under the help tab

# Evolve Training for Beginners

Logging on

1. Navigate to: www.centralbedfordshirevisits.org.uk

2. Enter Username e.g Alan Brown's username would be : **BrownA.** (There are occasional exceptions to this and some schools may have a different policy. If you are unable to log on then please ask your EVC or check you log-in details top-right of this page).

3. Enter password. The default is '**password1**' (all lower case and no gaps).

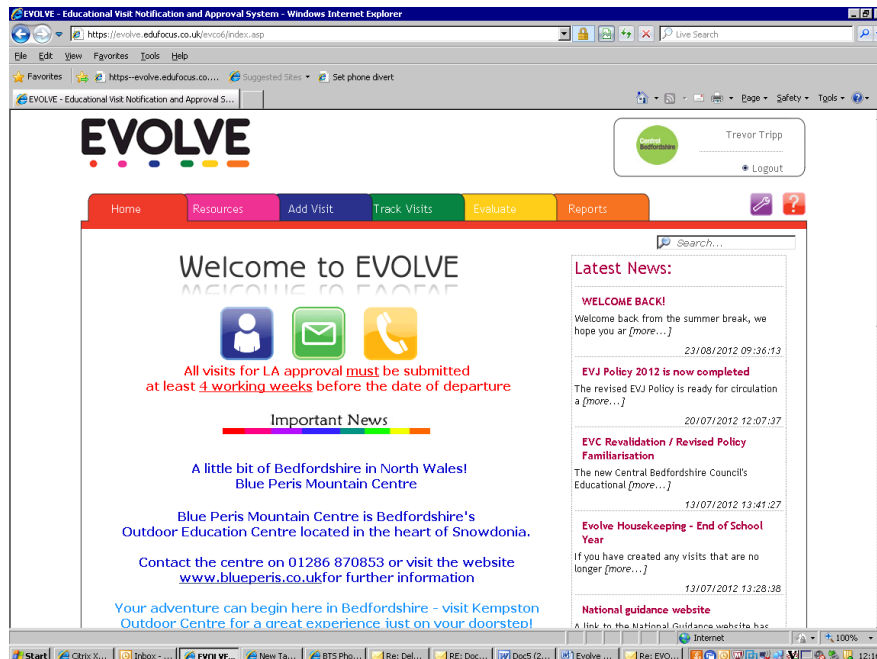4. Click 'x' to dismiss any pop ups
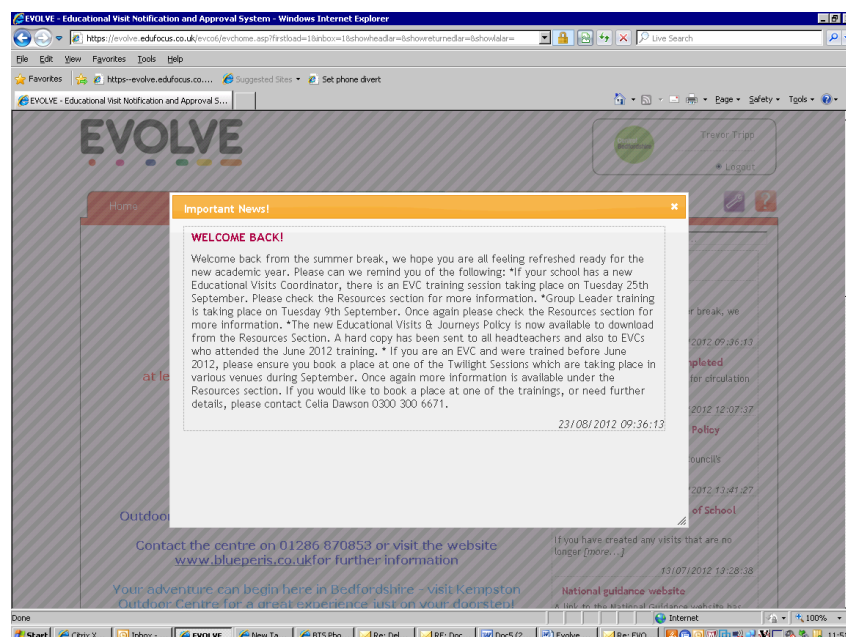
5*. If* you see a message screen (below) you will need to confirm you have read the message before proceeding to the home page. If there is no message screen, proceed directly to 7.
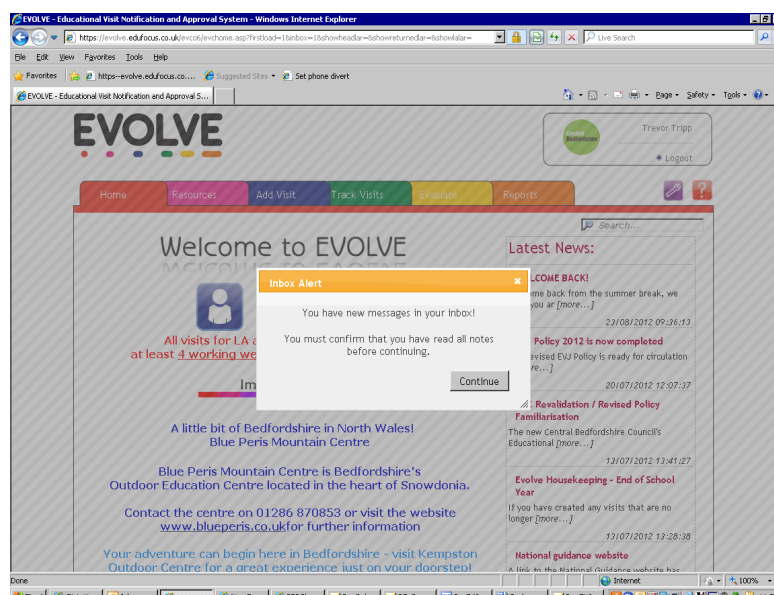
6. Click on the purple eye to open up the message. Click 'x' to close message.
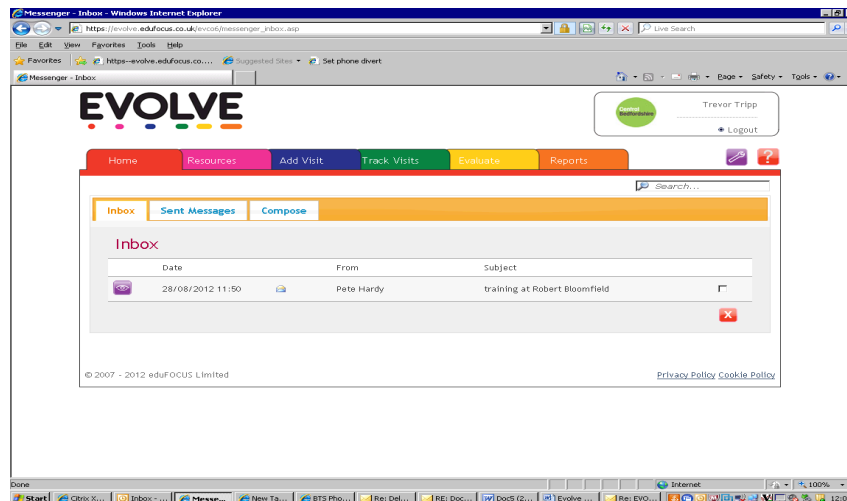
7. Click the red 'Home' tab. You should now see the homepage

Edit Your Profile

1. Click on

2. You are able to   edit personal details (really important that your e-mail address is correct!)
                       Change your password
                       Add any qualifications (including upload of scanned certificates)

Resources

1. Click on the 'Resources' tab.
2. Click on '**Guidance, Policies and Documents'** icon:

Here you are able to: - View your own establishment's documentation
- View / download CBC Policies and Appendices
- View / download generic risk assessments
- Access national guidance
- View / download EVOLVE starter guides

3. Click on 'Resources tab.
4. Click on '**Search Evolve Visit History'** icon:

Here you are able to search the system for previous visits using a number of search criteria. The most useful example would be: a. Select 'Independent Providers'
b. Select (e.g) 'Grafham Water Centre'
c. Click continue
d. You can now see a list of school visits to Grafham
e. Click on the purple eye to view select details

5. Click on 'Resources tab.
6. Click on '**Training**' icon:

Here you are able to check on forthcoming training opportunities.

Adding a Visit

Please note that at many points in this process, step by step guidance can be obtained by clicking on the info icon:

1. Click on '**Add Visit**' tab.
2. Add the name of the visit. Please indicate if this is a practice. E.g: Test – Grafham Water. Once you have entered a visit name and clicked 'continue', the visit is ***automatically saved.***

3. Select the visit type. Please note: -if residential, overseas or adventurous is selected then a higher level of approval is required.
-if 'adventurous led by <school> staff is selected, you will be required to complete an ALF form (automatically generated).
4. you should now see the following Edit Screen:

5. Click on the name of each 'module' in turn and provide information as requested. *Remember to click on the info icon (where present) for an explanation.* Here are some useful tips:

- In the left hand column is a checklist detailing your overall progress. You will not be able to submit the visit to your EVC until **all** boxes are ticked.
- If you want to view the actual visit form, click on the purple eye at the top of the checklist, you will now see the following screen:

You are not able to edit the visit form directly. To return to the Edit Screen' click on the pencil icon:
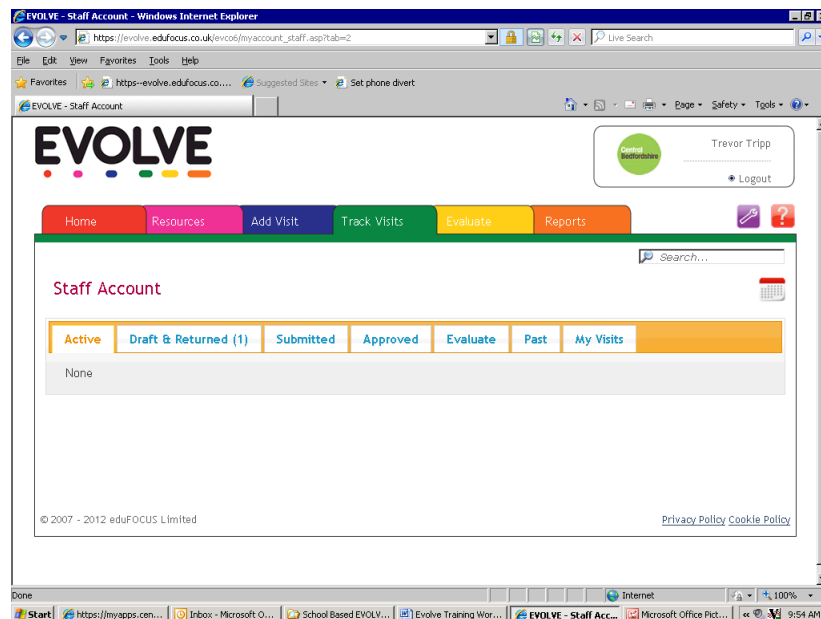
Submitting a Visit Form for Approval

1. In the 'Edit' screen, ensure that every module in the checklist has a tick next to it.
2. Ensure you have uploaded all documentation appropriate to the type of visit.
3. Open up the 'Submit Form' module and click 'Submit'

Tracking Visit Forms Once Created

1. Click on the 'Track visits' tab

2. You should now see the following screen:

3.The screen shown *above* tells me I have one visit form that has not yet been submitted to the EVC for approval – Draft & Returned(1).
 The screen shown *below* tells me I have one incomplete visit form not yet submitted -Draft & Returned(1) and one visit that has already been sent to the EVC for approval – Submitted(1)
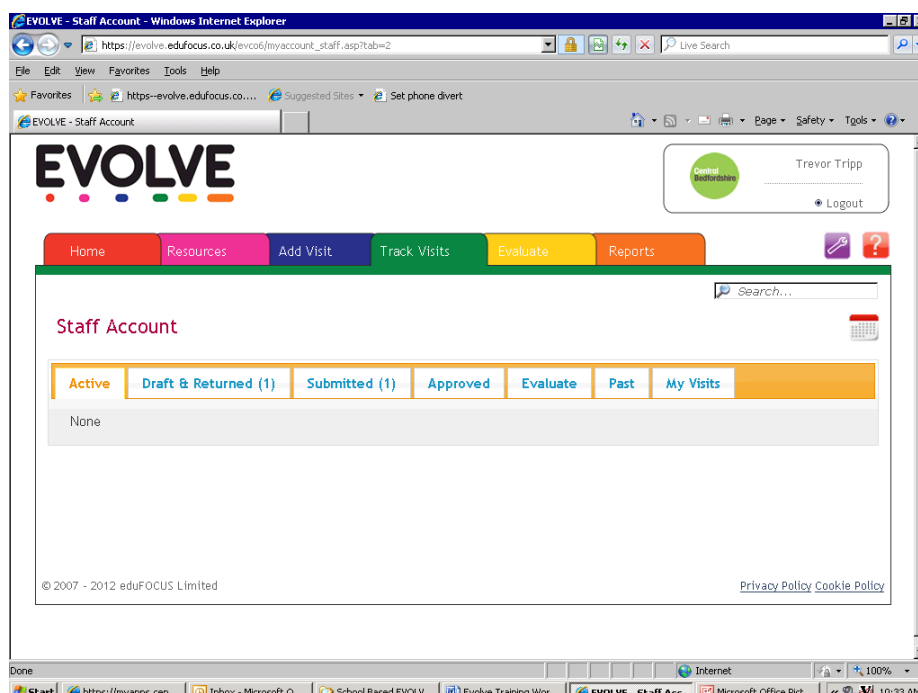
4. To view or edit the incomplete form click on the 'Draft & Returned' tab. You will now see the following screen:
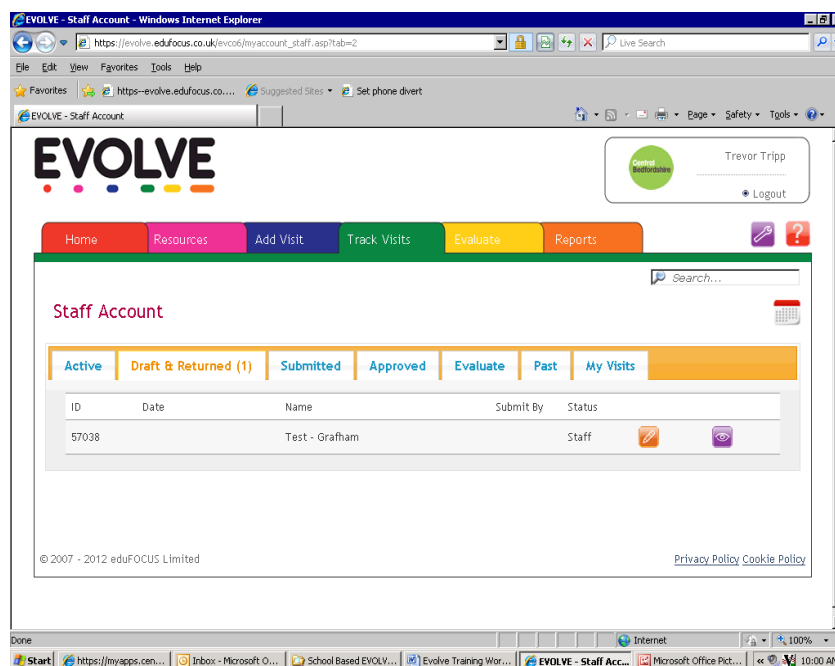
5. Click on the purple eye and the visit form will open up or else click on the pencil which will take you to the 'Edit' screen for that visit.

Evaluation of Visit

Once the visit is complete you have 28 days to complete your evaluation. Any visit evaluations pending can be found under the 'Evaluate' tab.