

# EVOLVE *visits*

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## EVOLVE Staff Starter Guide

### How to Log In to EVOLVE

Welcome to EVOLVE!

Your System Administrators will have given you your login details to access EVOLVE, and the following instructions will enable you to log in.

#### Step 1

Go to [www.evolve.online](http://www.evolve.online) or [evolve.edufocus.co.uk](http://evolve.edufocus.co.uk)

#### Step 2

Choose your Establishment, Local Authority, or Trust from the drop down menu.

**TIP:** Please note that your establishment will only be listed by name if you have Premium EVOLVE. If you buy Standard EVOLVE directly from us, please go to [www.evolvevisits.co.uk](http://www.evolvevisits.co.uk) or choose EVOLVE Visits from the drop down menu.

#### Step 3

Enter the username and password given to you by your System Administrator:



## Step 4

Click  to continue.

## Step 5

Success! You are now logged in to EVOLVE.

If you are unable to log in to EVOLVE, please click Reset/Forgotten your password?, and follow the instructions on screen:



Home Contact

Welcome to EVOLVE

Username: Password: 

Username Password

[Reset/Forgotten your password?](#)

Should you have any access issues, please select the blue Contacts tab to view the details for your internal System Administrator / Key Contact for EVOLVE.

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## EVOLVE Staff Starter Guide

### Introduction to EVOLVE icons

#### Visit Form Icons:



View



Edit



Add



Visit Manager



Transfer Form (by department, school, or form creator)



Delete form



Information



Print



Download Visit Form as PDF



Clone visit form (where this module is switched on)



Re-order

#### Home Page icons:



My Profile



Messenger



Contact



Dashboard (EVC and Head Users Only)



Visit Diary



EVOLVEaccidentbook (Requires subscription)

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## EVOLVE Staff Starter Guide

### How to Research Visits

EVOLVE contains a huge amount of information to support you in visit planning. Whether that is perusing previous visits run by your establishment, or searching our national database of providers (Kaddi.com) which includes more than 20,000 provider reviews, EVOLVE will enable you to quickly find the information you need.

To get started:

#### Step 1

Log in to EVOLVE

#### Step 2

Click [Resources]

#### Step 3

Use the icons to search and view further information



Highland Academy eduFOCUS Admin  
Aim high - Reach your potential Logout

Home Resources Add Track Evaluate Reports NG ?

Find Student ... Visit Search ...

What do you want to do?

NG kaddi SEARCH

Guidance & Document Library\*

OEAP National Guidance

Kaddi - Places To Go, Things To Do - including over 20,000 reviews

EVOLVE Visit Search - Use this to find previous visit forms

Training\*

\*Content is added and maintained by your EVOLVE System Administrators.

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## EVOLVE Staff Starter Guide

### How to Add a Visit Form and Submit the Form for Approval

#### Step 1


Log in to EVOLVE.

#### Step 2

Click [Add]:



#### Step 3

Answer each section as directed clicking on the [Continue] icon as each section is completed. Click the Information  icons for more information, where they appear.



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Joe Bloggs  
Logout

Home Resources Add Track Evaluate Reports

Find Student ... Visit Search ...

**Staff Guide (3036)**

**Attachments**

The following Documents may be attached to this visit form:

Planning / Itinerary  +

Risk Assessments  +

Letters to parents  +

Other  +

Continue

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**NB:** If Outline Approval is enabled for your school (EVOLVEpremium and EVOLVE+/standard customers only) approx 7 sections of the visit form will appear to be completed as shown below. These sections will need to be completed and ticked before the visit can be submitted for Outline Approval.

Once Outline Approval has been granted the visit form will be in the Draft tab of your Track tab. All of the remaining sections on the visit form will now appear to be completed so the visit form can be submitted through the secondary approval process.

Purpose  
 Dates  
 Venues/External Providers  
 Main Venue/Destination  
 Travel Arrangements  
 Staffing  
 Attendees  
 Attachments  
 Submit Form

**Head Approval Required**

**Intended Attendees**

Attendee Age Range :

Note: To select multiple options hold down the [Ctrl] button on the keyboard whilst clicking the appropriate options.

Intended Numbers: Male:  Female:  Total :

Register:

Continue

### Step 4

## Attendees

In the Attendees section, you are required to select the Age Range and the Intended Numbers. It is possible to add specific students (if you have students on your EVOLVE) by clicking on the Edit Pencil.

The screenshot shows the 'Attendees' section of the EVOLVE system. At the top, there are navigation tabs: Home, Resources, Add, Track, Evaluate, and Reports. Below these is a search bar for 'Find Student ...' and a 'Visit Search ...' button. A sidebar on the left contains a list of filters, with 'Attendees' highlighted. The main content area is titled 'Staff Guide (3036)' and shows 'Intended Attendees' with a dropdown menu for 'Attendee Age Range' (options: Year 2 to Year 10) and 'Intended Numbers' (Male: 10, Female: 10, Total: 20). There is also a 'Register:' field and a 'Continue' button.

This will take you to the Names page where you are able to amend Staff and Other Accompanying Adults.

## Staffing

The screenshot shows the 'Staffing' section. It has two rows, each with an edit pencil icon. The first row is 'Accompanying Staff:' with the text 'Emma Lawrence, Staff User, eduFOCUS Admin,'. The second row is 'Other Accompanying Adults:'.

## Participants

[Manage Sub Groups](#)

Show on Register:  Student ID  Telephone  Email  Student Mobile  Student E

The screenshot shows a table header for participants. It includes an edit pencil icon and the following columns: Blanket Consent, Forename, Surname, Sex, Group, and Year.

If you click on the Orange edit pencil under Participants, you will be able to select students by name, class, gender etc. If you do not know which students will be on the trip, you can add students at any time during the approval process.

## Step 5

You won't be able to submit the form until all required sections are complete and have ticks showing against them - EVOLVE will tell you when you try to submit if you are missing anything!

**NB:** The only sections that do not require a tick are the Attachment section and the Event Specific Plan module (if enabled on your EVOLVE).

Once complete, click [Submit] to submit the form.

## Step 6

Once submitted, you can choose if you wish to send notifications to an additional recipient by typing in an email address. Click [Continue] to send the standard and any additional notifications.

**NB:** Do not untick the pre ticked names as this would mean that no notification will be sent to alert the EVC that a visit form has been submitted to them for action.



### Submit Form - Step 2 of 2: Send Email Notifications

The form has been submitted to the EVC, but you should now select the staff that you want to receive an automatic email notification to alert them to the fact that the form has been submitted for their attention.

- Joe Bloggs (info@edufocus.co.uk)
- HoD User (No valid email address registered! )
- EVC User (evc@email.com)

If you wish to send an email notification to another user then enter their email address below :

Continue

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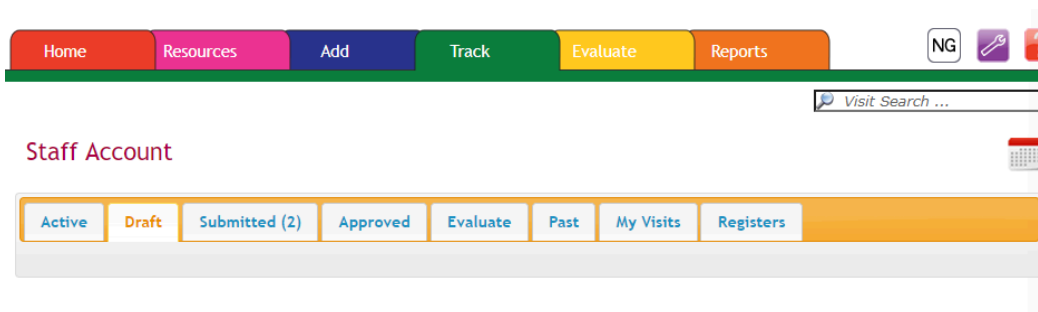
### How to Track the Progress of a Visit

#### Step 1

Log in to EVOLVE

#### Step 2

Click [Track]. Visit forms can be found under different tabs:



**Active:** Lists your activities running today.

**Draft:** Lists all forms in your account waiting for your action/involvement. These may be visits you have created, but not yet submitted to the EVC for authorisation, or they may be visits the EVC has returned to you for further action. You can

click on the Edit button  to edit the visit form, or click View  to view a printable version of the form.

**Submitted:** Lists forms which have been submitted further up the chain, but have not yet been approved. Once you have submitted

a form to your EVC, you will no longer have the option of editing the form. Your EVC will be able to edit any details if required, once they have submitted the form to the Head, the form will be locked from editing and would need to be returned to either you or your EVC in order for any changes to be made.

**Approved:** Lists all forthcoming activities which have received final approval.

**Evaluate:** Lists any activities which have run in the last 28 days and have not yet been evaluated.

**Past:** Lists activities which have already taken place.

**My Visits:** Provides a summary of activities you have either led or accompanied.

**Registers:** Lists forms awaiting register to be taken (up to 28 days after activity date).

### Step 3

Click View 

### Step 4

Further information can be found in the 'Approval Chain' at the bottom of the form and in the Notes.

**Approval Chain**

Visit Form created:	@ 21/08/2019
Submitted to EEC:	21/08/2019 18:12:04
Submitted to Head by:	@ 23/08/2019 09:27:50
(Delegated) Approved by Head:	@ 23/08/2019 10:06:12

## Step 5

If you are associated with a particular visit, you can also use the Visit Search box in the top right hand corner to search for the visit form by Name or ID Number, this brings up the below summary details including the current Status:

The screenshot shows the EVOLVE system interface. At the top, there is a navigation bar with buttons for Home, Resources, Add, Track, Evaluate, and Reports. To the right of the navigation bar are icons for NG, a key, and a question mark. Below the navigation bar is a search box containing the text 'Museum of London'. Underneath the search box, the word 'Search' is displayed in red. To the right of 'Search' is a button labeled 'Advanced Search'. Below the search box is a table with the following data:

ID	Department	Visit Date	Name	Status
877	Highland Academy	23/11/2020	Museum of London	EVC

Below the table, the text '1 - 1 (1)' is displayed. At the bottom left of the screenshot, the copyright notice '© eduFOCUS Limited 2007-2021' is visible. At the bottom right, there are three links: 'Change Log', 'GDPR Policy', and 'Privacy Policy'.

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## EVOLVE Staff Starter Guide

### How to Find and View a Visit Form

There are several ways you can locate your visit form.

#### Diary

You can view your visit form by accessing the calendar from the homepage:

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eduFOCUS Admin

Logout

The screenshot shows the EVOLVE homepage with a navigation bar containing tabs for Home, Resources, Add, Track, Evaluate, and Reports. Below the navigation bar, there is a search bar for students and a search bar for visits. The main content area features a 'Welcome to EVOLVE' message and a row of icons representing various functions: a person, an envelope, a phone, gears, a calendar (highlighted with a yellow box), and a medical cross. A 'Local Area Visits' notification is also visible on the right side of the page.

#### Track

You can locate your trip form via Track, using the different tabs to help you:



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Home Resources Add Track Evaluate Reports NG ?

Find Student ... Visit Search ...

HoD Account : eduFOCUS Admin

Active Comment Outline Approval Draft (16) Submitted (3) Approved (2) Evaluate (11) Past

Unsubmitted My Visits Registers (20)

ID	Date	Creator	Name	Type	Status
1889	11/03/2020	eduFOCUS Admin	Supermarket Visit for yr4	Local	
1890	23/03/2020	eduFOCUS Admin	Year 7s - Park	Local	

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Click on the purple eye symbol to view the visit form.

## Visit Search

You can use the Visit Search tool found on the top right of EVOLVE. You can search by school name, visit ID, or visit name:

EVOLVE Highland Academy eduFOCUS Admin  
 Aim high - Reach your potential Logout

Home Resources Add Track Evaluate Reports NG ?

Find Student ...

Should the search not return any results, you can use the Advance Search option to check whether it has been cancelled or deleted:

Home Resources Add Track Evaluate Reports NG ?

Find Student ... geography year 10

Search

Search for:

Type

- Residential
- Overseas
- Adventurous
- Adventurous (Estab Staff Led)
- Local/Other
- Onsite

Status

- Staff
- HoD
- EVC
- Returned
- SMT
- Approved by SMT
- Approved via Delegation
- Processed
- Cancelled
- Deleted

Sort:

Search

ID	Department	Type	Visit Date	Name	Status
0 - 0 (0)					



[EVOLVEshop](#) [EVOLVEpy](#) [EVOLVEsports](#) [EVOLVEclubs](#)

**Highland Academy** Joe Bloggs  
 Aim high - Reach your potential  
[Logout](#)

Home Resources Add Track Evaluate Reports NG ?

Find Student ... Year 10 Geography

Search

Search for:

Type

- Residential
- Overseas
- Adventurous
- Adventurous (Estab Staff Led)
- Local/Other
- Onsite

Status

- Staff
- HoD
- EVC
- Returned
- SMT
- Approved by SMT
- Approved via Delegation
- Processed
- Cancelled
- Deleted

Sort:

Search

ID	Department	Type	Visit Date	Name	Status
2242	Geography	Visit	23/09/2020	Year 10 Geography Trip to Manchester	Cancelled

If the visit has been cancelled by mistake, you are able to return the form to yourself.

EVOLVE System -> Joe Bloggs - Read @ 11/06/2020 11:16:59 Sent @ 11/06/2020 07:30:22

This is an automatic alert from EVOLVE sent to you because this form requires your attention. This event is due to take place in 7 days time, but the form has not yet been completed/approved.

**Alert:** This Visit has been cancelled! Please see the notes.

To recover a deleted form, please contact the EVOLVE Support Team on [info@edufocus.co.uk](mailto:info@edufocus.co.uk) or on 01394 775250.

# EVOLVE *visits*

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## EVOLVE Staff Starter Guide

### How to Create a Register

There are two ways to build a register.

**OPTION 1)** If you already know which students will attend, you can build the register manually within EVOLVE. This help article will show you how.

**OPTION 2)** If you the activity is available for booking and students can themselves decide if they wish to take part, you can promote the activity to parents and students and allow them to make bookings. This method builds the register (or waiting list!) automatically. Please note that unless you purchase EVOLVEpremium this will involve the purchase of an additional module EVOLVE Promote & Pay. To find out more regarding EVOLVE Promote and Pay, [click here](#).

To create a register where the students are known to be attending:




#### Step 1

Log into EVOLVE

#### Step 2

Navigate to or search for your visit form

#### Step 3

Click the Visit Manager  icon, or if necessary click the purple eye symbol  to view the pdf version of the visit form and then click the Visit Manager  icon in the top right hand corner of your screen.



## Step 4

Click [Names] at the top of the screen:

**EVOLVE** Highland Academy  
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Register **Names** Promote Consent Comms Payments [Visit Form](#)

**Names: Year 12 Trip to New York - 2020 (1918)**

Date: 15/06/2021 - 29/06/2021  
Organiser: eduFOCUS Admin

**Staffing**

Accompanying Staff: Staff User, Trevor Smith, Test Test, EVC User.  
 Other Accompanying Adults:

**Participants**

[View Waiting List](#)  
[Manage Sub Groups](#)

Show on Register:  Student ID  Telephone  Email  Student Mobile  Student Email  A/House  DoB  InLEACare  PP  Eligibleforfreemeals  Dietaryneeds  Medical  Medicalnotes  SEN

[Show Consent Questions](#)

<input checked="" type="checkbox"/> Blanket Consent	Consent	Forename	Surname	Sex	Group	Year
Showing 0 Participants out of 0						

## Step 5

In Participants table, click



## Step 6

Search by Student name, group, class, academic house or custom group

EVOLVE Highland Academy  
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Register Names Promote Consent Comms Payments Visit Form

Manage Register : Year 12 Trip to New York - 2020 (1918)

1: Search :  
Student Name  
Gender: All  
Year Group: Any Group  
Tutor Groups: Any Group  
Classes: Any Group  
Academic Houses: Any Group  
Custom Groups: Any Group  
Search  
Add by Student ID

2: Select:

3: Update :  
 Select All  
Continue

## Step 7

Select Student/s:

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Register Names Promote Consent Comms Payments Visit Form

Manage Register : Year 12 Trip to New York - 2020 (1918)

1: Search :  
Student Name: test  
Gender: All  
Year Group: Any Group  
Tutor Groups: 7a  
Classes: Any Group  
Academic Houses: Any Group  
Custom Groups: Any Group  
Search



2: Select: Results for 'test' in Tutor Group 7a.

UPN	Forename	Surname	Sex	Year	Tutor Group	Select All
147258369	Clubs Test	Student	F	7	7a	<input type="checkbox"/>
1	Test	Student	F	7	7a	<input type="checkbox"/>
12345	Notif	Test	F	7	7a	<input type="checkbox"/>

3: Update :  
 Select All  
Continue

## Step 8

Click [Continue]

Register **Names** Promote Consent Comms Payments
Visit Form

Manage Register : Year 12 Trip to New York - 2020 (1918)

**1: Search :**

Student Name:

Gender:

Year Group:

Tutor Groups:

Classes:

Academic Houses:

Custom Groups:

**2: Select:**

Results for 'test' in Tutor Group '7a'.

UPN	Forename	Surname	Sex	Year	Tutor Group	Select All
147258369	Clubs Test	Student	F	7	7a	
1	Test	Student	F	7	7a	
12345	Notif	Test	F	7	7a	

**3: Update :**

Select All



Clubs Test Student

Test Student

Notif Test

## Step 9

Success! Your Register has been created:

Register **Names** Promote Consent Comms Payments
Visit Form

Names: Year 12 Trip to New York - 2020 (1918)

Date: 15/06/2021 - 29/06/2021  
 Organiser: eduFOCUS Admin

**Staffing**

Accompanying Staff: Staff User, Trevor Smith, Test Test, EVC User.

Other Accompanying Adults:

**Participants**

Show on Register:  Student ID  Telephone  Email  Student Mobile  Student Email  A/House  DoB  InLEACare  PP  Eligibleforfreemeals  Dietaryneeds  Medical  Medicalnotes  SEN

<input checked="" type="checkbox"/> Blanket Consent	Consent	Forename	Surname	Sex	Group	Year
		Clubs Test	Student	F	7a	7
		James	Abbott	M		Year 7
		Shane	Naylor	M		

# EVOLVE *visits*

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## EVOLVE Staff Starter Guide

### How To Clone / Copy a Visit Form

PLEASE NOTE - Visit Cloning is an optional feature in EVOLVE. If you DO NOT have access to Visit Cloning, this will be because your System Administrators have chosen NOT to enable this function.

When you preview a form, you will see there is an extra "COPY" icon in the row at the top (white papers on a blue background). When you click on this it will open the Clone screen.



#### Natural History Museum Visit

##### Visit Type & Date

ID:	37798
Establishment:	eduFOCUS Limited
Overseas:	
Residential:	
Adventurous:	

##### Staffing & Participants

Leader Name:	eduFOCUS Admin (01234 78910)
Attendee Group:	
Attendees on Reg:	0
Intended Attendees:	(M= F=)

Once you confirm you wish to clone the form, a new form will be created on EVOLVE using the following details from the original:

*Name, Type, Purpose, Intended Outcomes, Age Group, Intended attendees (total, male and female), destination/providers, travel method and travel companies.*

The new form will be created in the user's Staff account and can be edited as normal prior to submission but still requires the staff member to add any accompanying staff, volunteers, student names, attachments etc and any other custom questions you may have built in.

1. View existing form
2. Click the clone icon (two white sheets on a blue background)
3. Confirm you want to copy form (yes)
4. Complete the remaining details (use the edit pencil to do this)

