



**Introduction to EVOLVE  
for Staff**



## Welcome to EVOLVE!

This document has been designed as an introduction for staff 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, academies, colleges, trusts and Local Authorities 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. An ‘Introduction to EVOLVE for EVCs’ is also available.

### This document covers:

#### Section 1: Setting up

- 1.1 How to get to EVOLVE
- 1.2 How to set up your EVOLVE account
- 1.3 How to set up SSO

#### Section 2: Using EVOLVE:

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

# Section 1: Setting up EVOLVE

## Section 1.1: How to get to EVOLVE

EVOLVE is a cloud-based service. All you need 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 by clicking the following address and choosing your site from the list:

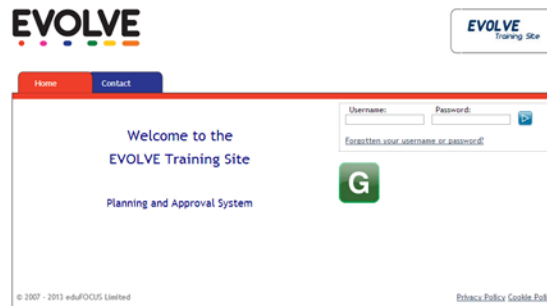
[www.evolve.online](http://www.evolve.online)

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## Section 1.2: How to set-up your EVOLVE account

You should have received your default username and password from your site administrator. If you have not received these details, please contact them directly.

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



- 2) If this is the first time 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).

- 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: How to set up SSO

If SSO has been activated on your EVOLVE, you will need to follow the instructions below to activate SSO for your account. You will only need to complete this process once.

1. Log onto your school computer
2. Log onto EVOLVE as per instructions in 1.2 (above)
3. Click My Profile (blue person icon on homepage):



- 4.
5. Click [Set Up EVOLVEsso]:

[\[Awards & Training \]](#) [\[Change Password \]](#) [\[Authorise Device\]](#)

#### EVOLVEsso

EVOLVEsso enables you to link your EVOLVE account with your organisation's computer network, so that you can be automatically logged into EVOLVE without the need to enter your EVOLVE username and password. You can still access EVOLVE by using your username and password whenever you are not connected to your organisation's network.

To set up EVOLVEsso make sure that you are **LOGGED INTO YOUR ORGANISATION'S NETWORK** (PC) and then simply click on the link below to link your EVOLVE account with your organisation's computer network. You cannot link your EVOLVE account if you are not currently logged into your organisation's network!

Set-up EVOLVEsso

Update

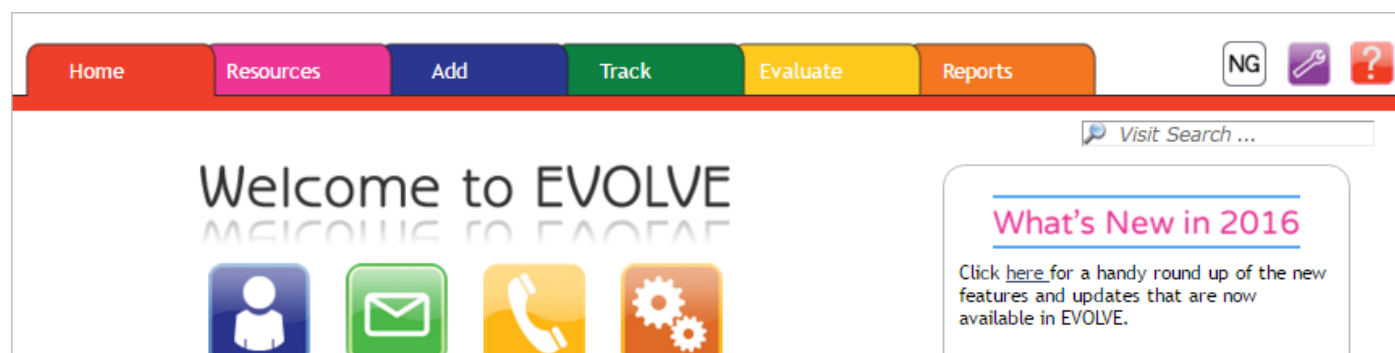
6. Click [Change Password]
7. Enter a new password, then re-enter this in Confirm New Password.
8. Click [Continue].
9. Success. SSO is set up! When using a school computer, you will no longer need to enter a username or password to access EVOLVE as it will log you in automatically.



NB: If you wish to access EVOLVE from outside of school, you will be able to log in using your username and password.

# Section 2: Using EVOLVE

## Section 2.1: The Workflow of EVOLVE

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



<b>Home</b>	Clicking this tab will take you back to the Home Page, where you can access your profile, messenger and contact details.
<b>Resources</b>	The resources tab enables you to view upcoming training sessions, access documents to help you plan a visit and view previous visits for ideas.  What do you want to do?
<b>Add</b>	Click here to add a visit, club or fixture. EVOLVE will intuitively hide any irrelevant sections based on your answers as you work through the form.
<b>Track</b>	Click here to track the progress of your forms (see 2.3 'How to track progress of visits').
<b>Evaluate</b>	Click here to evaluate forms (up to 28 days after the visit date).
<b>Report</b>	This tab enables you to easily create reports (see 2.4 'Reporting in EVOLVE').
<b>Visit Search</b>	Easily find visits and activities based on form ID or name e.g. "London Zoo" or 817. 

## Section 2.2: How to add a visit

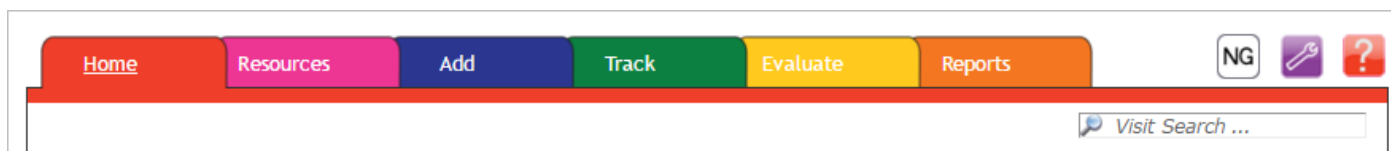
1. Log in to EVOLVE
2. Click **[Add]**



3. Complete the form
4. Once complete, click **[Submit]** to submit the form.
5. Once submitted, you can choose if you wish to send notifications to a recipient (either from the supplied list or by typing in an email address). These notifications are optional.

## Section 2.3: How to track progress of visits

1. Log in to EVOLVE
2. Click [Track]



Forms are displayed in different tabs to make it easy to track progress and find forms that need attention:

<b>Active</b>	Lists your activities running today
<b>Draft</b>	Lists all forms in your account waiting for your action/involvement. These may be visit 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 orange edit button to edit the visit form, or click on the purple 'eye' button to view a printable version of the form.
<b>Submitted</b>	Lists forms which have been submitted further up the chain, but have not yet been approved
<b>Approved</b>	Lists all <i>forthcoming</i> activities which have already been approved
<b>Evaluate</b>	Lists any activities which have run in the last 28 days and have not yet been evaluated
<b>Past</b>	Lists activities which have already run
<b>My Visits</b>	Provides a summary of activities you have either led or accompanied.
<b>Registers</b>	Lists forms awaiting register to be taken (up to 28 days after activity date).



## 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.

**Reports**

- Visits
- Staffing
- Participant
- Statistical Summary**

<a href="#">Annual Report</a>	Annual Report
<a href="#">View all</a>	View all Visit Summary reports together.
<a href="#">Statistical Summary</a>	Statistical summary of visits between specified dates
<a href="#">Visit Purpose</a>	Number of visits by visit purpose
<a href="#">Overseas Destinations</a>	Summary of visit destinations

There are four sub-categories in the 'Reports' section:

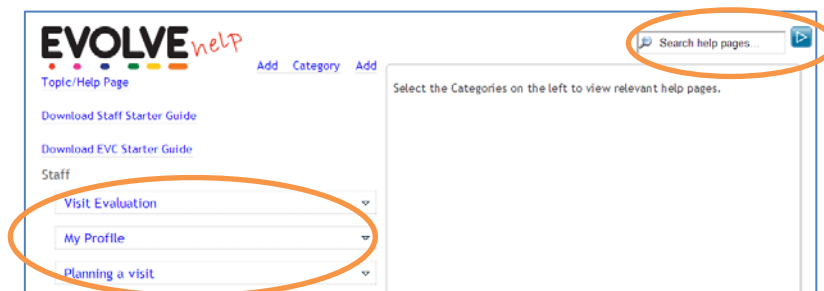
<b>Visit Monitoring</b>	These reports allow you to access the visit diary, showing draft and confirmed visits. It also allows you to generate detailed reports around specific visit criteria.
<b>Staff &amp; Volunteer Reports</b>	These reports allow you to access the visit history of staff and volunteers, and see an overview of those visits.
<b>Visit Summaries</b>	<p>These statistical reports can support visit monitoring providing aggregated data relating to types of visits, destinations, number of students involved, visit purposes etc.</p> <p>The one-click 'Annual Report' can be found in Statistical Summary tab for a complete overview of all learning opportunities for the previous academic year.</p>
<b>Participant Reports</b>	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 the answer:



If you need further information, please contact your EVOLVE administrator directly.

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