2016 Updates
An overview for LA & Collaboration System Administrators
Introduction

Dear EVOLVE User,

It’s January and therefore time to update you on what’s new in EVOLVE. On the following pages you will find details of a number of new features that are now available, as well as a round-up of some of the other recent additions to the system.

I would like to thank all of our users for their continued support, and it was great to meet so many of you at our regional workshops at the end of last year. We very much value your opinions, comments and suggestions, and in recognition of all the feedback that we have received we are once again able to bring you a collection of new features and enhancements absolutely free of charge.

Yours

Daniel Baker
Managing Director

Part 1:

EVOLVE2016 New Feature Focus

This section details the main new features that are part of the EVOLVE2016 release:

1. School Annual Report
2. Enhanced National Guidance Integrated Search
3. Additional Comment enhancements
1. School Annual Report

Annual Report is a brand new EVOLVE report which enables users, at the click of a single button, to produce a report which covers all aspects of their establishment’s outdoor learning. The Annual Report automatically defaults to the previous academic year, but can be set for alternative dates. Features include:

a) **Process Summary.** This table summarises the key staff involved in the establishment’s planning and audit process, dates of EVC training, whether an Educational Visits Policy has been uploaded, and the names of any documents uploaded to their establishment’s EVOLVE Resources:

```
<table>
<thead>
<tr>
<th>Process Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff involved in planning and audit process</td>
</tr>
<tr>
<td>Staff involved in planning and audit process</td>
</tr>
</tbody>
</table>
```

b) **Statistical Summary.** The Statistical Summary highlights key statistical information including the number of approved visits forms, the number of visits by type, the number of participant days and the number of visits by purpose. A range of useful charts are also automatically generated.
c) **Evaluations Summary.** This table highlights the intended outcomes and evaluations for each visit within the set date period. Clicking on a Visit Name will open the full visit form in a new window, for further information.

<table>
<thead>
<tr>
<th>Date</th>
<th>Visit Name</th>
<th>Intended Outcomes</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/06/2015</td>
<td>Name 2015</td>
<td>Raising confidence in French speaking</td>
<td>✔️ ✔️ ✔️</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Understanding other cultures</td>
<td>✔️ ✔️ ✔️</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Visiting historical monuments and understanding their significance</td>
<td>✔️ ✔️ ✔️</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Visiting art galleries and using these to influence their work and knowledge</td>
<td>✔️ ✔️ ✔️</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other Comments</td>
<td>Some students studied art and found these very rewarding.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Students behaved well and appreciated the different monuments and historical buildings that were visited. They were asked to use some of this information to complete in a quiz on the last evening. They saw the differences in the way that we use the metro and helped guide their group. Very good trip.</td>
<td></td>
</tr>
</tbody>
</table>

The Annual Report can be accessed by staff at schools by clicking Reports | Statistical Summary | Annual Report, and by default it reports on the previous academic year i.e. the last complete academic year. This report is particularly helpful to staff that are tasked with reviewing school LOTC provisions and/or preparing information and data for an OFSTED inspection. The reporting window can be easily changed to enable wider or narrower date ranges.

LA and Collaboration advisors/managers can also access each establishment’s Annual Report by clicking Reports | Establishments | Annual Report.
2. National Guidance Integrated Search

Since 2015, it has been possible to search OEAP National Guidance directly from within EVOLVE.

This module has now been developed further to provide users with contextual access to resources from both the OEAP National Guidance website and the EVOLVE National Library. Clicking the NG button whilst on any of the EVOLVE form pages will automatically display key guidance documents that specifically relate to the section of the form that the user is currently working on.

This search tool works on all core sections of the Visit Form e.g. Staffing, Type, Attendees etc.
3. Additional Comment Enhancements

Additional Comment was released as a part of EVOLVE\textsuperscript{2015} and enables you to incorporate additional staff into the approval process. Since it fully integrates with Custom Questions, Additional Comment provides you with a very flexible way to augment the approval and notification process based upon the specifics of a visit.

An Example Use of Additional Comment:

Approval for a particular type of visit is delegated to the Head teacher, but the DoE officer at the LA/Trust wants to be included in the approval process for all DoE related visits. Since approval is delegated to the Head, under normal circumstances the form would never reach the LA/Trust, and therefore the DoE officer could not be involved in the process. However, by creating an Additional Comment rule that only applies if DoE is selected (using the existing Custom Section Core Link feature) a request for comment can be automatically sent to the DoE officer once the EVC submits the form, but before the Head can approve it.

The following enhancements have been made to Additional Comment to allow for even greater flexibility:

3a. Choose when Additional Comment is requested

When the feature was initially released it was only possible to configure Additional Comment to be requested once Level 2 (e.g. EVC) submitted the form i.e. before it went to Level 3 (e.g. Head). You can now configure Additional Comment to be triggered at any stage of the Approval Process:
3b. Configure Additional Comment Requirements

Previously, if Additional Comment was configured then all users that received the request for comment were required to provide a comment before the form moved onto the next step in the approval chain (e.g. Head). You can now choose whether to:

- Require all commenters to provide a comment before the form progresses
- Require at least one of the commenters to provide a comment before the form progresses
- Just send a notification to a user so that the form can progress without a comment (a comment can be provided, but this is not mandatory)

![Image of a button to choose comment requirements]

3c. Hide Old Comments

In situations where Additional Comment has been configured to notify multiple users, but where only one user is required to comment, a user could find that they have a large number of forms listed in their account if they have not themselves provided a comment for the form. The new [Hide Commented Forms] button allows a user to automatically hide all forms that have already received a comment from a colleague to leave just those forms that require a comment.

![Image of buttons to show or hide previous comments]

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As well as the features listed above, we have made numerous enhancements to EVOLVE. Although these are generally smaller updates, many users will find these just as beneficial, and they are grouped by:

- Reporting Enhancements
- Data Collection Enhancements
- User Management
- Provider Management

### Reporting Enhancements

4. **Custom Report – Audit Information**

Users can now choose to display Audit Information in Custom Reports i.e. creation, submission and approval dates:

![Audit Information](image)

5. **Custom Report – Repeat Visits**

Users can now choose whether to show all occurrences of repeat visits or just one instance of each:

![Include Repeats](image)
6. Custom Report – Change of Display

In Custom Reports, the options in Step 3 have been categorised into groups for clearer display and easier selection:

- Attendees
  - Attendee Group
  - Attendees (Male)
  - Attendees (Female)
  - Attendees (Total)
  - Attendees on Register

- Staffing
  - Total number of staff
  - Total number of volunteers
  - Total number of accompanying adults

7. Custom Report – Provider Filter

In Custom Report, users can now filter the report to only return those visit forms that include the selected provider:

8. Establishment Contact Report

The Establishment Contact Report has been enhanced to:

- Include details of all multi-establishment EVCs and Heads (Level 2 & 3 users)
- Indicate where a user is an ‘Admin Support’ user
- Provide EVC and Head email addresses in a format that can be copied to an external email application (e.g. Outlook) for bulk mailing outside of EVOLVE
- Provide Establishment postal addresses for external mail-merge routines
9. Staff Awards Report

The Staff Awards Report now shows all Staff on one page, rather than over multiple pages. Clicking the table headers will now sort all staff:

![Staff Awards Report Table]

<table>
<thead>
<tr>
<th>Name</th>
<th>Establishment</th>
<th>Award Name</th>
<th>Award Date</th>
<th>Expiry Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chris Bonnington</td>
<td>E-waot</td>
<td>Sailing - Dinghy Sailer Instructor (Titall)</td>
<td>28/05/2003</td>
<td>28/05/2008</td>
</tr>
<tr>
<td>Chris Bonnington</td>
<td>E-waot</td>
<td>Canadian Level 1 Ski Instructor</td>
<td>01/01/2006</td>
<td></td>
</tr>
<tr>
<td>Chris Bonnington</td>
<td>E-waot</td>
<td>Canoeing &amp; Kayaking - Level 5 Coach (Inland)</td>
<td>23/11/1981</td>
<td></td>
</tr>
<tr>
<td>Chris Bonnington</td>
<td>E-waot</td>
<td>Hill Walking - International Mountain Leader Award (EML)</td>
<td>01/05/2006</td>
<td>01/02/2007</td>
</tr>
<tr>
<td>Chris Bonnington</td>
<td>E-waot</td>
<td>Snowboard Leader Award</td>
<td>18/02/2005</td>
<td></td>
</tr>
</tbody>
</table>
10. **Visit Notes**

Any submission/return note is now automatically background-coloured in a faint green for easier identification:

![Image of note interface]

11. **Event Specific Notes**

The Event Specific Notes module now includes the name of the user that added the ESN, as well as the date/time it was added to the visit form:

![Image of event specific notes]

12. Custom Question Type – Warning Message

Parent-Child Custom Questions have been embedded in EVOLVE for some time and many users utilise these to refine the data collection process, to ensure that questions are only asked when they are relevant, and to provide contextual guidance and feedback. Displaying a message on the screen when a user provides an ‘invalid’ response (e.g. answers “no” when you require them to answer “yes”) is an excellent way of delivering textual guidance. The new “Warning Message” custom question type displays your message in a clear red warning box.

13. Custom Questions – Re-order Questions

This new feature enables you to control the order in which Custom Sections appear on the final form. For example, if you need Visit Times to appear higher on the visit form, simply drag that section to the top!
14. **User Search**

The search bar at the top of the Users screen within the Control Panel now allows you to search for staff accounts by email address as well as name, establishment and User ID:

![User Search](image)

15. **Provider Search**

The Search tool in Resources has now been expanded to include providers listed on Kaddi, as well as individual local lists:

![Provider Search](image)

16. **LOtC Quality Badge Expiry Date**

The expiry date of any LOtC Quality Badge will now automatically be shown on the visit form next to the provider’s details:

![LOtC Quality Badge Expiry Date](image)