



## **eDofE Management Toolkit**

A guide to effective eDofE management for Operating Authorities



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# Introduction

To support you with managing and administering DofE programmes, we have produced the eDofE Management Toolkit for Operating Authorities – providing instructions for the eDofE functions that you will need to carry out to successfully operate the DofE within your Licensed Organisation (LO).

Please note that this document also includes instructions required of other adults involved in the delivery of DofE programmes within your LO and can therefore be used as a point of reference for training Co-ordinators and Leaders in your centres.

## Section one: Managing your infrastructure on eDofE

### Useful tips

The longer an organisation has been delivering the DofE, the more groups it may have on eDofE.

Encourage centres to keep the number of groups to a minimum by deleting old groups. In addition, ensure existing groups only include participants who are *actively* taking part in a DofE programme.

We recommend you ask centres to:

- Review old groups and archive any participants no longer doing their DofE programme. N.B. This does not delete the account; accounts can be unarchived at any point in the future (see '**Archiving a participant**' on page 26).
- Send a group email before archiving participants, requesting they make contact if they would like to continue with their programme (see '**User information reports**', which include email addresses, on page 39). This may particularly help centres with low achievement rates.
- Delete old groups once participants have been archived and there are no longer any participants left in the group (see '**Editing or deleting a group**' on page 9).
- Create a 'Past participants' group if appropriate, where participants can be moved to if they are still doing their programme but have left the organisation and will continue to be supported.
- Archive participants as they drop out, ensuring that the '**Participant Overview**' is an accurate reflection of active participants (see '**Archiving a participant**' on page 26).
- Perform the above 'tidy-up' actions each year before a new cohort is enrolled.

For centres which are no longer delivering the DofE, please change the centre name on eDofE to 'zzzCentreName' and inform your DofE Operations Officer or the South West Regional Office.

## Creating a centre

Once a new centre has been set up under your LO's name and the appropriate service level agreement is in place, you can then create them as a delivering centre on eDofE.

To create a centre, click on **'Manage infrastructure'** then click the **'Add new centre'** button.

The screenshot shows the eDofE interface. On the left is a sidebar menu with icons and labels: DofE Information, Participation Places, Award approvals, Manage participants, Manage adults, **Manage infrastructure** (circled in red), News, Resources, Keep Safe, and Reports. The main area is titled 'Centres in Katie Cox - Test LO' and has a 'LO information' button. Below this is a table with columns: Centre name, Contact, Email, Groups, Participants, and Manage. The table contains one row for 'SW Test Centre' with a link icon in the Manage column, and a 'Total' row showing 3 groups and 6 participants. At the bottom right, the 'Add new centre' button is circled in red.

Centre name	Contact	Email	Groups	Participants	Manage
<a href="#">SW Test Centre</a>		<a href="#">katie.cox...</a>	3	6	
		<b>Total:</b>	<b>3</b>	<b>6</b>	

The next page will allow you to create a new centre. Complete the details for the new centre; enter the centre name e.g. Corston Academy and the postcode. The **'Find address'** button will populate the remainder of the address. N.B. A space must be included in the postcode.

\* Name:

\* Centre type:  ?

\* This centre works exclusively with disadvantaged young people:  
☐ Yes ☒ No ?

Enter house no / name and postcode and click 'Find address'.

\* House no/name:

\* Postcode:  **Find address**

\* Street name:

Address line 2:

Address line 3:

\* Town:

County:

\* Country:

Enter the details for the main contact at the centre and click **'Save'**.

\* Email:



Contact Name:

Contact Number:

**Save**

## Editing a centre

To edit a centre, click on **'Manage infrastructure'**. This will show you a list of all of the centres within your LO. Click on the grey pencil to the right of the centre you wish to edit.

Centre name	Contact	Email	Groups	Participants	Manage
<a href="#">Corston Academy</a>	Tess Collins	<a href="#">tcollins@...</a>	0	0	
<a href="#">SW Test Centre</a>		<a href="#">katie.cox...</a>	3	6	
Total:			3	6	

Select the **'Details'** tab and edit the centre details as necessary, clicking **'Save'** when finished.

Details

Groups

\* Name:

Corston Academy

\* Centre type:

Academy School

?

\* This centre works exclusively with disadvantaged young people:

☐ Yes

☒ No

?

Enter house no / name and postcode and click 'Find address'.

\* House no/name:

Corston Academy

\* Postcode:

BA5 5AP

Find address

\* Street name:

School Lane

Address line 2:

Address line 3:

\* Town:

Corston

County:

\* Country:

United Kingdom

The following details will be available to all adults and participants in the centre, as well as your Licensed Organisation and DoFE Office.

\* Email:

tcollins@corston.sch.uk

Contact Name:

Tess Collins

Contact Number:

01225 788365


Save

## Creating a group within a centre

When first creating a group, think about a group structure that will be clear to all Leaders and will also work for future groups. A good example is to name a group after the level and the academic year, e.g. Bronze 2017-18.

To create a group, click on **'Manage infrastructure'** and then click the grey pencil on the right-hand side underneath **'Manage'**.

The screenshot shows a sidebar menu on the left with the following items: DofE Information, Participation Places, Award approvals, Manage participants, Manage adults, **Manage infrastructure** (circled in red), News, Resources, Keep Safe, and Reports. The main content area is titled 'Centres in SW Hannah' and features a table with the following data:

Centre name	Contact	Email	Groups	Participants	Manage
SW Hannah		Hannah.Tr...	4	7	
Total:			4	7	

Buttons for 'LO information' and 'Add new centre' are located at the top right and bottom right of the table respectively.

The next page will allow you to create a new group as well as edit current groups. Click on the **'Add new group'** button in the bottom right-hand corner. A pop up will appear where you will need to enter the group name and choose a Primary Leader for the group. The Primary Leader is the individual who will receive the alerts for young people within that group. Click **'Save'**.




The screenshot shows a 'Groups' page with a table listing groups. A 'Details' tab is active, and a 'Groups' tab is also visible. A 'Details' section on the left contains the text: 'Click the 'Ma...', 'Click the nu...', 'Group name', 'Bronze 2016', 'Bronze 2017', 'Silver 2015', and 'Total:'. The table has columns for 'Group name', 'Contact', 'Groups', 'Participants', and 'Manage'. The 'Add Group' pop-up is displayed in the center, with the following fields: 'Name: Bronze 2017-18' and 'Primary Leader: Hannah Trent'. The 'Save' button in the pop-up is circled in red. Below the table, there is a 'Save' button and a 'Create leader' link. The 'Add new group' button at the bottom right is also circled in red.

**Add Group**

\* Name:

\* Primary Leader:

If you are creating a new group with a new Leader use the 'Create leader' link below.

Group name	Contact	Groups	Participants	Manage
Bronze 2016				
Bronze 2017	Hannah Trent	1	2	
Silver 2015	Rosemary Tyrell	1	0	
Total:		3	7	





If you are creating a new group with a new Leader use the 'Create leader' link and create the Leader first. The option to create a group is included in this process.

[Create leader](#)



## Editing or deleting a group

To edit a group, click on **'Manage infrastructure'** and then the grey pencil on the right-hand side (as shown in the creating a group section). This will show you a list of all of the groups within the centre. To edit a group, you need to click on the grey pencil to the right of the group you wish to edit.

Details Groups				
Click the 'Manage' icon to view and manage groups and Leaders.				
Click the number of participants to go to the Participant Overview screen.				
Group name	Primary Leader	Leaders	Participants	Manage
Bronze 2015-16	Hannah Trent	1	2	
Bronze 2016	H T	1	5	
Bronze 2017-18	Hannah Trent	1	0	
Silver 2015	Rosemary Tyrell	1	0	
Total:		4	7	

### Bronze 2015-16

Back

Details

Members

History



\* Name:

Save

Current Leaders

These are adults assigned to **Bronze 2015-16**

To change primary Leader select new Leader and click 'Save'. To remove Leader tick the box and select 'Save'. A primary Leader cannot be removed unless a new one is selected.

ID	First name	Last name	Role	Account Status	Primary Leader	Remove
 1554475	Hannah	Trent	Manager	Active	<input checked="" type="radio"/>	<input type="checkbox"/>
 1554508	Rosemary	Tyrell	Leader	New	<input type="radio"/>	<input type="checkbox"/>

Save

Add new Leader to group

(Please select)

Add

Delete Group

Only groups without participants can be deleted. Move or archive participants in 'Participant Overview' under 'Manage participants'.

Delete

To edit the name of a group, enter the new name and then click **'Save'**.

You can remove a Leader by clicking the box under **'Remove'** and then clicking **'Save'**. However, you cannot delete a Primary Leader, so you'll need to change the Primary Leader first.

You can change the Primary Leader by selecting someone different then clicking **'Save'**.

You can add a Leader to the group by selecting their name from the drop down list and then clicking **'Add'**.

In order to delete a group it must not contain participants. You can then delete the group by clicking **'Delete'**.

You can also see the members within the group by clicking on the **'Members'** tab at the top of the page, or the history of any changes to the group by clicking on the **'History'** tab.

# Section two: Adults

## Useful tips

Any Leader within a group will appear in the dropdown list when a participant submits their Programme Planner or evidence for approval.

The fewer Leaders on this list, the less confusion for participants and the easier it is for Co-ordinators to identify who is receiving the alerts for a group.

We would recommend you ask centres to:

- Keep the number of Leaders within a group to a minimum, for the reason above (see '**Editing or deleting a group**' on page 9 for instructions on adding or removing Leaders from a group).
- Archive any adults that are no longer with the organisation or no longer involved in DofE delivery at the centre (see '**Archiving an adult**' on page 14 for instructions on archiving an adult).
- Review the above as necessary and at least once a year before a new cohort is enrolled.

## Adult roles

Each role has different access rights within eDofE. Brief descriptions of the roles are included below, but if you wish to view a detailed breakdown of permissions please see Appendix 1.

### Helper

This is the most basic adult account within eDofE and has very limited functionality, but it is a useful method to track volunteers within centres that do not require full eDofE access. Helpers are not able to interact with and/or view programmes that participants are undertaking in eDofE, however they can access Resources and eDofE Mapping.

### Leader

A Leader is an adult responsible for a DofE group. Leaders are able to interact with participants on eDofE that have been allocated to their specific group(s) only.

### Co-ordinator

A Co-ordinator is the adult who sets up and manages the DofE in a centre. This person will support Leaders and oversees all groups within a centre. The DofE Co-ordinator is able to see and interact with all participants, groups and DofE staff within the centre.

### Administrator

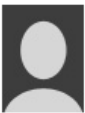
An Administrator is able to interact with eDofE at group, centre and LO level.

### Manager


The DofE Manager is the named person appointed by the Licensed Organisation who takes responsibility for the day-to-day delivery of the DofE. The DofE Manager is able to see and interact with all participants, groups and DofE staff within the LO. This role can only be changed by Regional Office.


## Creating an adult


To create an adult, click on **'Manage adults'** on the left hand side, followed by **'Create new adult'**. Complete all of the fields marked with a red \*.





Hannah Trent  
ID No: 1554475  
[View/edit my profile](#)


 DofE Information


 Participation Places


 Award approvals


 Manage participants


 Manage adults

 Adult overview

 **Create new adult**

 Move adults

 Manage infrastructure

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### Create adult

Complete this short form to create an adult account.

\* = Required field.

1. Role

\* Role:

2. Where

\* Region:

\* Licensed Organisation:

Click on the **'Create adult'** button at the bottom of the page.

### 6. Create Adult

Click Create adult to finish creating the account. You will then be able to set the permissions if applicable to the role.

Next, a pop-up box will ask you to confirm that you wish to create an adult. You will then be taken to a page where you can set permissions. Choose the permissions you would like the adult to have and then click **'Confirm'** at the bottom of the page. For further information on permissions please see Appendix 1.

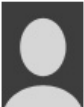
Type	Permission	Allow	Deny
Manage participants	Can create a new Silver participant	<input type="radio"/>	<input checked="" type="radio"/>
Manage participants	Can create a new Gold participant	<input type="radio"/>	<input checked="" type="radio"/>
Manage participants	Can add a Silver Award to a participant	<input type="radio"/>	<input checked="" type="radio"/>
Manage participants	Can add a Gold Award to a participant	<input type="radio"/>	<input checked="" type="radio"/>
Manage participants	Can adjust participant's enrolment and section dates	<input type="radio"/>	<input checked="" type="radio"/>
Manage participants	Can abandon an Award level	<input type="radio"/>	<input checked="" type="radio"/>

Version SW 4 Updated 20/10/17


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## Changing permissions


To change the permissions on an adult account, click on **'Manage adults'** on the left-hand side. Type in the name or eDofE number and click **'Search'**. Any results will be shown below. Click on the eDofE number to access the appropriate account.





Hannah Trent  
ID No: 1554475  
[View/edit my profile](#)


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### Manage adults

**What can you do in this section?**

Here you can create adult accounts, edit profiles and reinstate archived adults.

**Search adult**

Search for an adult using any of the fields below.

eDofE ID number:


eDofE username:

First name:

Last name:

Search

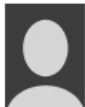
Results: 1

ID	First name	Last name	Location	Group	Role	Status
 <b>1578964</b>	John	Smith	Training SW Hannah Example School	Bronze 2015-16	Leader	New

Next, you'll need to click on the **'Change permissions'** button on the right-hand side.

**Adult profile: John Smith**

**Communications**



Name:

John Smith

ID number:

1578964

eDofE role:

**Leader**

Centre:

Example School

Licensed Organisation:

SW Hannah

Region:

Training

Last sign in:

Status:


New


Send message


**Change Permissions**


Archive user


Click on the title below to view and edit this user's details.

 [Account details \(show\)](#)

 [Contact details \(show\)](#)

 [Personal details \(show\)](#)

 [Training \(show\)](#)

 [History \(show\)](#)

You will then be able to change permissions by selecting the **'Allow'** or **'Deny'** button to the right-hand side of each one.

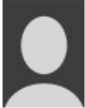
## Shortcuts

Each adult can edit the six shortcut buttons on their homepage.


### Shortcuts


Participant overview	Adult overview	Manage alerts
Subgroups	Resources	Participation Places


Click on **'My settings'** on the left-hand side and then choose which option you would like for each shortcut button, then click **'Save settings'** at the bottom of the page.





Hannah Trent  
ID No: 1554475  
[View/edit my profile](#)


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### Settings

#### Homepage

You can customise your home page by changing the position of the news to either the top or the bottom

News at top ☐

Shortcut1: 

Participant overview

Shortcut2: 

Adult overview

Shortcut3: 

Manage alerts

Shortcut4: 

Subgroups

Shortcut5: 

Resources

Shortcut6: 

Participation Places

---

#### Grids

You can remove the profile pictures from all the grids in eDofE by unchecking the box below

Include profile picture ☒

---

#### Alerts for evidence


Tick this box if you no longer want eDofE to send you an alert when a participant submits evidence for approval. If you do this you will no longer receive any of these Alerts but you will still receive alerts when a participant submits a programme plan or section approval request to you. You can see which participants have evidence requiring approval and manage these through the Participant overview screen in Manage participants. You can turn these alerts back on at any time by un-ticking the box and saving your settings.

Disable evidence alerts ☐


**Save settings**


## Archiving an adult


To archive an adult account, click on **'Manage adults'** on the left-hand side. Type in the name or eDofE number and click **'Search'**. Any results will be shown below. Click on the eDofE number to access the appropriate account.





Hannah Trent  
ID No: 1554475  
[View/edit my profile](#)


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### Manage adults

**What can you do in this section?**

Here you can create adult accounts, edit profiles and reinstate archived adults.

**Search adult**

Search for an adult using any of the fields below.


eDofE ID number:

eDofE username:

First name:

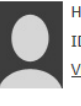
Last name:

Results: 1

ID	First name	Last name	Location	Group	Role	Status
 <b>1578964</b>	John	Smith	Training SW Hannah Example School	Bronze 2015-16	Leader	New


Next, click on the **'Archive user'** button on the right hand side.


N.B. **'Archive user'** will be greyed out if the adult is a Primary Leader. The Primary Leader role will need to be reallocated to another adult first (via the relevant groups under **'Manage infrastructure'**), before archiving the user.




Hannah Trent  
ID No: 1554475  
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### Adult profile: John Smith




Name: John Smith  
ID number: 1578964  
eDofE role: **Leader**  
Centre: Example School  
Licensed Organisation: SW Hannah  
Region: Training  
Last sign in:  
Status: New


Click on the title below to view and edit this user's details.


 Account details (show)

 Contact details (show)

 Personal details (show)


 Training (show)

 History (show)


 Sign in History (show)


## Unarchiving an adult


To bring an adult out of the archive, click on **'Manage adults'** then **'Adult overview'** on the left-hand side. In the group box select **'All'** and in the status box select **'Archived'**, then click on the **'Search'** button. A list of archived adult accounts will be displayed. Click in the box to the right of any account you wish to unarchive, and then click on the **'Unarchive user'** button.





Hannah Trent  
ID No: 1554475  
[View/edit my profile](#)


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Adult overview

Communications

Location

Region: Training

LO: SW Hannah

Centre: SW Hannah

Group: (All)

Status: Archived

Search

Note: Columns below whose headings are underlined are sortable. Click on an ID number to view an adult's profile.

Results: 3

ID	<u>First name</u>	<u>Last name</u>	<u>Role</u>	<u>Location</u>	<u>Username</u>	<u>Date Archived</u>	Select all
1577465	g	g	Co-ordinator	Training, SW Hannah, SW Hannah	GG	16/08/2017 16:06:48	<input type="checkbox"/>
1578964	John	Smith	Leader	Training, SW Hannah, SW Hannah	JOHNSMITH63	16/08/2017 16:05:42	<input checked="" type="checkbox"/>
1578967	Sarah	Smith	Helper	Training, SW Hannah, SW Hannah	SARAHSMITH37	16/08/2017 16:06:51	<input type="checkbox"/>

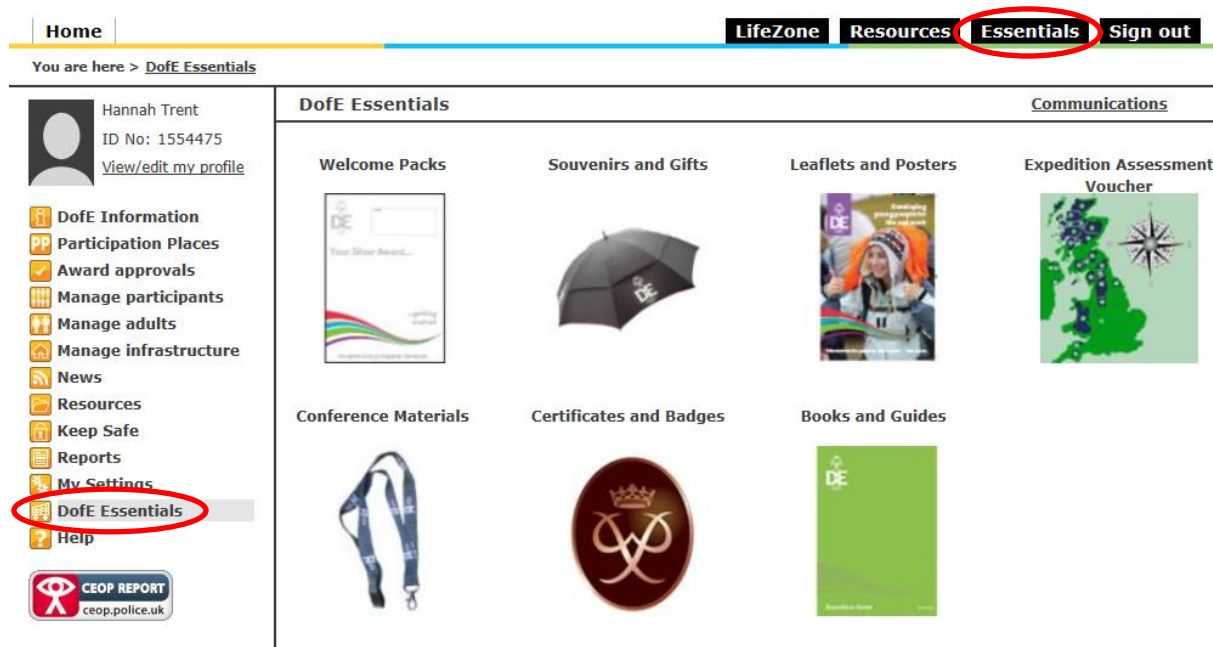
Results: 3

Unarchive user

# Section three: Participation places, certificates and badges

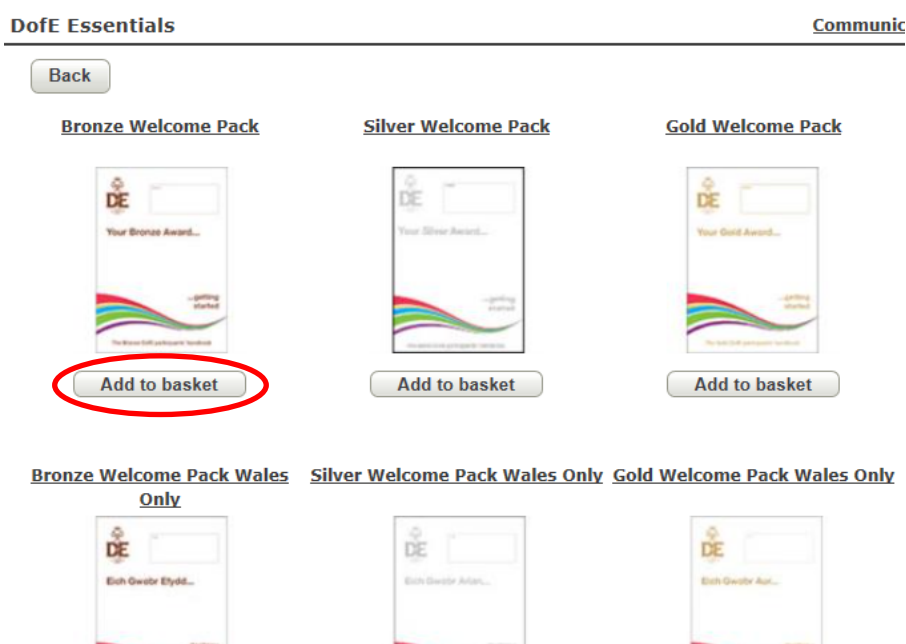
## Purchasing participation places, certificates and badges

Click on '**DofE Essentials**' on the left menu or on '**Essentials**' on the top menu. Next, click on the category you would like to order (e.g. *Welcome Packs*).



You can click on the item itself to find out more information or click '**Add to basket**' if you wish to order it. You can add as many different items as you like to your basket and use the '**Back**' button to add items from different categories.











**Top tip:** Order your certificates and badges at the same time as your *Welcome Packs* so you only pay one postage fee.





You can change the quantity of the items at the bottom of the page by clicking on the plus or minus symbols or free typing in the box. You can also remove items by clicking on the red cross. Once you are happy with your order, click **'Next'**.

#### Basket

Item	Quantity	Cost
 Bronze Welcome Pack	 3 	£60.00
 Bronze DofE Certificate	 3 	£0.00
 Bronze Award Level Badge	 3 	£0.00
Order total:		£60.00
 P&P:		£7.50
<b>Total to pay(3 items):</b>		<b>£67.50</b>

[Download credit account form](#)

**Next**

On the next page, you can specify where you would like to allocate the participation places to within the LO. If you wish the places to be available at the LO, leave the page as you find it and simply click **'Next'** (you can allocate them to a centre later). If you would like to allocate the places to one of your centres now, please select the centre from the drop-down list and then click **'Next'**.

Please see pages 19-20 for instructions on how to allocate and recall participation places to and from your centres.

#### DofE Essentials

#### Communications

You can use the drop down tool to specify where you would like to allocate the Participation Places which will be made available as soon as you complete your Welcome Packs order.

Please note that your Welcome Packs will be sent to your delivery address. You will be able to view and edit your delivery address after clicking Next.

\* Region:

LO:

Centre:

Group:

**Back**

**Next**


On the following page select the appropriate delivery address and click **'Next'**. You will then have the opportunity to review your order, add a purchase-order number and finally complete your order.


Please make a note of the order reference number; it will appear in a green bar once the order has gone through. The participation places will be credited immediately and the *Welcome Packs* will be delivered within three to five working days.


## Viewing participation places


To view your participation places, click on **'Participation places'** in the menu on the left. The amount of places you have at LO level will show in the Bronze, Silver and Gold boxes at the bottom. If you think the number is incorrect, then please contact the Regional Office.


To check the number of places for a particular centre or group, select the appropriate options in the centre or group dropdown boxes.


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**Allocate**  
You can allocate Participation Places from a higher to a lower hierarchy level depending on your permissions.

**Recall**  
You can recall Participation Places from a lower to a higher hierarchy level depending on your permissions.

**Statement**  
You can view the history of all transactions since 31st July 2015.

**Current balance**  
Below you can check your current balance. The balance for the lowest chosen level will be displayed.

\* Region: Training

Licensed Organisation: SW Hannah

Centre: (Please select)


Group: (Please select)


0 Bronze


1 Silver


1 Gold


You can view a statement showing when participation places were purchased and used by clicking on **'Statement'**, where necessary selecting the centre, then selecting the appropriate date range and clicking on the **'Get Statement'** button.


 Hannah Trent  
ID No: 1554475  
[View/edit my profile](#)


 DofE Information


 **Participation Places**


 Allocate


 Recall


 **Statement**


 Award approvals


 Manage participants


 Manage adults


 Manage infrastructure


 News


 Resources


 Keep Safe

 Reports

 My Settings

 DofE Essentials

 Help



**Participation Places Statement**  
You can view the history of all transactions. Please note that this is for transactions since 31st July 2015 only.  
Choose from the filters below to create the statement you wish to view. ?

**Location**  
Region: Training  
LO: SW Hannah  
Centre: (Use LO)  
Group: (Please select)

**Levels**  
☐ Bronze  
☐ Silver  
☒ Gold  
☐ All

\* Start date : 02/04/2017

\* End date : 17/08/2017

Transaction Type  
(All)

Get statement

Type	Transaction Date	Type	Transaction Number	To/From	Transacted By	Level	PP's In	PP's Out	Balance
<input checked="" type="checkbox"/>	30/05/2017 12:33:29	Used	US329801882DCM	Bob Smith (1554498)	Hannah Trent	B	0	1	5
<input checked="" type="checkbox"/>	30/05/2017 12:34:39	Used	US417050574SCA	Sharron Hurst (1554499)	Hannah Trent	B	0	1	4
<input checked="" type="checkbox"/>	30/05/2017 12:35:29	Used	US859565532BNH	Kirsty West (1554500)	Hannah Trent	B	0	1	3

Version SW 4 Updated 20/10/17

18

## Allocating participation places

To allocate your participation places to a centre, click on **'Allocate'** and press **'Select'** to allocate places from LO level.

Katie Cox  
ID No: 1449219  
[View/edit my profile](#)

**Allocate Participation Places**

You can allocate Participation Places from a Region, Licensed Organisation or centre dependent upon your permissions.

**Step 1 - From ?**

Select the location to allocate Participation Places FROM.

\* Region: Training

Licensed Organisation: Katie Cox - Test LO

Centre: (Use LO)

Select

Next, select the centre from the dropdown list that you wish to allocate the places to and press **'Select'**.

**Allocate Participation Places** [Communications](#)

You can allocate Participation Places from a Region, Licensed Organisation or centre dependent upon your permissions.

**Step 1 - From ?**

Select the location to allocate Participation Places FROM.

\* Region: Training

Licensed Organisation: Katie Cox - Test LO

**Step 2 - To ?**

Select the location to allocate Participation Places TO.

Centre: Corston Academy

Group: (Use Centre)

Start again

Select

Enter the number of places for each level that you wish to move to the centre in the **'Amount to allocate'** boxes (or use the plus or minus symbols to change the number of places) and press **'Allocate'**.

**Step 3 - Places**

Select how many Participation Places need to be allocated.

From LO: Katie Cox - Test LO

46 Bronze 47 Silver 48 Gold

Amount to allocate:

10 10 0

To Centre: Corston Academy

0 Bronze 0 Silver 0 Gold

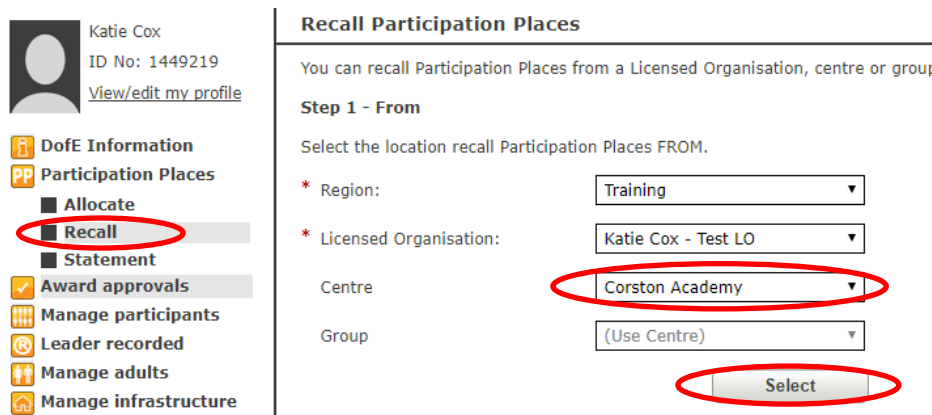
Start again

Allocate

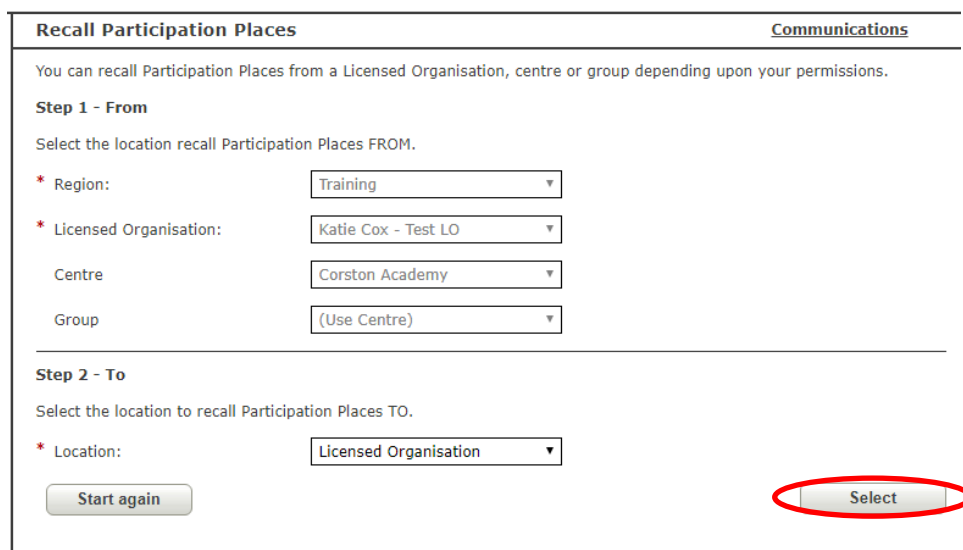
A green banner will be displayed at the top of the page to confirm the participation places have been successfully allocated. The places will be allocated to the centre immediately, allowing participant accounts to be created instantly. Please ensure that you distribute the appropriate *Welcome Packs* to the centre accordingly.

## Recalling participation places

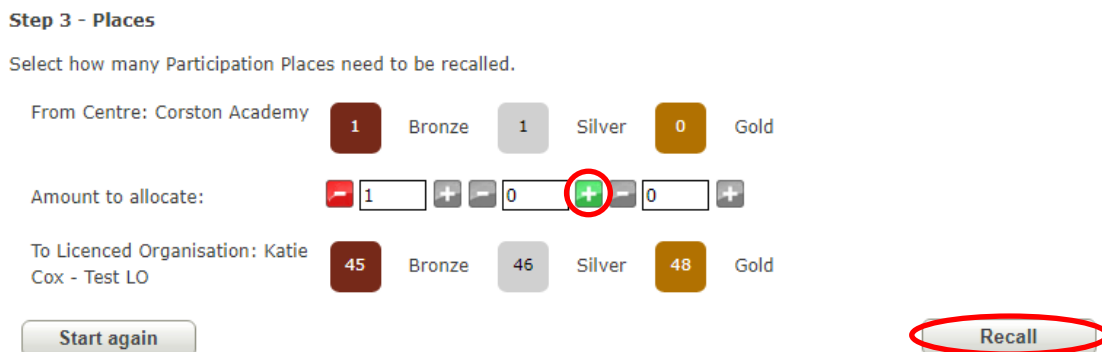
To recall participation places from a centre, click on **'Recall'**, select the appropriate centre from the dropdown list and press **'Select'**.



To recall the places back to LO level, simply press **'Select'** on the next step.



Indicate the number of places you wish to recall for each level by clicking on the plus or minus symbols or free typing in the box. The green plus button will change to grey when there are no further places available to be recalled. Once you have the correct number of places in the boxes, click **'Recall'**.



A green banner will be displayed at the top of the page to confirm the participation places have been successfully recalled. The places will be available at LO level immediately. Please ensure that you reclaim the appropriate Welcome Packs from the centre where necessary.

# Section four: Creating and managing participants

## Creating a participant

**Top tip:** You can delete a participant within 14 days of creating them if they haven't logged into their account.

N.B. Creating participants may be a task that Co-ordinators complete at centre level. If so, ensure they have the appropriate permissions and the participation places are available at centre level.

To create a new participant who doesn't already have an eDofE account, click on **'Manage participants'** and then **'Create participant'**. Complete all of the fields with a **red \***, including selecting the appropriate group for the participant. Select which level you are creating by clicking on the Bronze, Silver or Gold square. The number inside the square is the amount of participation places you currently have.

**Create Participant**

Complete this short form to create a Participant Account.

\* = required field

**1. Where**

\* Region: Training

\* Licensed Organisation: SW Hannah

\* Centre: SW Hannah

\* Group: (Please select)

**2. Level**

Choose where you would like to take the Participation Place allocation from. The figures show the number of places available. Click on a level to start creating a participant.

\* Allocate from: Licensed Organisation

\* Level: 0 Bronze 1 Silver 1 Gold

\* Direct entrant? ☒ Yes ☐ No ?

**3. Who?**

Participants will update their profile with more information when they sign in.

\* First name:

Enter the participant details in the **'Who?'** section. The username will be generated automatically. If an email address is entered, the login details will be sent to the participant.

**Top tip:** Leave the email address blank and then once all of the new participants have been created, click on the **'Download to spreadsheet'** button at the bottom of the screen. This will create a spreadsheet with the usernames and passwords (their date of birth in the format ddmmyyyy). We recommend Leaders organise an eDofE session in a computer room and ask all of the students to log in at the same time to complete their Programme Planners. That way they won't have to worry about any forgotten passwords or usernames.

Once the appropriate fields have been completed, click on the **'Create participant'** button. A pop up will appear asking **'Are you sure you want to create this participant?'** and then click **'Yes'**.

Cancel without allocating Create participant

The **'History'** section at the bottom of the page will list all of the accounts created within the last week.


## Deleting a participant

A participant can only be deleted within 14 days of the account being created and if the participant hasn't logged in to their account.

To delete a participant, click on '**Manage participants**' and then '**Participant overview**'. Click on the eDofE number of the account you wish to delete and click the '**Delete user**' button on the right. The participation place will be reallocated to the level at which the account was originally created from.

**Participant profile: Katie River**

[Communications](#)



Name: *Katie River*

ID number: *1579616*

Group: *Silver 2015* [Change](#)

Centre: *SW Hannah*

Licensed Organisation: *SW Hannah*

Region: *Training*

Leaders: *Rosemary Tyrell*

Last sign in:


Status: *New*

[Send message](#)

[Add level](#)

[Archive user](#)

[Delete user](#)

**Awards** 

Award level	Enrolment date	Earliest completion date	Volunteering	Physical	Skills	Expedition	Residential	
<a href="#">Silver</a>	12/07/2017	22/08/2018					n/a	

If the '**Delete user**' button is semi-transparent, then either too much time has elapsed or the user has logged into their account, meaning it is no longer possible to delete the account.

## Adding a level to a participant (Silver or Gold Award)

If a participant already has an eDofE account, then a level can be added rather than creating a new account. Click on **'Manage participants'** and **'Add next level'**. Choose a group and click **'Search'** to bring up a list of participants. Select the enrolment date and then tick the box to the right of the participant under the level you wish to add. Click **'Add level'**.

Hannah Trent  
ID No: 1554475  
[View/edit my profile](#)

- DofE Information
- Participation Places
- Award approvals
- Manage participants**
- Participant overview
- Create participant
- Add next level**
- Manage alerts
- Directly approve
- Assessor's Reports
- Add evidence
- Expedition set up
- Move participants
- Subgroups
- Manage adults
- Manage infrastructure
- News
- Resources
- Keep Safe
- Reports
- My Settings
- DofE Essentials
- Help

### Add next level

[Communications](#)

Here you can add a new level to participants - providing you have enough Participation Places available.

Search for a list of participants in the group. You can tick those who are eligible to progress to a higher level. They have the correct minimum age and previous achievement. Where the tick box is greyed out, hover over text indicates why that level cannot be added.

You can change a participant to a different group if you are a Leader for that group.

If the group you are looking for is not in the drop down list, please contact your manager.

Region: Training  
LO: SW Hannah  
Centre: SW Hannah  
Group: Bronze 2016  
Status: (Current)

Enrolment date  
\* Date: 18/08/2017

**Search**

Results: 5

ID	First name	Last name	Date of birth	Group	Level	Silver	Gold
1554498	Bob	Smith	12/10/2002	Bronze 2016	B	<input type="checkbox"/>	<input type="checkbox"/>
1554499	Sharron	Hurst	18/05/2001	Bronze 2016	B	<input type="checkbox"/>	<input checked="" type="checkbox"/> (Direct)
1554500	Kirsty	West	23/10/1999	Bronze 2016	B	<input type="checkbox"/>	<input type="checkbox"/> (Direct)
1555170	Mary	Smith	09/06/1999	Bronze 2016	B	<input type="checkbox"/>	<input type="checkbox"/> (Direct)
1577442	Sandra	Smith	15/04/2002	Bronze 2016	S	<input type="checkbox"/>	<input type="checkbox"/>

Results: 5

**Add level**

A pop-up box will allow you to choose a new group to move the participant into (the group needs to be created beforehand – see page 8). Click **'Next'**. You will then need to select which level you are adding (the number showing is the amount of participation places you have at that level) and click **'Add level'**.

#### Add Levels

Select the group.

LO: SW Hannah

Centre: SW Hannah

Group: Gold 2017-18

**Next**

#### Add Levels

Please choose where you would like the participation places to be taken from.

From: Licensed Organisation

0 Bronze 1 Silver 1 Gold

**Add level**

You can delete a level by selecting the participant in **'Participant overview'**, then clicking on the level (e.g. Gold) and then clicking on the **'Delete level'** button on the right. You only have 14 days from the date of adding the level to do this.



## Changing a participant enrolment/start date

Find the participant you wish to change the enrolment date for by either using the **'Manage participant'** and **'Participant overview'** buttons, or by using the **'Find user'** search bar in the top right hand corner.

Find user

Click on the Award level that you wish to change the date for, e.g. Silver.

**Resources** **Essentials** **Sign out**

### Awards



Award level	Enrolment date	Earliest completion date	Volunteering	Physical	Skills	Expedition	Residential
<b>Silver</b>	01/07/2017	01/08/2018	 01/08/2017			 View	n/a

Click on **'Change dates'** on the right-hand side.

**View Participant : Sandra Smith's Silver Award**

**Communications**

Level: *Silver*  
Name: *Sandra Smith*  
ID number: *1577442*  
Group: *Bronze 2016*  
Centre: *SW Hannah*

Send message

Abandon level

**Change dates**

You can enter the new date in the **'Enrolment date'** box and click **'Save'** in the bottom-right corner. You can change the timescales by selecting a different option or change the date a section was started by changing the date in the box next to the section you wish to change.

N.B. Timescales cannot be changed if one or more sections have been completed; in order to change the timescales, the relevant sections will need to be reopened and then be reapproved if appropriate.

**Change dates Silver Award**
**Communications**

Name: *Sandra Smith*  
ID number: *1577442*  
Date of birth:   
Direct entrant: ☒ Yes ☐ No  
Please select new timescales:  
☒ Vol: 12 Months, Phy: 6 Months, Ski: 3 Months  
☐ Vol: 12 Months, Phy: 3 Months, Ski: 6 Months  
☐ Vol: 6 Months, Phy: 3 Months, Ski: 12 Months  
☐ Vol: 6 Months, Phy: 12 Months, Ski: 3 Months  
Enrolment date:

Back

Section	Start	Timescale	Earliest completion	Completed
Volunteering	<input type="text" value="01/08/2017"/>	12 months	01/08/2018	
Physical		6 months		
Skills		3 months		

Reset

**Save**

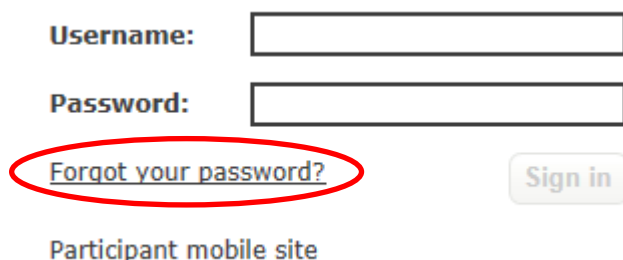


## Forgotten/resetting passwords

You can share a YouTube video on resetting a password with this link:

<https://www.youtube.com/watch?v=JY4ipyjs7Y8>. Alternatively, follow the instructions below.

If an eDofE user has forgotten their password, they should click on the **'Forgot your password?'** button on the sign-in page.



Username:

Password:

[Forgot your password?](#)

[Participant mobile site](#)

Enter the username and click **'Submit'**. They will then be asked a security question, which would have been set up when activating their account. Provided they answer this correctly, they will be able to enter a new password and click **'Save'**. They cannot use a previous eDofE password.

### New password

Keep your password safe and don't share it.

Choose something memorable. Your password will have to meet the four security requirements below, so check your Caps Lock key.



\* New password:

\* Confirm password:

**A**  
Uppercase

**a**  
Lowercase

**1**  
Number

**6+**  
6 or more  
characters

[Return to Sign in page](#)

If they can't remember the answer to their security question, click on the **'Can't remember?'** button and they will be able to have a temporary password sent to their registered email address.

Please answer the security question.

Username: SharronHurst

Security question: My first pet's name?

Security response:

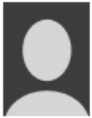
[Can't remember?](#)

[Return to Sign in page](#)

## Archiving a participant

### If you wish to archive one participant:

Find the participant you wish to archive by either using the **'Manage participant'** and **'Participant overview'** buttons, or by using the **'Find user'** search bar in the top right-hand corner. Click on the **'Archive user'** button on the right-hand side.

Participant profile: Sandra Smith		Communications
	Name: Sandra Smith	<a href="#">Send message</a>
ID number: 1577442		<a href="#">Add level</a>
Group: Bronze 2016	<a href="#">Change</a>	<a href="#">Archive user</a>
Centre: SW Hannah		
Licensed Organisation: SW Hannah		
Region: Training		
Leaders: H T		
Last sign in: 10/08/2017		
Status: Active		

### If you wish to archive multiple participants:

Click **'Manage participants'** then **'Participant overview'** and select the appropriate group, then click **'Search'**. Select the participants you wish to archive by clicking the box to the right of their name or by clicking **'Select all'**. Click **'Archive users'** at the bottom of the page. A pop-up box will appear and click on **'Archive'**.

**Top tip:** Run a 'Directly Approve' report before archiving to check that any sections that can be approved have been. Also, clear any alerts on the accounts.

Location		Subgroups	Levels
Region: Training		(Please select)	<input type="checkbox"/> Bronze
LO: SW Hannah			<input type="checkbox"/> Silver
Centre: SW Hannah			<input type="checkbox"/> Gold
Group: Bronze 2015-16			<input checked="" type="checkbox"/> All
Status: (Current)			
















Hide Completed Levels: ☒

Managing Participants: ? Key: ?

[Search](#)

[Change group](#) [Send message](#)

Results: 3

ID	First name	Last name	Group	Level	Volunteering	Physical	Skills	Expedition	Residential	Select
 1554499	Sharron	Hurst	Bronze 2015-16	B	 03/04/2017	 18/12/2016	 13/02/2017	 View	n/a	<input checked="" type="checkbox"/>
 1555170	Mary	Smith	Bronze 2015-16	B	 01/08/2017	 26/07/2017	 View	 View	n/a	<input checked="" type="checkbox"/>
 1554500	Kirsty	West	Bronze 2015-16	B	 01/08/2017	 26/07/2017	 View	 View	n/a	<input type="checkbox"/>

Results: 3

[Download to spreadsheet](#) [Archive users](#) [Change group](#) [Send message](#)

## Unarchiving a participant

### If you wish to unarchive one participant:

Find the participant you wish to unarchive by either using the **'Manage participant'** and **'Participant overview'** buttons, or by using the **'Find user'** search bar in the top right hand corner. Click on the **'Unarchive user'** button on the right-hand side. You will be asked to select a group to put the participant in and then click **'Change group'**.

**Participant profile: Bob Smith** [Communications](#)

Name: Bob Smith  
ID number: 1554498  
Centre: SW Hannah  
Licensed Organisation: SW Hannah

[Send message](#)  
[Add level](#)  
[Unarchive user](#)

**Change group** [X]

Select new group for participant(s)

Region: Training  
LO: SW Hannah  
Centre: SW Hannah  
Group: Bronze 2015-16

[Change group](#)

**Awards**

Award level	End date
Bronze	01/08/2017

Click on the title below to view and edit this participant's details.

[Account details \(show\)](#)

### If you wish to unarchive multiple participants:

Click **'Manage participants'** then **'Participant overview'** and select **'Archived'** in the status box, and then click **'Search'**. Select the participants you wish to unarchive by clicking the box to the right of their name or by clicking **'Select all'**. Click **'Unarchive user'** at the bottom of the page. A pop-up box will appear asking you to select a group to put the participants in, then click **'Change group'**.

**Location** [●]  
Region: Training  
LO: SW Hannah  
Centre: SW Hannah  
Group: (All)  
**Status: Archived**

**Subgroups** [○]  
(Please select)

**User details** [○]  
ID number:   
First name:   
Surname:

**Levels**  
☐ Bronze  
☐ Silver  
☐ Gold  
☒ All

[Search](#)

Results: 2

ID	First name	Last name	Username	Date Archived	Select all
1554498	Bob	Smith	BOBSMITH10	18/08/2017 16:29:31	<input checked="" type="checkbox"/>
1554510	Sylvia	Rust	SYLVIARUST	26/07/2017 14:17:52	<input checked="" type="checkbox"/>

Results: 2

[Unarchive user](#)

# Section five: Expedition set up

## Training

The training section is all of the preparation the participants have done prior to going on their practice expedition, e.g. camp craft, navigation, first aid, etc.

Click on **'Manage participants'** and then **'Expedition set up'**. Select the required group and click **'Search'**. Click on **'Expedition training'** and enter the date that the training was completed. You can then select the participants who have completed the training and click **'Approve training'** at the bottom of the page.

DofE Information

Participation Places

Award approvals

Manage participants

Participant overview

Create participant

Add next level

Manage alerts

Directly approve

Assessor's Reports

Add evidence

**Expedition set up**

Move participants

Subgroups

Manage adults

Manage infrastructure

News

Resources

Keep Safe

Reports

My Settings

DofE Essentials

Help

Location

Region: Training

LO: SW Hannah

Centre: SW Hannah

**Group: Bronze 2015-16**

Status: (Current)

Subgroups

(Please select)

User details

ID number:

First name:

Surname:

Levels

Bronze

Silver

**Gold**

Search

Hide participants with a complete Expedition section: ☒

[Expedition set up user guide and frequently asked questions](#)

**Expedition training (hide)**

Here you confirm that the participants selected have completed all elements of the Expedition Training Framework. Details can be found in the DofE resource zone. Approving the training will mark all elements as complete on the date selected.

\* Completed on:

Results:5

ID	First name	Last name	Group	Level	Select all	
1554499	Sharron	Hurst	Bronze 2015-16	B	<input type="checkbox"/>	Approved
1555170	Mary	Smith	Bronze 2015-16	B	<input type="checkbox"/>	Approved
1573884	Glenda	Smith	Bronze 2015-16	B	<input type="checkbox"/>	Not Started
1574910	Sam	Smith	Bronze 2015-16	B	<input type="checkbox"/>	Not Started
1554500	Kirsty	West	Bronze 2015-16	B	<input type="checkbox"/>	Approved

Results:5

Approve training

Practice and Qualifying expedition (show)

**Top tip:** The training completion date must be in the past, not the future.

## Practice expedition

Click on the 'Practice and Qualifying expedition' tab, select 'Practice' and complete all the fields marked with a red \*. Then select the participants you wish to add the practice expedition to and click on the 'Add expedition to participants' button at the bottom of the page.


**Top tip:** The expedition start point has to be either a postcode or a six figure grid reference (including the two grid letters). Click on the yellow '?' for further information.

### ☒ Practice and Qualifying expedition (hide)


By adding information here the expedition will be automatically approved. You can add route cards via the 'Add evidence' page. Each participant must be eligible to have the start date selected. You will not be able to select an ineligible participant. If you cannot select a participant a likely cause is a date clash with another part of the expedition section or the enrolment date.


\* Expedition type: ☒ Practice: ☐ Qualifying: ☐


\* Start date:


\* Wild country? Yes: ☐ No: ☒  Overseas expedition: ☐


\* Expedition location:

\* Expedition start point:   [eDofE Mapping](#)

Expedition end point:  











\* Mode of travel:  

Expedition notification no:  

Expedition aim:  

\* Number of days:

Results:5

ID	First name	Last name	Group	Level	Expedition summary	Select all
 <a href="#">1554499</a>	Sharron	Hurst	Bronze 2015-16		<a href="#">Add</a>	<input checked="" type="checkbox"/>
 <a href="#">1555170</a>	Mary	Smith	Bronze 2015-16		<a href="#">Add</a>	<input checked="" type="checkbox"/>
 <a href="#">1573884</a>	Glenda	Smith	Bronze 2015-16		<a href="#">Add</a>	<input checked="" type="checkbox"/>
 <a href="#">1574910</a>	Sam	Smith	Bronze 2015-16		<a href="#">Add</a>	<input checked="" type="checkbox"/>
 <a href="#">1554500</a>	Kirsty	West	Bronze 2015-16		<a href="#">Add</a>	<input checked="" type="checkbox"/>

Results:5

Print expedition summary

Print notification form

Add expedition to participants

[Notification Form Completion Notes](#)

## Qualifying expedition

Click on the **'Practice and Qualifying expedition'** tab, select **'Qualifying'** and complete all the fields marked with a **red \*** (remember to select **'Qualifying'** in the **'Expedition type'** box). Then select the participants you wish to add the qualifying expedition to and click on the **'Add expedition to participants'** button at the bottom of the page. If you have multiple groups, enter one aim at a time and select the relevant participants. The information will stay in the boxes so you can simply change the aim and then select the next group of participants.

**Top tip:** Enter the expedition details in advance and use the **'Print notification form'** button to generate your Green Form for expeditions in Wild Country (it will complete part of the form for you with details that have already been entered on eDofE).

### **Practice and Qualifying expedition (hide)**

By adding information here the expedition will be automatically approved. You can add route cards via the 'Add evidence' page. Each participant must be eligible to have the start date selected. You will not be able to select an ineligible participant. If you cannot select a participant a likely cause is a date clash with another part of the expedition section or the enrolment date.

\* Expedition type: Practice: ☐ Qualifying: ☒

\* Start date:

\* Wild country? Yes: ☐ No: ☒ Overseas expedition: ☐

\* Expedition location:

\* Expedition start point:  [eDofE Mapping](#)

Expedition end point:

\* Mode of travel:

Expedition notification no:

\* Expedition aim:






**Proposed hours of activity** (shows minimum hours - please amend to meet your plans)

DAY: 1 2

Journeying?

Exploring?

Results:5

ID	First name	Last name	Group	Level	Expedition summary	Select all
 <a href="#">1554499</a>	Sharron	Hurst	Bronze 2015-16	B	<a href="#">LP0002403405</a> 03/06/2017 Approved <a href="#">Add</a>	<input checked="" type="checkbox"/>
 <a href="#">1555170</a>	Mary	Smith	Bronze 2015-16	B	<a href="#">LP0002403405</a> 03/06/2017 Approved <a href="#">Add</a>	<input checked="" type="checkbox"/>
 <a href="#">1573884</a>	Glenda	Smith	Bronze 2015-16	B	<a href="#">LP0002403405</a> 03/06/2017 Approved <a href="#">Add</a>	<input checked="" type="checkbox"/>
 <a href="#">1574910</a>	Sam	Smith	Bronze 2015-16	B	<a href="#">LP0002403405</a> 03/06/2017 Approved <a href="#">Add</a>	<input checked="" type="checkbox"/>
 <a href="#">1554500</a>	Kirsty	West	Bronze 2015-16	B	<a href="#">LP0002403405</a> 03/06/2017 Approved <a href="#">Add</a>	<input checked="" type="checkbox"/>

Results:5

Print expedition summary

Print notification form

Add expedition to participants




## Presentation

Click on the **‘Expedition presentation’** tab and complete all the fields marked with a red \*. Then select the participants you wish to add the presentation to and click on the **‘Set up presentation’** button at the bottom of the page.

**Top tip:** Presentation details can be overwritten but not deleted, so ensure the presentation is added to the correct participants.

### Expedition presentation (hide)

Add the presentation details here. This will overwrite anything the participant may have entered.

* Presentation given to (name):	<input type="text" value="Timothy Books"/>	
* Role:	<input type="text" value="Assessor"/>	
* Date:	<input type="text" value="23/07/2017"/>	
* Presentation style:	<input type="text" value="Verbal"/>	

Results:5

# Section six: Alerts and Assessor's Reports

## Approving Programme Planners

To help Leaders run their eDofE sessions as smoothly as possible, we recommend they ask the participants to complete a paper copy of the relevant Programme Planner in Appendix 3 beforehand. This will get the participant to think about all of the information they will need to enter on eDofE in advance, so it can simply be inputted during the training session.

Once a participant has entered their activity choices onto eDofE, the Primary Leader will need to approve them. An alert will appear in the Leader's communication box on their homepage. The black number refers to the amount of participants and the red number to the amount of alerts.

Communications
<a href="#">Messages: None</a>
<a href="#">Alerts: 1 (2)</a>
<a href="#">Assessor's Reports: None</a>
<a href="#">News</a>
<a href="#">Contacts</a>

They can either click on the '**Alerts**' button in their communication box or they can click on the section with an alert, marked by a warning triangle in an orange box, within '**Participant overview**'.

Check that all of the information is correct and that the activity does count towards the section. Once the Leader is happy, they may click '**Approve**'.

View Award - Sandra Smith (1577442)

Close X

<b>Physical</b>	6 Months	Status:	Programme planner submitted
Start Date:	02/07/2017	<b>Assessor's report</b>	
Type:	Dance	<div></div>	
Detail:	Belly Dancing		
Location:	The Belly Dancing Association in Stourton. I will attend classes every Tuesday evening.		
Goals:	To improve my skills enough to be able to take part in a show.		
Assessor:	Vicky String		
Position:	Belly Dance Coach		
Tel:		Email:	
<div>Approve</div>		<div>Query</div>	<div>Show or hide evidence</div>
<b>Comments</b>			
There are no comments on this section.			

A green box will appear at the top of the screen confirming the Programme Planner has been approved.



## Evidence


In order for a section to be completed, there must be an appropriate Assessor's Report. In addition to this, participants may wish to upload other evidence, such as photos, activity logs or further details of the activities they have been undertaking. When a participant adds new evidence, their Leader will receive an alert. Click on the **'Alerts'** button in the **'Communications'** box on the right-hand side, which will take them to the relevant participant.

Communications	
Messages:	None
Alerts:	1 (1)
Assessor's Reports:	None
News	
Contacts	



Click on the section with the alert in it, marked by a warning triangle in an orange square.

**Manage alerts**

**Communications**





To action alerts for an individual, click on the  symbol below. To approve multiple alerts without checking the contents use the Select column and 'Approve checked' button. The participant will receive a confirmation message.

**Key**

-  Programme planner or evidence alert.
-  Section alert. Cannot be approved without viewing.

Approve checked

Results: 1

ID	First name	Last name	Group	Level	Volunteering	Physical	Skills	Expedition	Residential	Select
 <a href="#">1574910</a>	Sam	Smith	Bronze 2015-16	B	X				n/a	<input type="checkbox"/>
						<a href="#">24/10/2016</a>	<a href="#">17/10/2016</a>	<a href="#">View</a>		

Click on **'Show or hide evidence'** to see the evidence submitted. Leaders can click on the image to enlarge it. To rotate evidence, click **'Edit'** and then rotate the image in the appropriate direction and click **'Save'**. This can be especially helpful if Assessor's Reports have been uploaded the wrong way round!

If the Leader is happy the evidence is suitable, they may tick the box and click **'Approve'**. They can also delete evidence or mark it as an Assessor's Report by clicking on the relevant button.

Goals: *I'd like to improve my fitness and win 5 races.*



Assessor: *Heather Thompson*


Position: *Sailing Instructor*

Tel: [01234 567890](tel:01234567890) Email: [sailing@sailing.com](mailto:sailing@sailing.com)

Unapprove

Show or hide evidence

  
sailing.jpg  
 Edit ☒

Select All: ☒ 

Query Delete Unapprove Mark as Assessor's Report Approve

## Assessor's Reports

For guidance on what is required for an Assessor's Report, please look at *The Handbook for DofE Leaders* (page 21 in the 7<sup>th</sup> Edition).

For Assessor's Reports that have been uploaded as images (e.g. a photo of the Assessor's Report sheet), follow the instructions for approving evidence.

If an Assessor's Report has been submitted through the online portal ([eDofE.org/Assessor](http://eDofE.org/Assessor)), then it will show within the '**Communications**' box on the Leader's homepage. Click on '**Assessor's Reports**'. They can then check the content is appropriate, tick the box on the right and click '**Send to participant**'.

### Communications

[Messages: None](#)

[Alerts: 1 \(3\)](#)

[Assessor's Reports: \(1\)](#)

[News](#)

[Contacts](#)

Once this is done, the section needs to be directly approved (see page 37 for the '**Directly approve**' function).


### Assessor's Reports

### Communications

#### From DofE.org

Below is a list of all the Assessor's Reports submitted via [www.DofE.org](http://www.DofE.org). Select report and click 'Send to participant'. It will be automatically approved.

Results: 1

ID	Name	Level	Section details	Assessor Details	Assessment Text	Date submitted	Select all
 <a href="#">1574910</a>	Sam Smith	<b>B</b>	Volunteering Status: Programme planner submitted	Kirsty Rolands Manager Hannah.trent@dofe.org	Start date: 19/10/2016 End date: 19/01/2017 Sam attended every Saturday morning from 9am - 12pm for 3 months. Sam learnt how to use the till, price items and to cash up at the end of the day. In addition Sam learnt about displaying items in the shop and restocking the shelves. Sam was a pleasure to have around and I really hope he continues to volunteer in the future!	21/08/2017	<input checked="" type="checkbox"/>

Page 1 of 1

View 1 - 1 of 1

Results: 1

Delete report


Download to spreadsheet














Send to participant


**Top tip:** If a Leader is adding the Assessor's Report, then they can do this by following the guidance in the '**Adding evidence as a Leader**' section on the next page.

## Adding evidence as a Leader

To add a piece of evidence, click on **'Manage participants'** then **'Add evidence'**. Select the type of evidence you wish to add (e.g. text) and then complete the fields marked with a **red \***. If the item is an Assessor's Report, tick the box. Choose a group or search for an individual user, then select the section that you wish to add evidence to (it will automatically default to 'Volunteering') and finally click **'Search'**.


 Hannah Trent  
ID No: 1554475  
[View/edit my profile](#)

-  DofE Information
-  Participation Places
-  Award approvals
-  Manage participants
  - Participant overview
  - Create participant
  - Add next level
  - Manage alerts
  - Directly approve
  - Assessor's Reports
  - Add evidence**
  - Expedition set up
  - Move participants
  - Subgroups
-  Manage adults
-  Manage infrastructure
-  News
-  Resources
-  Keep Safe
-  Reports
-  My Settings
-  DofE Essentials
-  Help

 CEOP REPORT  
ceop.police.uk


### Add evidence Communications

What evidence would you like to add?




**Photos**

[.jpg,.jpeg,.jpe,.gif,.bmp,.png]




**Video**

[.mpg,.mpeg,.mp4,.avi,.mov,.wmv,.flv]





**Text**



**Other**


[.doc,.docx,.xls,.xlsx,.pdf,.txt,.rtf,.ppt,.pptx,.pps,.ppsx]


**Things to look out for** [Hide](#)

-  Include dates, details of activities and thoughts about what you achieved
-  Please give your evidence a sensible name

\* Name of evidence:

\*   
0/1000 characters used

Assessor's report: ☐ 


**Location** 


Region:


LO:

Centre:

Group:

Status:  

**Subgroups** 

**User details** 

ID number:

First name:

Surname:

☒ **Volunteering**

☐ **Physical**











☐ **Skills**

☐ **Expedition**

☐ **Residential**

**Search**

Select the person you wish to add the evidence to by clicking in the box to the right of the participant and click **'Add evidence'**.

ID	First name	Last name	Group	Level	Section	Select all
 <a href="#">1554499</a>	Sharron	Hurst	Bronze 2015-16		Physical	<input type="checkbox"/>
 <a href="#">1554500</a>	Kirsty	West	Bronze 2015-16		Physical	<input type="checkbox"/>
 <a href="#">1555170</a>	Mary	Smith	Bronze 2015-16		Physical	<input type="checkbox"/>
 <a href="#">1573884</a>	Glenda	Smith	Bronze 2015-16		Physical	<input type="checkbox"/>
 <a href="#">1574910</a>	Sam	Smith	Bronze 2015-16		Physical	<input checked="" type="checkbox"/>

Results: 5

**Add evidence**

## Section seven: Monitoring eDofE

For a document giving an overview of completing an Award on eDofE, please see Appendix 2.

### Participant overview

Click on **'Participant overview'** to see a breakdown of which sections participants have completed. By clicking on the **'Key'**, you can see an explanation of what the different symbols mean.

Within the **'Location'** box, you can choose to view information about a particular group or all participants by selecting an option from the **'Group'** drop-down menu. You can also see participants who are current, new, active, inactive or archived in the **'Status'** drop-down menu. Click on the orange '?' for an explanation of the different statuses.

**Location**

Region: Training

LO: SW Hannah

Centre: SW Hannah

Group: Bronze 2015-16

Status: Inactive ?

Participant overview icons

**Key**

- Not started
- Section is in draft
- Programme planner approved and section underway
- Something needs approving
- The section is complete and awaiting approval
- Section completed, no further action needed

You can select participants to archive, change group or send a message by clicking the relevant button at the bottom of the page. You can also **'Download to spreadsheet'**, which will open an Excel document with details of dates, activities and the status of each section for the participants selected.

**Top tip:** See **'Reports'** on page 38 to find out how to print and display this on a noticeboard.

ID	First name	Last name	Group	Level	Volunteering	Physical	Skills	Expedition	Residential	Select
<a href="#">1554499</a>	Sharron	Hurst	Bronze 2015-16	B	01/08/2017	24/05/2017	31/05/2017	View	n/a	<input type="checkbox"/>
<a href="#">1555170</a>	Mary	Smith	Bronze 2015-16	B	01/08/2017	26/07/2017		View	n/a	<input checked="" type="checkbox"/>
<a href="#">1573884</a>	Glenda	Smith	Bronze 2015-16	B	09/01/2017	15/09/2016	04/09/2016	View	n/a	<input type="checkbox"/>
<a href="#">1574910</a>	Sam	Smith	Bronze 2015-16	B	19/10/2016	24/10/2016	17/10/2016	View	n/a	<input type="checkbox"/>
<a href="#">1554500</a>	Kirsty	West	Bronze 2015-16	B	01/08/2017	26/07/2017		View	n/a	<input type="checkbox"/>

Results: 5

Download to spreadsheet
Archive users
Change group
Send message

## Directly approve

The directly approve function brings up a list of participants that have sections with a piece of evidence marked as an Assessor's Report.

Click on 'Manage participants' then 'Directly approve'. You can either select a group or select all groups, then click 'Search'.

**Directly approve** Communications

Here you can view and directly approve any section for a participant where all of the requirements have been met.

**Location** ☐

Region: Training  
LO: SW Hannah  
Centre: SW Hannah  
Group: (All)

**Search**

Results: 1

ID	First name	Last name	Group	Level	Volunteering	Physical	Skills	Expedition	Residential
1574910	Sam	Smith	Bronze 2015-16	B			Section completed	Draft	n/a

Results: 1

Click on the appropriate section and check the Assessor's Report is acceptable. You can then click on the 'Directly approve section' button at the bottom of the page.

**Volunteering** 3 Months Status: Programme planner submitted

Start Date: 19/10/2016

Type: Helping a charity or community organisation

Detail: Charity Shop

Location: Sue Ryder Charity Shop in Weston-Super-Mare. Every Saturday from 9am - 12pm.

Goals: To learn how to work the till and to restock the shop effectively.

Assessor: Kirsty Rolands

Position: Manager

Tel: Email:

**Approve** **Query** **Show or hide evidence**

**Assessor's report**

Start date: 19/10/2016  
End date: 19/01/2017  
Sam attended every Saturday morning from 9am - 12pm for 3

**Assessor's report**

**Comments**

There are no comments on this section.

**Directly approve section**

**Top tip:** If the evidence marked as an Assessor's Report isn't appropriate, then follow up with the participant outside of eDofE in case the participant doesn't log in for a while. We recommend deleting the evidence which is not an Assessor's Report.

## Reports

The Reports section allows you to pull off user information for participants and adults within your LO. Click on **'Reports'** on the navigation panel. You can then select which report you would like to use.

### Usage reports

To retrieve participant usernames, select **'Participant usage'**. You can either select a group or select all groups, then click **'Run report'**.

**Reports** Communications

Reporting Suite

Select	Report name	Report details
<input type="radio"/>	User information	Participant information for selected group including ID, Address, D.O.B etc.
<input checked="" type="radio"/>	Participant usage	A report of the last sign in of participants.
<input type="radio"/>	Adult usage	A report of the last sign in of adults.
<input type="radio"/>	Participant move report	A list of participants moved in or out of the selected area.

**Location**

Region: Training

LO: Katie Cox - Test LO

Centre: Regional Office Test Cer

Group: (All)

Status: (Current)

**Subgroups**

(Please select)

**User details**

ID number:

First name:

Surname:

**Run report**

On the data protection prompt screen, select **'I Agree'** and your report will download as a CSV file.

Open this to present a list of participants, their eDofE ID numbers (Column A), usernames (Column H) and the date of their last login (Column I). N.B. Expand Column I to display the date.

	A	B	C	D	E	F	G	H	I	J
1	eDofE_ID	first_name	last_name	award_reg	award_lic	award_cer	award_cer	username	last_login	days_ago
2	1576079	Isabel	Smith	Training	Katie Cox	Regional (Bronze 20	IsabelSmith24	05/09/2017 16:53	1	
3	1576080	Michael	McIntyre	Training	Katie Cox	Regional (Bronze 20	MichaelMcIntyre1	01/09/2017 14:39	5	
4	1576082	Jessica	Simpson	Training	Katie Cox	Regional (Silver 201	JessicaSimpson24			
5	1576083	Kenny	Login	Training	Katie Cox	Regional (Silver 201	KennyLogin	04/08/2017 12:32	33	

This is a useful report to use when you run an initial participant eDofE session, so that you have participant usernames to hand for their first time logging in. Subsequently, it will also indicate which participants are engaging with eDofE – e.g. where Columns I and J are blank, this indicates that these participants have never logged in.

You can also pull off a similar report for adults within your LO (based on their role type), showing usernames, dates of last login and the number of outstanding alerts they have. From this, you can determine which adults are engaging with eDofE and follow up with further training as required.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	eDofE_ID	Name	award_reg	award_lic	award_cer	Alerts	username	last_login	group_CS	Messages	Role	last_login_String	
2	1469787	Jenny Boc	Training	Katie Cox	Regional (	1	JennyBoo	#####	Silver 201	0	Co-ordina	05/09/2017(1 Days ago)	
3	1469792	Gerry Edw	Training	Katie Cox	Regional (	0	GerryEdwin		Bronze 20	0	Co-ordinator		

## User information reports

To find out the participants' dates of birth (which will be their password when they first log in); you will need to run a 'User Information Report'. To do this, select '**User Information**'. You can either select a group or select all groups, then click '**Run report**'.

Select	Report name	Report details
<input checked="" type="radio"/>	User information	Participant information for selected group including ID, Address, D.O.B etc.

**Location**

Region: Training

LO: SW Hannah

Centre: SW Hannah

Group: ((All))

Status: ((Current)) ?

On the data protection prompt screen, select '**I Agree**' and your report will download as a CSV file. Open the report and Column D will show the dates of birth. You can then copy and paste this into a new spreadsheet with the usernames from the '**Participant Usage**' report, ready for the first eDofE session with participants.

	A	B	C	D	E	F	G	H	I
1	eDofE_ID	first_name	last_name	date_of_birth	account_status	award_region	award_licensed_organisation	award_centre	award_centre_group
2	1554499	Sharron	Hurst	16/05/2001	Active	Training	SW Hannah	SW Hannah	Bronze 2015-16
3	1554500	Kirsty	West	23/10/1999	Active	Training	SW Hannah	SW Hannah	Bronze 2015-16
4	1555170	Mary	Smith	09/06/1999	Active	Training	SW Hannah	SW Hannah	Bronze 2015-16
5	1573884	Glenda	Smith	21/12/2001	Active	Training	SW Hannah	SW Hannah	Bronze 2015-16
6	1574910	Sam	Smith	09/07/2002	Active	Training	SW Hannah	SW Hannah	Bronze 2015-16
7	1577442	Sandra	Smith	15/04/2002	Active	Training	SW Hannah	SW Hannah	Silver 2016-17
8	1579616	Katie	River	16/08/2000	Active	Training	SW Hannah	SW Hannah	Silver 2015
9	1584131	hanah	trent	05/09/2001	New	Training	SW Hannah	SW Hannah	Gold 2017-18

## Reporting suite

The Reporting Suite has the capability to draw business intelligence reports with useful statistics – e.g. Awards achieved, Awards started or the number of participants with only one section of their Award left to complete.

Please refer to the 'Reporting Suite User Guide' for further information, which can be found on the 'South West Managers' webpage.



## Section eight: Award approvals and verifying

### Approving an Award

If the Leader approves the final section of an Award, a pop-up box will notify them of this. The comments box is for them to write any comments to the Award Verifier in and won't be seen by the participant. They may wish to write something in here if they have additional information about an activity which may otherwise look like it doesn't meet the criteria, or if they have additional supporting evidence about the participant's Award. Click **'Save'**.

Save section end date

Section end date: 23/07/2017

This is the presentation date.

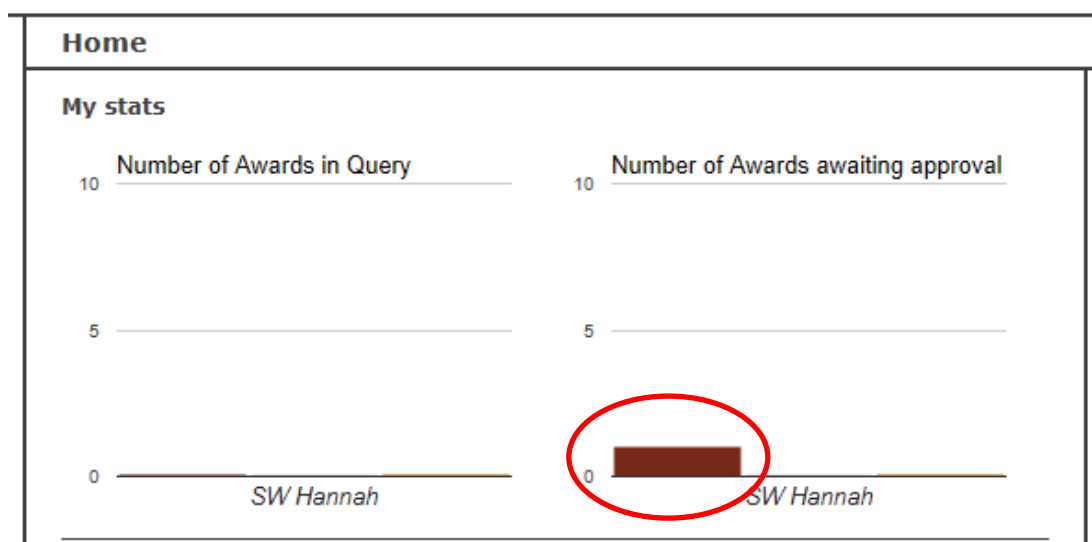
This is the final section and approving it will send it to the LO for their approval.

Please add any notes or comments you would like to submit with this Award.

0/250 characters used

Save

The graph on the DofE Manager homepage tells you how many Awards are awaiting verification and how many Awards have been queried.



### The verification process

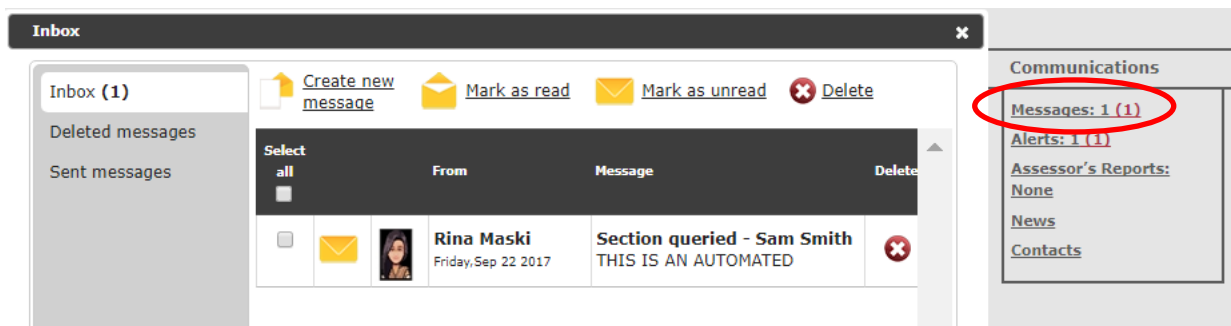
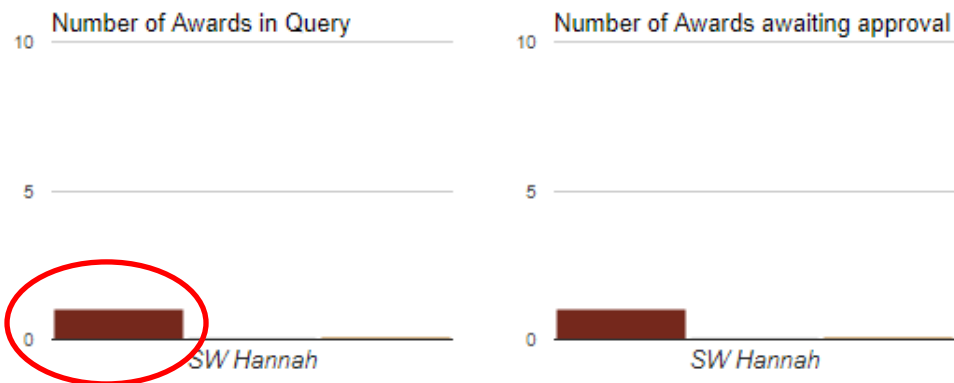
The Award Verifier will not currently receive any notifications that there are Awards awaiting their approval, so please ensure you agree with the Award Verifier a method to notify them. Examples include emailing the Award Verifier once Awards awaiting approval appear on your homepage (the Leader has then approved the final section of an Award) or the Award Verifier logging into their account at least once a month to check for Awards. Once an Award has been approved, the participant and the Leader that approved the final section will receive a notification.



## If an Award is queried

If an Award is queried, it will show in the graph on the DofE Manager homepage and a message will show in the communications box on the right-hand side for the Leader. Follow up with the participant as necessary outside of eDofE. The Award will be reopened so that the participant can edit the appropriate section or add additional information. Once the participant has done this, the Leader will need to approve the section again and the Award will then go back to the Verifier.

### My stats



## Issuing badges and certificates

Badges and certificates can only be issued once the Award has been verified. Gold Awards require final approval by the South West Regional Office. A template for printing the name and date on a certificate can be found in the DofE Resource Zone or by clicking on this link: <https://www.dofe.org/wp-content/uploads/2017/07/BRONZE-Award-certificate-template.pdf>

Once a Gold Award has been approved at regional level, the badge or brooch will be posted to the DofE Manager to pass on to the centre Co-ordinator. If the participant has chosen to collect their certificate at a Gold Award Presentation, they will be invited to an event where their certificate will be presented. Otherwise, the certificate will be sent with the badge or brooch from the Regional Office.

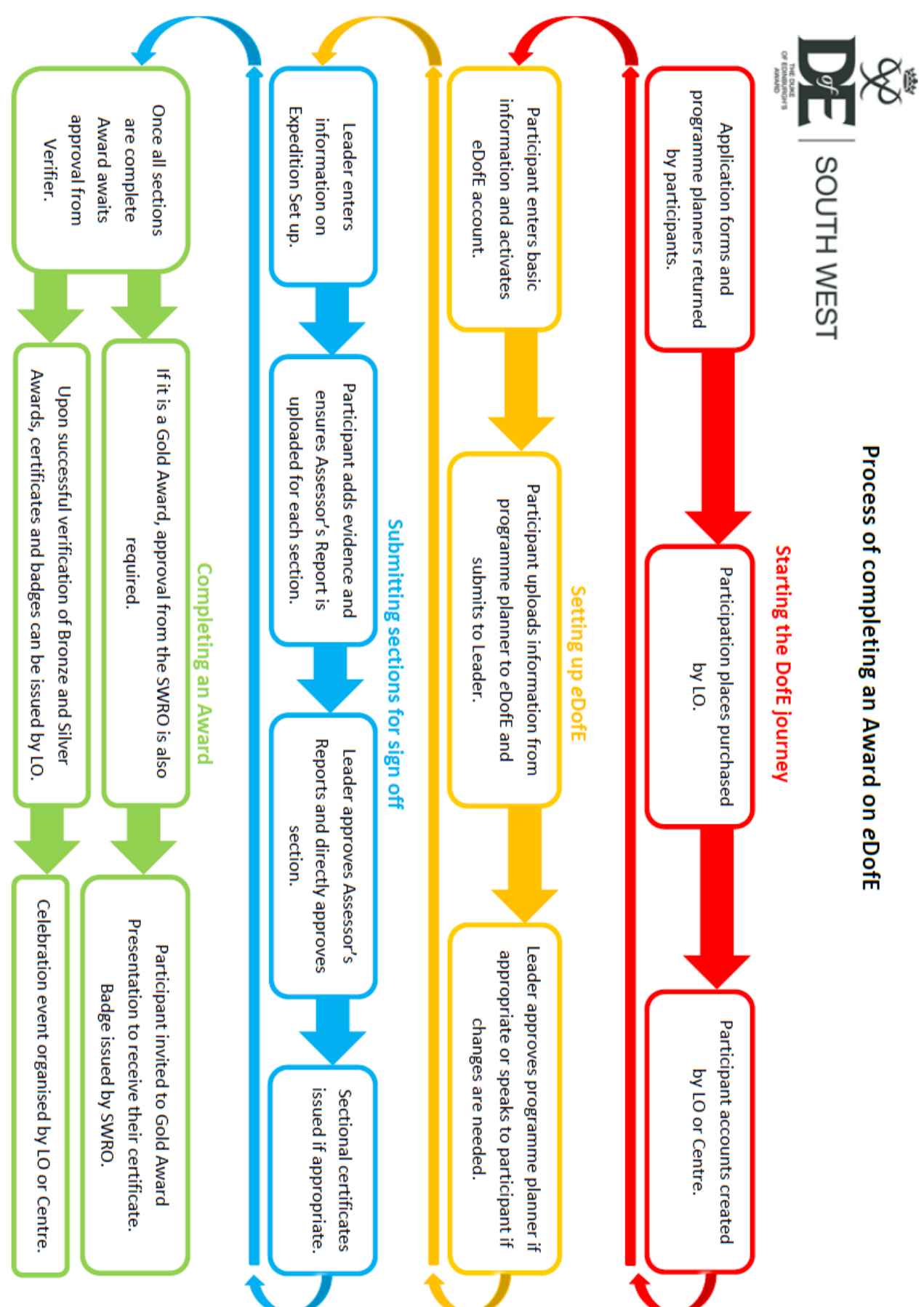
# Appendix 1 – Permissions

Items with a \* can be allowed or disallowed through the permissions function.

	Helper	Leader	Co-ordinator	Administrator	Manager
Access eDofE Mapping	✓	✓	✓	✓	✓
Use the eDofE messaging system (between adults in their hierarchy)	✓	✓	✓	✓	✓
View DofE information	✓	✓	✓	✓	✓
View DofE contacts	✓	✓	✓	✓	✓
Access the eDofE Resource Zone	✓	✓	✓	✓	✓
View eDofE news	✓	✓	✓	✓	✓
View the <i>LifeZone</i>	✓	✓	✓	✓	✓
View their own training records	✓	✓	✓	✓	✓
Use the eDofE messaging system (between participants in their hierarchy)		✓	✓	✓	✓
Manage participants		✓	✓	✓	✓
Archive/unarchive participants		✓	✓	✓	✓
Approve sections and submit Awards for verification		✓	✓	✓	✓
Access eDofE 'Reports' page (not the reporting suite) and downloads		✓	✓	✓	✓
Create participant and add new levels		✓*	✓*	✓*	✓
Abandon level(s)		✓*	✓*	✓*	✓
Change Award enrolment and section dates		✓*	✓*	✓*	✓
Use Leader recorded functions		✓*	✓*	✓*	✓*
Can add resources		✓*	✓*	✓*	✓
Can add news		✓*	✓*	✓*	✓
Create new adults			✓*	✓*	✓
Change adult permissions (for accounts lower than them in the hierarchy)			✓	✓	✓
Archive and unarchive adults			✓	✓	✓
Manage DofE groups			✓*	✓*	✓
Be allocated as a group Leader			✓*	✓*	✓
Update centre information			✓	✓	✓
View groups within centre			✓*	✓*	✓
Move adults between centres and Licensed Organisations			✓*	✓*	✓
View adult eDofE usage reports (via eDofE 'Reports' page)			✓	✓	✓
Allocate participation places			✓*	✓*	✓
Recall participation places			✓*	✓*	✓
View and change LO information				✓*	✓
Update LO contact details				✓*	✓
View all centres within the LO				✓	✓
Create new centres				✓*	✓
View and query Awards awaiting approval				✓*	✓
Verify Awards				✓*	✓
Purchase participation places (if ASL				✓*	✓

account exists)					
Use LO level participation places				✓*	✓

# Appendix 2 – Process of completing an Award on eDofE





## **Bronze Award Programme Planner**

### Volunteering, Physical and Skills sections

Full name .....

	Volunteering	Physical	Skills
<b>Timescale (in months)</b> <i>Please tick one of the following options</i>	<input type="checkbox"/> Option 1: 3 <input type="checkbox"/> Option 2: 3 <input type="checkbox"/> Option 3: 6	3 6 3	6 3 3
<b>Activity chosen</b>			
<b>Start date</b>			
<b>Where will you do it?</b> <i>E.g. Corston Netball Club</i>			
<b>When will you do it?</b> <i>E.g. every Wednesday from 6-7pm</i>			
<b>What are your goals?</b> <i>E.g. improve my defence by letting less balls into the D this season</i>			
<b>Assessor's* full name</b>			
<b>Assessor's position</b> <i>Include their email/phone number if you know it</i>			

*\*An Assessor checks on your progress and agrees the completion of a section of your programme. They will produce or sign off the relevant Assessor's report for that section, which is uploaded into eDofE. An Assessor must be independent, therefore they cannot be a member of your family.*

## Silver Award Programme Planner (direct entrant)

### Volunteering, Physical and Skills sections

Full name .....

	Volunteering	Physical	Skills
<b>Timescale (in months)</b> Please tick one of the following options	<input type="checkbox"/> Option 1: 6 <input type="checkbox"/> Option 2: 6 <input type="checkbox"/> Option 3: 12 <input type="checkbox"/> Option 4: 12	3 12 3 6	12 3 6 3
Activity chosen			
Start date			
<b>Where will you do it?</b> E.g. Corston Netball Club			
<b>When will you do it?</b> E.g. every Wednesday from 6-7pm			
<b>What are your goals?</b> E.g. improve my defence by letting less balls into the D this season			
Assessor's* full name			
<b>Assessor's position</b> Include their email/phone number if you know it			

\*An Assessor checks on your progress and agrees the completion of a section of your programme. They will produce or sign off the relevant Assessor's report for that section, which is uploaded into eDofE. An Assessor must be independent, therefore they cannot be a member of your family.

## Silver Award Programme Planner (non-direct entrant)

### Volunteering, Physical and Skills sections

Full name .....

	Volunteering	Physical	Skills
<b>Timescale (in months)</b> Please tick one of the following options	<input type="checkbox"/> Option 1: 6 <input type="checkbox"/> Option 2: 6	<input type="checkbox"/> 3 <input type="checkbox"/> 6	<input type="checkbox"/> 6 <input type="checkbox"/> 3
<b>Activity chosen</b>			
<b>Start date</b>			
<b>Where will you do it?</b> <i>e.g. Corston Netball Club</i>			
<b>When will you do it?</b> <i>E.g. every Wednesday from 6-7pm</i>			
<b>What are your goals?</b> <i>E.g. improve my defence by letting less balls into the D this season</i>			
<b>Assessor's* full name</b>			
<b>Assessor's position</b> <i>Include their email/phone number if you know it</i>			

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## Gold Award Programme Planner (direct entrant)

### Volunteering, Physical and Skills sections

Full name .....

	Volunteering	Physical	Skills	Residential
<b>Timescale (in months)</b> Please tick one of the following options	<input type="checkbox"/> Option 1: 12 <input type="checkbox"/> Option 2: 12 <input type="checkbox"/> Option 3: 18 <input type="checkbox"/> Option 4: 18	6 18 6 12	18 6 12 6	5 days, 4 nights A shared activity or specific course with people you've never met before, away from home or in an unfamiliar environment.
Activity chosen				
Start date/end date				
<b>Where will you do it?</b> E.g. Corston Netball Club				
<b>When will you do it?</b> E.g. every Wednesday from 6-7pm				
<b>What are your goals?</b> E.g. improve my defence by letting less balls into the D this season				
Assessor's* full name				
Assessor's position Include their email/phone number if you know it				

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## Gold Award Programme Planner (non-direct entrant)

### Volunteering, Physical and Skills sections

Full name .....

	Volunteering	Physical	Skills	Residential
<b>Timescale (in months)</b> Please tick one of the following options	<input type="checkbox"/> Option 1: 12 <input type="checkbox"/> Option 2: 12	<input type="checkbox"/> 6 <input type="checkbox"/> 12	<input type="checkbox"/> 12 <input type="checkbox"/> 6	5 days, 4 nights A shared activity or specific course with people you've never met before, away from home or in an unfamiliar environment.
Activity chosen				
Start date/end date				
Where will you do it? E.g. Corston Netball Club				
When will you do it? E.g. every Wednesday from 6-7pm				
What are your goals? E.g. improve my defence by letting less balls into the D this season				
Assessor's* full name				
Assessor's position Include their email/phone number if you know it				

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