

# 'Leader Recorded'

# *e*DofE guide for Leaders of young people unable to engage with *e*DofE because of additional needs and cultural factors (LO users, Co-ordinators and Leaders)

# Introduction

# What is 'Leader Recorded'?

From 1<sup>st</sup> April 2013 it is compulsory for all participants to be registered on eDofE. The DofE has developed functionality to allow specific Leaders (or other adults in the participant's hierarchy) to act in eDofE on behalf of participants who are unable to engage fully in the system because they have additional needs, or are prevented from using technology for cultural/religious reasons.

Participants must currently perform the following functions on eDofE themselves:

- Entering or amending all mandatory personal information and all mandatory fields.
- Adding a profile picture and thumbnail image.
- Choosing or changing section timescales.
- Completing programme plans for each of the Physical, Skills, Volunteering and Residential (Gold only) sections (should be auto approved by an adult).
- Adding Expedition aim and goals.
- Gold participants must complete the GAP tab.
- Creating an individual Achievement Pack once each Award is approved.

This 'Leader Recorded' functionality will allow any adult, with permission, to carry out the above functions for specific participants or groups on their behalf. The Leader will still have the full range of functionality that other Leaders have access to.

# As a Leader/adult how do I get the 'Leaders Recorded' function?

Groups, centres and Licensed Organisations can apply to a DofE Region or Country Office\* to use functionality known as 'Leader Recorded'. Application forms are available from Regional Offices and must be completed and submitted via the Leader's LO. The Regional Office then decides whether or not to approve the application.

If approved, the functionality can then be granted by a DofE Regional Office (or a System Administrator) via a permission. Only designated DofE Regional Office staff will be able to grant this permission to adults and participants in their Region. The Regional Office will be the main contact through which LO adults will request the 'Leader Recorded' permission.

The permission will be applied to individual participants or to a DofE group **and** specific adults who work with them. eDofE will then allow an adult with the functionality to access a 'Leader Recorded' participant account via their own adult account and have the full functionality that the participant would have. They will also be able to perform some mass actions on selected participant accounts that currently only the participant themselves can undertake.

The function is built so that an adult must be given permission first AND then individual participants or the whole group must also be 'tagged'. This is covered below:

<sup>\*</sup> The DofE Charity has both Regional and Country Offices (in Scotland, Northern Ireland and Wales). However, for ease of use, throughout this document we will refer all simply A 'DofE Regions' or 'Regional Offices'.

# How do I use 'Leader Recorded' functions?

**For an individual participant** – locate the participant's overview screen and press the 'Sign in as......' button.

t overview: not real145  Name: not real145  Dofte group: Dofte group: Dofte centre: UK Services Team Dofte LO: UK Services Team Dofte LO: UK Services Team Dofte Leaders: Training Dofte Leaders: Training Dofte Leaders: Training Dofte Leaders: Test Name, test name16, Test name2, test name21 Last sign in: 24/01/2013 Status: Active  u sure?  return to your own adult account after being gned in as the participant - click the top right 'Go	Co-ordinate	Dr Find u	ser
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This will sign you in to the participant's account as the participant, with full functionality.

eDE	My Bronze DofE programme	
Home		Shop Go back
You are here > <u>Home</u>		
not real145	Home	Communications
ID:428615	My sections and progress	Messages: 3 (3)
Enrolment date: 10/10/2011		<u>News</u> Contacts
<u>View/edit my profile</u>	Doing section Not started Not started	Your Achievement Pack
1 DofE information	Volunteering Physical Skills	Remember to upload lots of good photos & info for
My Bronze DofE		your FREE pdf pack. CLICK FOR DETAILS
🔁 Resources		
<u>î</u> Keep safe	- Doing section	
🗽 My settings		DE monte de la companya de la compan
<mark>?</mark> Help	Expedition	

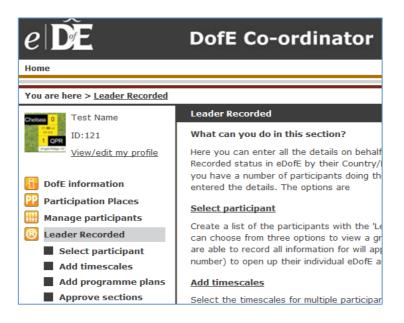
- 1) You can act as the participant in their account to edit the profile, add/edit sectional programme plans, evidence etc.
- 2) If the account is 'new' and has not been accessed before you must complete the mandatory fields on the participant's behalf: address, emergency contact, new password, ethnicity etc. at the beginning. Ensure you have agreed with your Manager and the participant what you should be entering in to their account.
- Any work you submit to the nominated Leader (which may be yourself) also needs to be manually approved through your own Leader's screen.
   Top Tip: As you have submitted all the work in the participant's account yourself, just use your own ALERTS screen and 'mass approve' the work to save you checking it twice!
- 4) The participant can still access their own account if you have provided the username and password, for example to upload photos etc.

- 5) eDofE will keep a record of which participant accounts you have accessed and when.
- 6) To go back to your adult account without closing the browser simply **click the top right 'Go back' button** (in red box). **Do not use** the top left back button in your browser.

### For a whole Group

If a group has been 'tagged' as 'Leader Recorded', all the participants' accounts in the group are accessible to the Leader using the 'Leader Recorded' function. However you can simply work with individual participants.

There is also a new 'Leader Recorded' menu function which gives you several options of mass actions for a number of participants in the group at the same time.



**Select participant –** use the filter to list participants who have been 'tagged'. As you see below only one participant has a tag so only he appears.

Chekoa o 🔡 Test Name	Select Participant	Communications
ID:121 View/edit my profile	Choose from the filters below to create a list of the participants with the 'Leader Recorded' p You can choose from the three options to view a group, subgroup or individual. Only particip, information for will appear on the list. Click on the 'key' image to open up their individual eDo You can only access one participant at a time. Use the 'Add timscales' 'Add programme plans record the same details for multiple participants.	ants you are able to record all fE account and record details.
Participation Places	Location    Subgroups	
🔠 Manage participants	Region: Training	
🔞 Leader Recorded		
Select participant	LO: Windsor Head Office	
Add timescales	Centre: UK Services Team 🔹 User details 💿	
Add programme plans	Group: Bronze Group 1	
Approve sections	First name: not	
🔀 Manage groups	Status: Active Surname: real145	
🔛 Manage adults		
🙆 Manage centre	Search	
News		
🔁 Resources	ID <u>First name Surname Group</u> <u>Level</u> Volunteering Physical Skills	Expedition Residential Log in
间 Keep safe		
Reporting	428615 not real145 Bronze Group 1	N/A 0000
🛐 My settings	10/10/2011 01/11/2011 01/11/2011	View

If the after the whole group is 'tagged' – all the participants in the group will appear here.

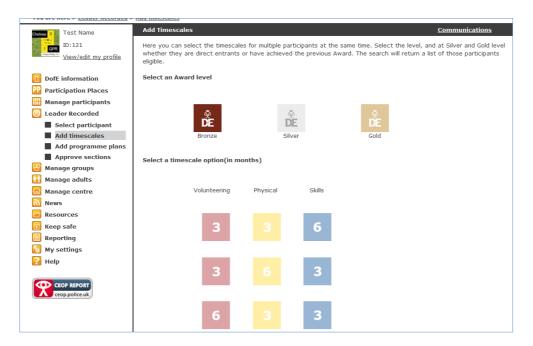
#### eDofE LEADERS guide to 'Leader Recorded' functionality Feb 2013 version 1.0

Leader Recorded         Select participant         Add timescales         Add programme plans         Approve sections         Manage groups	LO: Centre: Group: Status:	Windsor I WK Service Bronze G Active			User ID nu	detai mber: name:	ls		0			
Manage adults Manage centre News								Search				
Resources	ID	<u>First name</u>	<u>Surname</u>	Group		<u>Level</u>	Volunteering	Physical	Skills	Expedition	Residential	Log in
Reporting My settings	71986	not	real101	Bronze Grou	p 1			,	Award complete	юd		<b>~~~</b>
	<u>137926</u>	Not	real130	Bronze Grou	p 1			,	Award complete	ed.		<b>~</b>
ceop.police.uk	235273	not	real13	Bronze Grou	p 1		01/01/2010	01/01/2010	01/01/2010	View	01/01/2011	<b>~~~</b>
	241367	not	real57	Bronze Grou	p 1		01/04/2010	X	X	View	X	<b>~~</b>
	<u>137926</u>	Not	real130	Bronze Grou	p 1		01/01/2011	X	X	<mark>_≥</mark> <u>View</u>	X	<b>~~</b>

Use the 'Key' symbols on the far right to sign in to the individual's eDofE account as above. The same conditions apply.

**Add timescales** – You may have several participants in your group who are at the same point in their DofE programme and have chosen the same timescales. You can select the timescales for multiple participants instead of going in to each account separately, to save you time.

Select the level and timescales and click on 'Continue'.



Use the filter to select the relevant participants. Remember if an individual or group isn't tagged then the participants will not show up in the list. Tick the participants and click 'Apply'.

#### eDofE LEADERS guide to 'Leader Recorded' functionality Feb 2013 version 1.0

	e selected Bronzo	e Award and 6,	3, 3 timescales			
ocatior	ı	۲	Subgroups	0		
egion:	Training	-	(Please select)			
D:	Windsor Head O	ffice 💌				
entre:	UK Services Tea	m 🔻	User details	•		
roup:	Bronze Group 1	<b>•</b>	ID number:			
tatus:	Active	- 2	First name:			
cacus.	Active		Surname:			
			Sea	irch		
ID	<u>First name</u>	<u>Surname</u>	<u>Group</u>	Irch Level	Direct/ Indirect	Select all
ID 24136		Surname real57			Direct/ Indirect Direct	
	z not		Group			

The system will confirm the timescales have been added to the participant's account.

Suco	ess!	×
~	The timescales have been set for the selected participants.	
	ок	

**Add programme plans** – You may have several participants in a group who plan to undertake a group activity for a section, or choose the same activity. The 'Add programme plans' function enables you to add the details to one sectional programme planner and allocate it to multiple participants. This will save time by avoiding having to retype the same information into each account separately.

**Top tip:** first check the level enrolment dates of each participant because you may want to start their section on the same date as their enrolment.

Select the section and complete the programme planner fields.

Choixed 0 🔜 Test Name	Add Programme Plans	Communications
ID:121	Fill in the details of the section here, then you will be able to select th changes will set the status of the section to 'Programme Planner Appro participantswho have submitted or comleted their section	
DofE information	Physical details	
Participation Places	* Section Start date:	
Manage participants	* Type/category of activity: Please select	
🔞 Leader Recorded	Please select	
Select participant	* Detailed activity chosen:	2
Add timescales	* Where are you going to do it?	A 2
Add programme plans		-
Volunteering		*
Physical Skills		
Expedition	* What are your goals? What do you want to achieve?	
Residential	,	
Approve sections		Ŧ
😂 Manage groups	* Who is going to assess you	?
🚻 Manage adults	(Name)?	
👩 Manage centre	* What position do they hold?	2
News	Assessor's email:	2
📔 Resources		
<u>î</u> Keep safe	Assessor's telephone no:	
Reporting		Continue
🗽 My settings		Commu

Complete the filters to show the available participants.

Location	ı	۲	Subgroups 🔘	Levels
Region:	Training		(Please select)	Bronze
LO:	Windsor Head Office 💌			Silver
Centre:	UK Services Team		User details	
Group:	Bronze Group 1		ID number:	Gold
Group:	Bronze Group 1 💌		First name:	
Status:	Active	2	Surname:	

Select the relevant participants and click 'Apply'. Remember if an individual or group isn't tagged for 'Leader Recorded' or the section start date you entered is too early, the participants won't appear in the list.

ID	<u>First name</u>	<u>Surname</u>	Group	<u>Level</u>	Select all
<u>241367</u>	not	real57	Bronze Group 1		
<u>425036</u>	not	real144	Bronze Group 1		
Go Bac		Арріу			

Approve the action and then the system will confirm the action.

Are	you sure? X			
A	Are you sure you want to record and approve the programme plan for the selected participants?			
		Suc	cess!	×
	Yes No	~	The Skills section programme planner have been recorded and approved for the selected 2 cases.	

Add programme plans to Expedition section – Leaders are able to add most of the information required in a participant's Expedition section using 'Expedition set up' under 'Manage participants', however participants are still expected to add their own Qualifying expedition Aim and goals. This functionality allows Leaders with 'Leader Recorded' permissions to add these elements on behalf of tagged participants.

Add Programme Plan:	s	<u>Communications</u>
Leader Recorded perm	ne participants qualifying expedition Aim and Goals for m issions at the same time. Use 'Expedition set up' under ' xpedition section, including the Qualifying Expedition. Th	'Manage participants' above for
* Aims:		$\oslash$
* Goals:		
		Continue

**Approve sections –** As a Leader with a 'Leader Recorded' group, you may have entered the same sectional details into the accounts of several participants. This functionality enables you to you choose to mass approve selected sections from one screen rather than manually having to go into each participant's account to approve them. **Note**: this works in the same way as the 'directly approve' function where you can approve sections even if they are draft/just submitted etc. providing the programme plan and Assessor's report are in place and the minimum timescales have been reached.

Select the filter to find the relevant participants. Remember if an individual or group isn't tagged, then the participants won't appear on the list. Tick the relevant sections and click 'Approve'.

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chelson 0 Test Name	Approve	Sections								<u>Communi</u>	<u>cations</u>
ID:121	Here you	can mass a	pprove ar	y section where	all of	the r	equirements l	nave been me	t for multiple	participants	at the same
View/edit my profile	time. Sele	ect the loca	tion and t	the section(s) yo	u wisł	h to a	pprove and t	he press 'App	rove'.		
	Location	n		۲	Subg	rouns		0	]		
DofE information	Region:	Training		•		ise se		-			
Participation Places	LO:				(1100	00 00					
Manage participants	LO:	Windsor H	lead Offic		User		-		1		
Leader Recorded	Centre:	UK Servic	es Team	-	ID nur		15	©			
Select participant	Group:	Bronze Gr	oup 1	-	First r						
Add timescales	Status:	Active									
Add programme plans					Surna	me:					
Approve sections				_							
Manage groups								Search	J		
Manage adults							Volunteering	Physical	Skills	Expedition	Residential
Manage centre	ID	<u>First name</u>	<u>Surname</u>	Group		<u>Level</u>	Select all	Select all	Select all	Select all	Select all
News									Ì	Ì	
Resources	287837	Irene	Oliver	Bronze Group 1					n/a	n/a	n/a
<u>î</u> Keep safe											
Reporting								n/a	Not started	n/a	n/a
My settings	282077	not	real118	Bronze Group 1			V		Not started		11/ 0
🔁 Help											
	235273	not	real13	Bronze Group 1			$\checkmark$	<b>~</b>	<b>~</b>	<b>~</b>	<b>~</b>
ceop.police.uk	428615	not	real145	Bronze Group 1				PP submitted	PP submitted	n/a	n/a
	420015	100	1691143	bronze Group 1							
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	547087	not	real152	Bronze Group 1				Not started	Not started	<b>~</b>	n/a

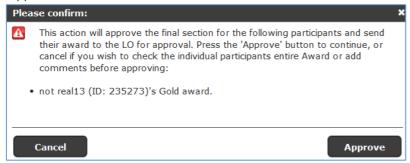
## Confirm the action

se confirm:	×
Are you sure you want to approve all the selected Sections?	
Cancel Approve	

The system will summarise all the section approvals in this grid below. If the system indicates a 'failed' section, then place your cursor over the number and it will inform you why it failed.

Success! X							
✓	Section	Total Selected	Total Approved	Directly Approved	Total Failed		
	Volunteering	1	0	1	0		
	Physical	0	0	0	0		
	Skills	0	0	0	0		
	Expedition	0	0	0	0		
	Residential	0	0	0	0		
ок							

If the section is the last one to be approved then this warning appears, you will need to select 'Approve' or 'Cancel'.



# Troubleshooting

# What do you mean when you say that the 'Leader Recorded' functionality is only available to participants with additional needs or whose usage of eDofE is affected by a particular cultural factor?

The DofE works with a huge range of participants, from a variety of backgrounds and is committed to making its programme available to all young people. Those with additional mental or physical needs may not be able to fully utilise eDofE. Other young people may be prevented from using eDofE if they are from a community who do not wish to use the internet or other technology. The 'Leader Recorded' functionality in eDofE has been developed to ensure that young people from these groups are able to engage with a DofE programme. The decision on whether or not to grant access to the 'Leader Recorded' functionality is made by the relevant DofE Regional Office based on specific local / individual circumstances.

## After selecting the filters none of my participants have shown up in the list, why?

This is because either the participant was not tagged or the group was not tagged. Contact your LO Manager first to find out if the application to switch on the 'Leader Recorded' tag was approved and actioned.

## Why can't I see the 'Leader Recorded' functionality?

This functionality is restricted to those who might need it. Regions make LOs aware of its existence so that they can propose groups who might require it.

# What happens if I move a participant into a tagged group?

They will automatically become a 'Leader Recorded' participant as the permission goes with the group.

# What happens if I move a participant out of a tagged group into another group without 'Leader Recorded' permission?

They will automatically retain the 'Leader Recorded' permission until it is specifically removed by a designated Regional user. However, unless an adult connected to their new group has the 'Leader Recorded' functionality they will not be able to access it. This same logic works when a participant moves from one LO to another LO or centre to centre.

**Top Tip**: Inform the new Leader of the participant that their account is 'tagged' or ask the participant to remind their new Leader as they will need the permission to access the functionality.

### Can the participant still access their own account?

Yes – if they have the username and password. The participant may wish to see their progress or use some of the functionality, for example with help from a parent.