



# Diocese of Guildford Education Services Portal Foundation Admin Guide

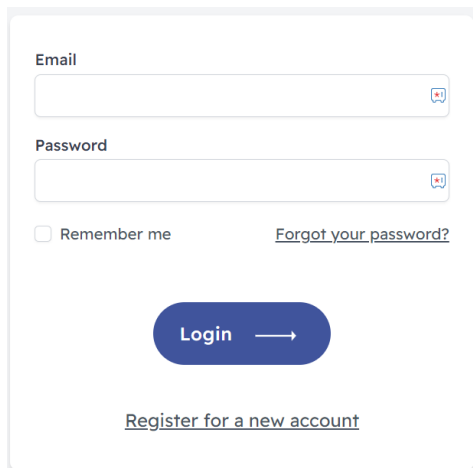
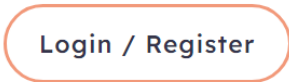
V2.2

# Finding the Education Services Portal

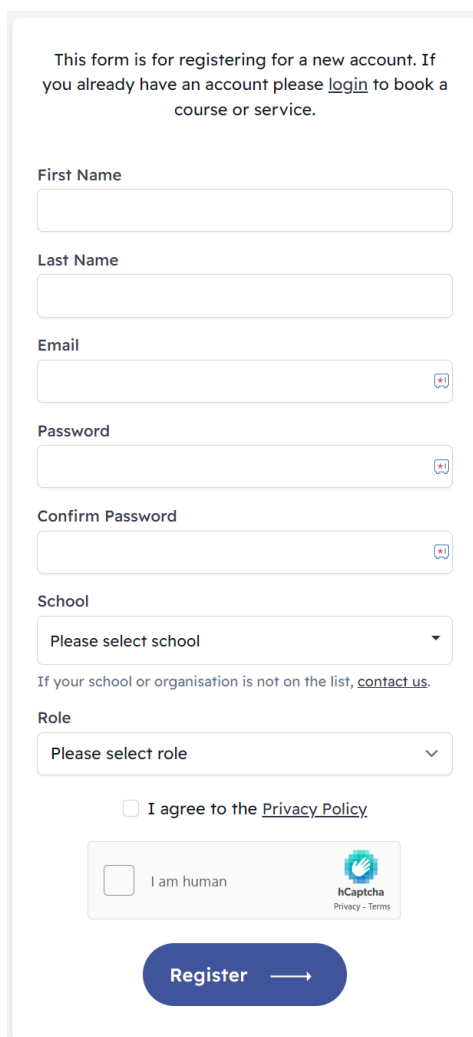
Go to <https://gdbe-elevate.org>

## Registering

To register as a new user to site click on the login / register button in the top right-hand corner of the page:

A login form with two input fields: "Email" and "Password". Below the password field is a checkbox for "Remember me" and a link for "Forgot your password?". A blue "Login" button with a right-pointing arrow is centered below the fields. At the bottom, there is a link for "Register for a new account".

Under the login form, click on the **'Register for a new account'** link.

A registration form with a heading: "This form is for registering for a new account. If you already have an account please [login](#) to book a course or service." The form includes input fields for "First Name", "Last Name", "Email", "Password", and "Confirm Password". There are two dropdown menus: "School" (with "Please select school" as the placeholder) and "Role" (with "Please select role" as the placeholder). Below the dropdowns is a checkbox for "I agree to the [Privacy Policy](#)". At the bottom, there is a checkbox for "I am human" next to an hCaptcha logo and a blue "Register" button with a right-pointing arrow.

Fill out the Registration form.

If your school or organisation is not on the listed use the contact us link and let us know.

Once complete click the Register button.

You will receive an email to verify your account. Click on the link within the email.

Your school will be informed that you have registered.

## Logging in for the first time

You need an email and password to log in to the site.

If you have been registered by The Diocese of Guildford or your school you will have received a verification email. You will need to click on the link within this email in order to verify your email address and request a password before you can log in.

### Didn't get the email?

Check your spam folder to make sure it didn't end up there.

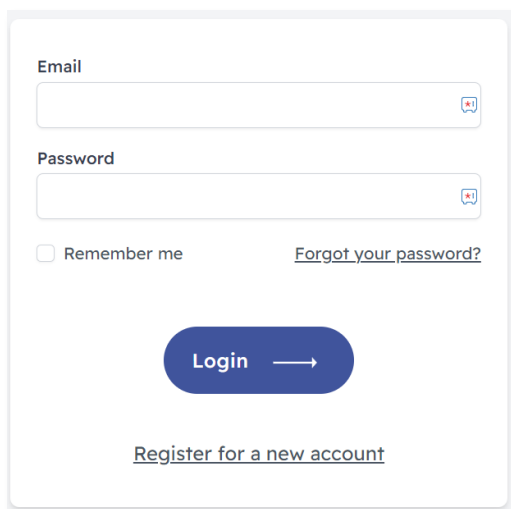
You can also visit the following page to resend the verification email:

<https://gdb-elevate.org/forgot-password>

## Logging in

In the top right-hand corner of the page click on the login / register button.

Login / Register



The screenshot shows a login form with the following elements:

- An "Email" input field with a red asterisk icon on the right.
- A "Password" input field with a red asterisk icon on the right.
- A checkbox labeled "Remember me" and a link labeled "Forgot your password?".
- A blue "Login" button with a right-pointing arrow.
- A link at the bottom labeled "Register for a new account".

Enter your email and password and click Login

*Some users have a username to access their account. Enter this username in the email field.*

If you would like to use the same email for multiple accounts, e.g a Foundation account and a School account, please contact us and we will provide usernames for your accounts.

Upon successfully logging in, the login / register button will be replaced by the **Account** button.

Account ▾

Clicking on the Account button will show further links, including **My Account** showing your bookings, **Profile** to change your email and password and **Logout** to logout of the system.

Users with other permissions may have further links.

# Federation Account

To access your Federation account, click on **Account** button in the top right-hand corner of the homepage and then click on the **Federation Account** link.

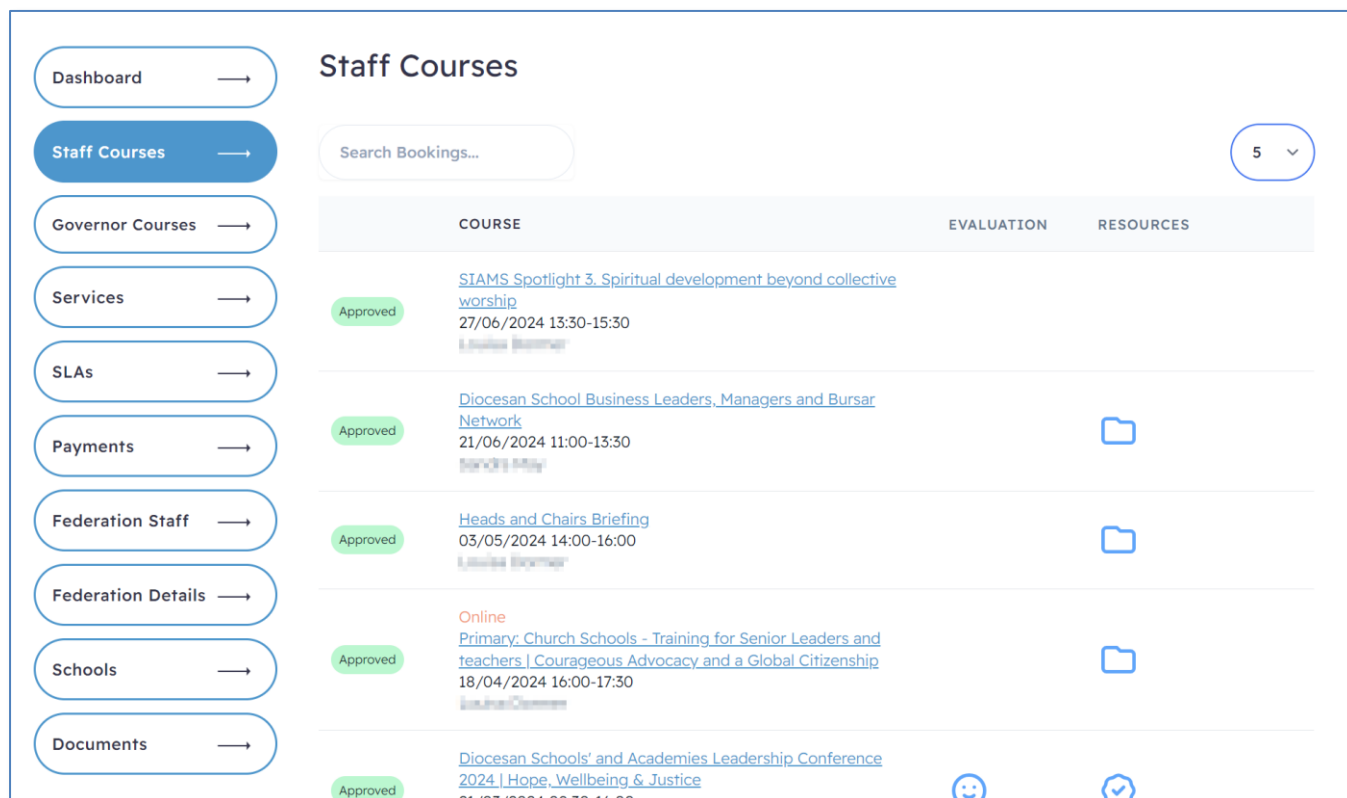
The screenshot shows the Federation Account dashboard. At the top, there is a dark blue header with the text 'Federation Account' on the left and 'Home | Federation Account' on the right. Below the header, the main content area is white. On the left side, there is a vertical navigation menu with ten items, each in a rounded rectangle with a right-pointing arrow: 'Dashboard', 'Staff Courses', 'Governor Courses', 'Services', 'SLAs', 'Payments', 'Federation Staff', 'Federation Details', 'Schools', and 'Documents'. The 'Dashboard' item is highlighted in blue. To the right of the navigation menu, the main content area is titled 'Dashboard' and contains a 'Contacts' section with the text 'No attached consultant. See [Our People](#) for further contact information.' On the far right, there is a purple button labeled 'Request Services | →'. Below the 'Request Services' button, there is a light orange box containing 'Booking Notifications' information. This box includes a green checkmark icon next to 'Receive Notifications', a section titled 'Automatic System Approval Option - applies only to £00.00 zero rated fee course, session or briefing.' with explanatory text, and another green checkmark icon next to 'Allow Automatic Admin Approval'.

The Dashboard allows you to access your Federation information.






On the right you have options to request additional services and manage Booking Notifications.

## Staff and Governor Courses

All courses that have been booked will show under Courses.



The screenshot shows a web interface for 'Staff Courses'. On the left is a navigation menu with buttons for Dashboard, Staff Courses (highlighted), Governor Courses, Services, SLAs, Payments, Federation Staff, Federation Details, Schools, and Documents. The main area is titled 'Staff Courses' and includes a search bar labeled 'Search Bookings...'. A dropdown menu in the top right shows the number '5'. Below is a table with columns 'COURSE', 'EVALUATION', and 'RESOURCES'. The table lists five approved bookings with their respective dates, times, and resource icons.

	COURSE	EVALUATION	RESOURCES
Approved	<a href="#">SIAMS Spotlight 3. Spiritual development beyond collective worship</a> 27/06/2024 13:30-15:30 Louise Brommer		
Approved	<a href="#">Diocesan School Business Leaders, Managers and Bursar Network</a> 21/06/2024 11:00-13:30 Sarah May		
Approved	<a href="#">Heads and Chairs Briefing</a> 03/05/2024 14:00-16:00 Louise Brommer		
Approved	Online <a href="#">Primary Church Schools - Training for Senior Leaders and teachers   Courageous Advocacy and a Global Citizenship</a> 18/04/2024 16:00-17:30 Louise Brommer		
Approved	<a href="#">Diocesan Schools' and Academies Leadership Conference 2024   Hope, Wellbeing &amp; Justice</a> 21/07/2024 08:30-16:00		

Course bookings can either be Pending (waiting for approval), Approved or Rejected. Course bookings can also be held on a waiting list if the course is full. You are able to delete bookings that have yet to be approved.

The Federation account can be set up in two ways:

- allow academies to approve and managed their staff bookings
- only allow the Federation can manage bookings.

*Please contact GDBE to discuss these options.*

If the Federation is set to manage bookings, when a member of staff from a Federation school makes a booking, you will receive an email requesting approval.

The bookings list will indicate when a booking requires your approval.

If your schools are allowed to manage bookings, you will still be able to view these bookings and approve any pending bookings if required.

### To approve a booking



Click the icon to approve a booking.  
A popup confirmation window will open. Click 'Yes'.

### To delete a booking

If a course booking has yet to be approved by GDBE, it can be deleted without penalty.



Click the icon to delete a booking.  
A popup confirmation window will open. Click 'Yes'.

Additionally, a course booking may also have links to resource files, an evaluation and a completion certificate. These resources are usually only available after the course has finished.



Click on the icon to open the **course evaluation** form popup.  
When the evaluation is completed the icon is green.



Click on the icon to open the **course resources** popup.  
Not all courses have resources. Some resources are available before the course.



Click on the icon to download your **course certificate**.

To book a course for yourself or on behalf of a member of staff, see the **Course Bookings** section.

## Service Requests

Service Requests can either be Pending (waiting for approval), Approved or Rejected.

	SERVICE	NOTES
Confirmed	<a href="#">GDBE Partner Bundle / Governance - NGA Standard Membership</a> Confirmed: 01-11-2023 Clara Goodfuge	Notes: 104 Bundle (Included) - cost
Confirmed	<a href="#">GDBE Partner Bundle / Governance - NGA Standard Membership</a> Confirmed: 01-11-2023 Clara Goodfuge	Notes: 104 Bundle (Included) - cost
Confirmed	<a href="#">GDBE Partner Bundle / Governance - NGA Standard Membership</a> Confirmed: 01-11-2023 Clara Goodfuge	Notes: 104 Bundle
Confirmed	<a href="#">GDBE Partner Bundle / Governance - NGA Standard Membership</a> Confirmed: 01-11-2023 Clara Goodfuge	Notes: 104 Bundle
Confirmed	<a href="#">GDBE Partner Bundle / Governance - NGA Standard Membership</a> Confirmed: 01-11-2023 Clara Goodfuge	Notes: 104 Bundle (Included) - cost

The Federation account can be set up in two ways:

- allow academies to approve and managed their staff service requests
- only allow the Federation can service requests.

*Please contact GDBE to discuss these options.*

If the Federation is set to manage service requests, when a member of staff from a Federation school makes a booking, you will receive an email requesting approval.

The service request list will indicate when a request requires your approval.

If your schools are allowed to manage bookings, you will still be able to view these bookings and approve any pending bookings if required.

### To approve a service request



Click the icon to approve a service request.  
A popup confirmation window will open. Click 'Yes'.

### To delete a service request

If a service request has yet to be approved by GDBE, it can be deleted without penalty.



Click the icon to delete a booking.  
A popup confirmation window will open. Click 'Yes'.

To make a service request, see the **Requesting Services** section.

# SLAs

The SLA tab lists your Service Level Agreements.

	SLA	YEAR	
Pending	CORE Support - GDBE elevate CORE	2023-24	
Approved	EsLA - EsLA Enhance	2020-21	
Approved	EsLA - EsLA Enhance	2019-20	



When an SLA request has been approved you can download the contract using the contract icon.



SLA requests that have yet to be approved by GDBE can still be amended or deleted.

To request an SLA, see the section on **Requesting a Service Level Agreement**



# Payments

After a booking or request has been approved you will receive an email requesting payment. This email will include a link to the invoice.

The screenshot displays the 'Payments' section of a web application. On the left is a sidebar with navigation buttons: Dashboard, Staff Courses, Governor Courses, Services, SLAs, Payments (highlighted), Federation Staff, Federation Details, and Documents. The main content area is titled 'Payments' and features a search bar labeled 'Search Bookings...' and a dropdown menu showing '10'. Below this is a table with the following data:

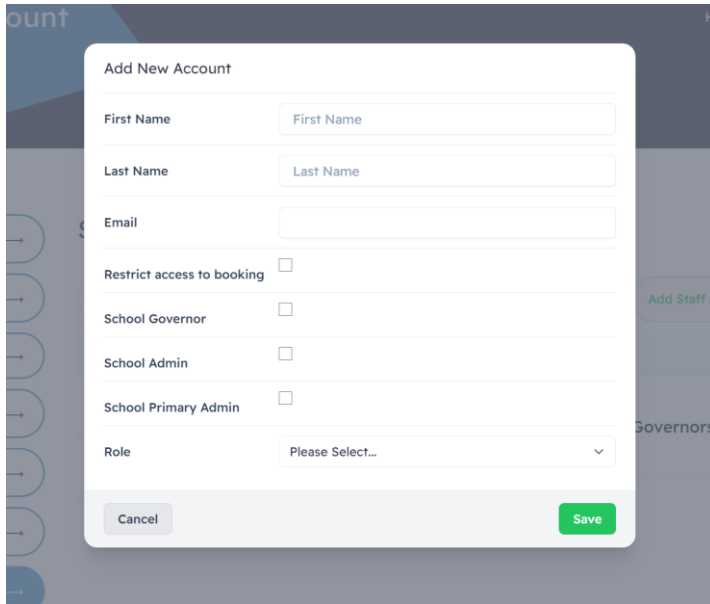
	INVOICE	DATE	TYPE
Paid	<a href="#">22-C04347</a>	March 18, 2022	Course

The Payments tab will show a list of payments and credits. Payments can either be Pending (waiting for payment) or Received. Clicking on the invoice number allows you to download the invoice.



## Add a User

To add a User, click on the **Add Staff Account** button.



The screenshot shows a modal window titled "Add New Account" with the following fields and options:

- First Name:
- Last Name:
- Email:
- Restrict access to booking:
- School Governor:
- School Admin:
- School Primary Admin:
- Role:
- Buttons: "Cancel" (grey) and "Save" (green)

- |                             |  |
|-----------------------------|--|
| E-mail address              | The e-mail address must be unique.<br>The reason for this is that the e-mail address is used to login to the system.   |
| Restrict Access to bookings | Tick this box to prevent the staff member from bookings courses or services on the portal  |
| School Governor             | Tick this box if the user is a school governor   |
| School admin                | Tick this box if you would like the user to have similar school admin rights to yourself   |
| Primary School admin        | Tick this box if you would like the user to be the primary school admin. Only one person in a school has this role. They will receive all the email notifications. |

## Edit a User



Click the icon to edit a User.

## Delete a User



Click the icon to delete a User.  
A popup confirm box will appear. Click the delete button to remove the User.  
Deleting a User will not remove the user's bookings.

# School Accounts

Federations can view and manage the details of their schools as well as the school staff.

SCHOOL	STAFF ACCOUNTS	
+ Ashley CofE (Aided) Primary School (2017)	13	
+ Clon's College (Aided) (2017)	4	
+ Farnborough Grange Community School (2017)	4	
+ Holme (Free) CofE (Controlled) Primary School (2017)	31	
+ Ormskirk CofE (Controlled) Infant & Junior Schools (2017)	15	
+ Potters Gate CofE (Controlled) Primary School (2017)	18	
+ Queen Eleanor's CofE (Aided) Junior School (2017)	15	
+ St Andrew's CofE (Controlled) Infant School (2017)	8	



Clicking on the green pencil icon brings up an editing box for the school.

Management Learning Trust

No of Staff

Number on Roll

Telephone

Email

CEO

Deputy

Admin/Bursar

Clicking on the plus icon next to the school's name, shows the staff user accounts.

The screenshot shows a web interface with a sidebar on the left containing navigation buttons: Dashboard, Staff Courses, Governor Courses, Services, SLAs, Payments, Federation Staff, Federation Details, Schools (highlighted), and Documents. The main content area is titled 'Schools' and contains two tables. The first table, 'SCHOOL', lists schools with columns for school name, a plus icon, a minus icon, a count of staff accounts, and a green edit icon. The second table, 'USER', lists individual users with columns for user name, role, a green user icon, and a red delete icon.

SCHOOL	STAFF ACCOUNTS	
+ Ashley CofE (Aided) Primary School (2021)	13	
- Christ's College (Aided) (2021)	4	

USER	ROLE	
Jr Franklin		
Laura Morgan	Admin	
Sarah March	Primary Admin	
Sarah March	Admin	

+ Farnborough Grange Community School (2021) 4



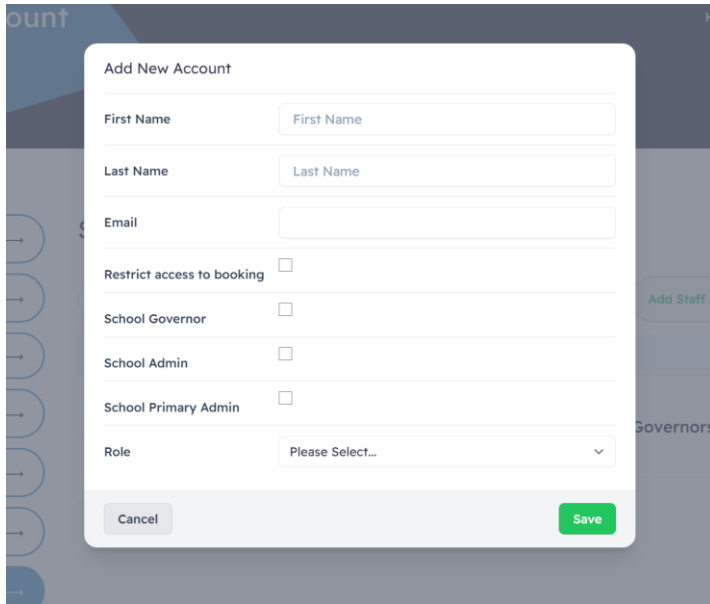
Clicking on the green user icon allows you to edit the users account information.



Clicking on the red icon deletes the user account.

## Add a School User

To add a User, click on the **Add Staff Account** button.



E-mail address	The e-mail address must be unique. The reason for this is that the e-mail address is used to login to the system.
Restrict Access to bookings	Tick this box to prevent the staff member from bookings courses or services on the portal
School Governor	Tick this box if the user is a school governor
School admin	Tick this box if you would like the user to have similar school admin rights to yourself
Primary School admin	Tick this box if you would like the user to be the primary school admin. Only one person in a school has this role. They will receive all the email notifications.

## Edit a User



Click the icon to edit a User.

## Delete a User



Click the icon to delete a User.  
A popup confirm box will appear. Click the delete button to remove the User.  
Deleting a User will not remove the user's bookings.

# Federation Information

This shows the school information help by the portal.

Dashboard →

Staff Courses →

Governor Courses →

Services →

SLAs →

Payments →

Federation Staff →

**Federation Details →**

Schools →

Documents →

## Federation Details Edit →

Name	Harrow Schools Federation
Account Number	
Type	Federation
Funding	Academy Trust
No of Staff	0
Number on Roll	000
Address	Harrow Schools Federation, 1, 2-Harrow CE Infant School, Kingsbury Lane, Kingsbury, Bucks, MK48 1JA
Telephone	01494 342000
Diocese	Kingsbury
Local Authority	Bucks
Email	admin@harrow-schools-federation.school
CEO	Louisa Dormer

Click the Edit button to update the information. Click the same button to then save any changes.

# Documents

The portal hosts a large number of documents. These documents support SLAs and Services. Some documents will be accessible to any registered user. Other documents will only be available to schools who have purchased a particular SLA or Service.

The screenshot shows a web interface for a 'Documents' portal. On the left is a vertical navigation menu with buttons for: Dashboard, Staff Courses, Governor Courses, Services, SLAs, Payments, Federation Staff, Federation Details, Schools, and Documents (which is highlighted in blue). The main content area is titled 'Documents' and is split into two columns. The left column is titled 'Folders' and lists several categories with expand/collapse icons: Help Guides (+), GDBE Consultancy (+), Headteacher Appraisal Performance Management (+), People Resources Library (+), GDBE elevate People E-News (+), and RE Resource Library (-). Under 'RE Resource Library', there are sub-folders: Primary Unit Plans and Support Materials, EYFS Materials, Key Stage One Materials (highlighted in blue), Lower Key Stage Two Materials, Upper Key Stage Two Materials, EYFS in the Revised Syllabus, Concept Maps for the Faith and Beliefs in the RE Syllabus, Resources to support teachers, Materials for School Leaders, Governors Meeting Materials Summer 2023, Staff Meeting Materials Summer 2023, and Curriculum Overview. The right column is titled 'Documents' and shows a preview of a document titled 'Key Stage One Materials' (PDF 241KB). Below this are three document thumbnails for 'CHRISTIANITY Year 1: Why do Christians call God 'creator'?': 'CHRISTIANITY Year 1: Why do Christians call God 'creator?' (PDF 432KB), 'In the beginning - story for session 2 (PDF 152KB), and 'In the beginning PowerPoint (PPTX 2534KB). At the bottom, another document thumbnail is visible for 'CHRISTIANITY Year 1: What is the 'Nativity' and why is it important to Christians?'.

To view files, click on the folder title in the left-hand column. The files within that folder will then show within the right-hand column. Click on the filename to download the file.



## Booking Courses

To book a course on behalf of a member of staff, the staff member must have an account. (See sections on Staff and Schools to register a user).

Use the site menu to find the course you wish to book.

When booking a course or service you will have the option of selecting the member of staff the booking is for.

Staff members are organized by school. You can search for a staff member using the search box at the top of the participant list.

### Primary: Church Schools - Training for New RE Subject Leaders

**Delivery**  
This training will be held face to face

**Intended Audience**  
Teachers new to the role of RE subject leader in a Church of England primary school. It is also relevant for teachers who have held the RE subject leader role previously in a community school.

**This training will help you to:**

- understand the role as RE subject leader in a Church school
- understand which RE syllabus or guidelines you should be using and how they fit with the Church of England Statement of Entitlement for RE in Church schools
- appreciate the 'bigger picture' of RE;
- understand what makes RE a 'special' subject in a Church school

**Note - We strongly recommend that teachers new to the role of RE subject leader in a church school also attend the training**

**'Primary: Church Schools - Unpacking SIAMS Strand 7'.**

Teachers new to the role of RE subject leader in a Church of England primary school. It is also relevant for teachers who have held the RE subject leader role previously in a community school.

Standard Price
Universal
GDBE elevate CORE

Book Course | Tutors & Venue

Date  
16/05/2023 16:00-17:30

Who's attending the training?  
Select Participant

Select Participant

- Indigene Learning Trust
- Alison Morgan -
- Anthony Marsh - Director of RE
- Henry
- Ben Morris - Member
- Bryan Smith -
- David Mason - Trustee

I accept the [Booking Terms & Conditions](#)

**Request Course** →

After reading and agreeing to the **Terms and Conditions** click on the 'Accept Booking Terms' checkbox. Click on the **Request Course** button to submit the request.

The Diocese of Guildford will review your request and email you confirmation when approved.

You, the School Admin and the member of staff will receive emails about the booking.

## Requesting Services

To request additional services, either click the **Purchase** link in the main site menu or click the **Request Services** button in the Federation Account Dashboard.

**CORE Support (2023-24)**  
Add on buyback for 2023-24 SLA only

**CORE School (2024-25)**  
Pre-purchase buyback 2024-25 SLA only

CORE Support (2023-24) Valid 01-09-2023 - 31-08-2024

SLA Member – active subscription.

**Headteacher Appraisal**

+ HTAPM Standard	Member Price £ 505.00	Select Schools
+ HTAPM Comprehensive with mid-year review	Member Price £ 975.00	Select Schools

**Strategic Leadership | Recruitment**

+ Recruitment Support Package with DDE and Lead HR Officer	Member Price £ 1190.00	Select Schools
+ Recruitment Support Package with Diocesan Director of Education	Member Price £ 970.00	Select Schools

**People**

+ HR Consultant Advice and Guidance - 5 hour package	Member Price No charge	Select Schools
+ Coaching   Three session package	Member Price No charge	Select Schools
+ Strategic HR   Governance	Member Price No charge	Select Schools

**Summary**

Services	£ 0.00
Total	£ 0.00

excluding VAT

Anything else about the booking?

I accept the [Booking Terms & Conditions](#)

**Request Services** →

**Contact**

**Jane Whittingdale**  
Schools Services Manager  
jane.whittingdale@cofeguildford.org.uk  
t: 01483 484911

The Request Services page shows the services that can be requested for the current SLA. If the SLA for the following year has been published, these services will appear on a second tab.

Each tab will indicate if you are a member of that SLA. Prices will vary between SLA/Non-SLA, and some services will only be available if an SLA has been purchased.

Services are listed in sections.

You can read more detail on each service by click on the **+** next to the service title.



# Requesting a Service Level Agreement

To request an SLA, click on the **Services** link in the menu bar and select **Core Membership Trust**

## Our Service Offer

Our CORE support package provides an initial half-day of Education specific support, access to our strategic HR partner and a host of training benefits. If you need to allocate more time with us, we are on hand to discuss various choices for support to ensure we best meet needs and arrange timelines within the subscription period.

Our specialist Education and HR support 'bundles' are designed specifically to give you this flexibility to extend our support in school with your team. Through a bespoke programme of visits and agreed areas of focus, we will work with you to identify, plan and implement key priorities. Each one shaped to work in partnership to help you achieve better outcomes for your school and pupils.

We support with the self evaluation of leaders and provide professional challenge to enhance your thinking and planning. Specifically, but not exclusively, we engage in teaching and learning, self evaluation, validation and phase reviews as well as engaging you in professional dialogue to help solve problems and deliver initiatives.

Your GDBE elevate consultant is there to provide both challenge and support. All our consultants are educators themselves, highly experienced professionals with a track record of success.

### CORE Support 2022-23

- Dedicated GDBE elevate consultant
- Half-day support and guidance
- GDBE elevate support package 'bundle' options
- Strategic HR Guidance
- People Matters e-magazine: essential reading for HR
- Training and Development Benefits
- Practitioner Networks
- Governance training and e-learning

More Info →

In the Our Service Offer section, click on the **More Info** button. If the SLA for the following year is available this will show beside the current SLA box.

### GDBE elevate CORE

Our GDBE elevate CORE agreement is primarily designed to support CofE Church Schools, Single Academy Trusts and Multi-Academy Trusts, and Mixed Trusts with Church of England members within the Diocese of Guildford.

Each agreement comes with our GDBE elevate CORE support package. [Download our brochure](#) for full information about CORE support package buyback.

GDBE elevate CORE members benefit from price discounts on all GDBE elevate service and training.

#### Please note:

- You must be registered with us and logged into your account to order this agreement and additional support package 'bundles'.
- Our prices are quoted exclusive of VAT @20%.
- The agreement period is for one academic year.
- Renewal is automatic until you notify us of cancellation.
- Package bundle add ons are valid within the subscription period.
- Other terms and conditions may apply.

Small Schools	90 or less on roll	£595.00
Per School/Academy		£795.00

Request →

SLA pricing will be based on one or more factors such as pupil numbers, school type or status. The portal will automatically select the correct band.

Click on **Request** button to go to the SLA Request form.

# SLA Request Form

## CORE Membership Trust

### SLA Request

#### SLA

**GDBE elevate CORE** £ 1580

The SLA price is based on your Trust information: 1600 pupils / Academy Trust

If this is incorrect, please edit your [Trust information](#) (dropdown) prior to submitting this request.

If you know the packages your member academies require, add at the same time of SLA request.

#### Service Bundles

##### Christian Distinctiveness

+ Christian Distinctiveness   Activity 1 - Consultation Visit	Member Price £ 285.00	Select Schools
+ Christian Distinctiveness   Activity 2 - Staff Training	Member Price £ 215.00	Select Schools
+ Christian Distinctiveness   Activity 2 - Governor training	Member Price £ 215.00	Select Schools
+ Collective Worship   Activity 1 - Consultation Visit	Member Price £ 285.00	Select Schools
+ Collective Worship   Activity 2 - Staff Training	Member Price £ 205.00	Select Schools
+ Religious Education   Activity 1 - Consultation Visit	Member Price £ 285.00	Select Schools

### Summary

SLA	£ 1580
Bundles	£ 0.00
Total	£ 1580.00

excluding VAT

I accept the [Booking Terms & Conditions](#)

**Request SLA** →

### Contact

**Jane Whittingdale**  
Schools Services Manager  
jane.whittingdale@cofeguildford.org.uk  
t: 01483 484911

Click on the **Trust Information** link to correct any information used to calculate the cost of the SLA.

You have the option to select **Service Bundles** to accompany your SLA. To find out more about a bundle, click on the + next to the title.

## Assign services to schools

Click on the **Select School** box. A dropdown menu will appear with a list of your schools. Click on a school name to assign the service. Each service can be assigned to one or more school. To remove a school from the assigned list, click on the X at the end of their title.

Service Bundles		
Christian Distinctiveness		
+ Christian Distinctiveness   Activity 1 - Consultation Visit	Member Price £ 285.00	<div>Higher Learning Trust X</div> <div>St Peter's Catholic High School X</div>
+ Christian Distinctiveness   Activity 2 - Staff Training	Member Price £ 215.00	<div>Select Schools</div> <div>Search X</div>
+ Christian Distinctiveness   Activity 2 - Governor training	Member Price £ 215.00	<div>Higher Learning Trust</div> <div>St Peter's Catholic High School</div> <div>St Andrew's Catholic Primary</div> <div>St Martin's Catholic Primary School</div>
+ Collective Worship   Activity 1 - Consultation Visit	Member Price £ 285.00	
+ Collective Worship   Activity 2 - Staff Training	Member Price £ 205.00	<div>Select Schools</div>
+ Religious Education   Activity 1 - Consultation Visit	Member Price £ 285.00	<div>Select Schools</div>

The Bundles requested will be summarized in the right column.

After reading and agreeing to the **Terms and Conditions** click on the 'Accept Booking Terms' checkbox. Click on the **Request SLA** button to submit the request.

The Diocese of Guildford will review your request and email you confirmation when approved.

Prior to the SLA being approved, you will be able to return and edit the request. The request will be listed under the SLA tab in your Federation Account.