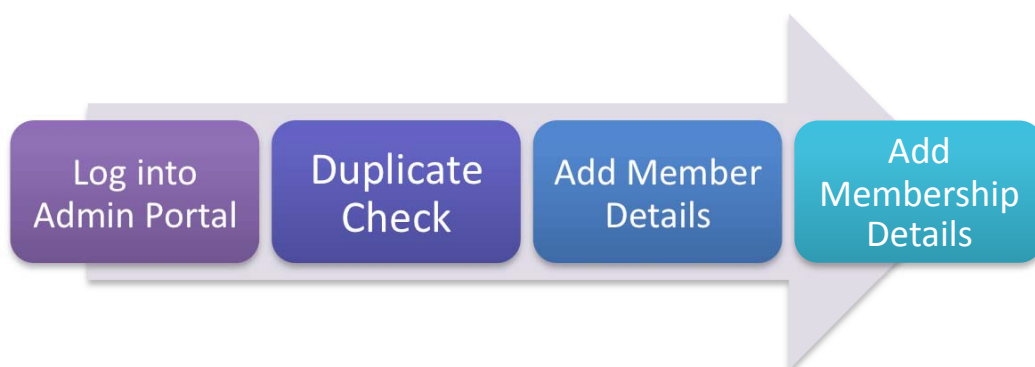


Entering New Members – For Association Administrators

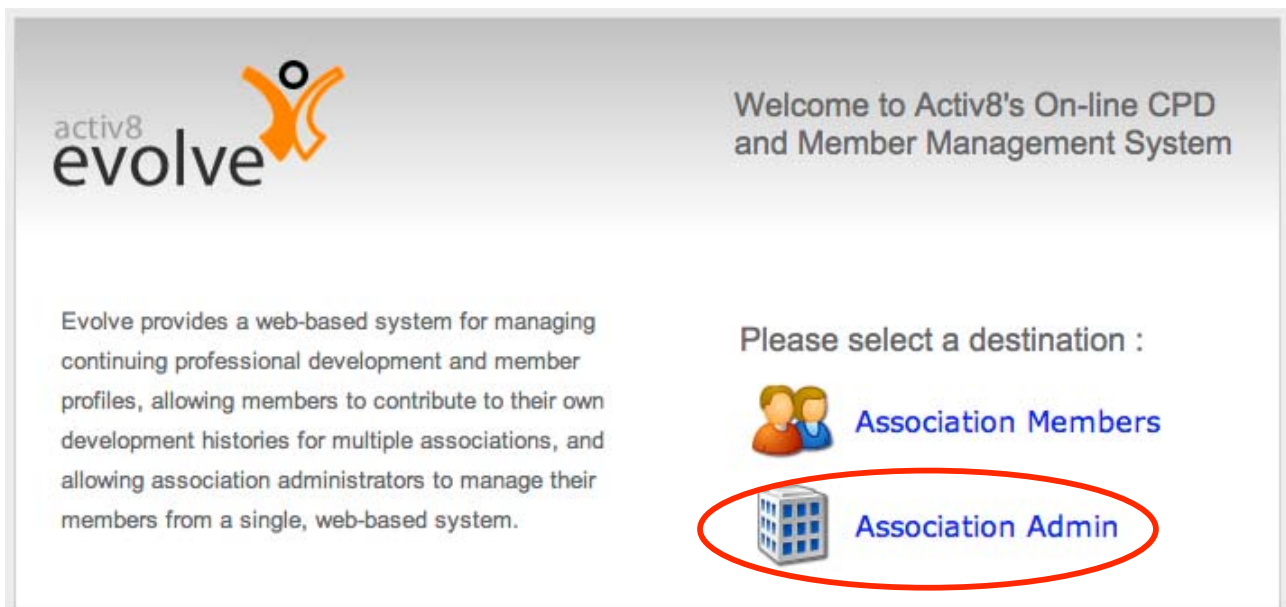
Introduction:

This guide walks you through the steps involved in entering a CPD event for a member, from the Administration portal of Evolve. We normally encourage associations to motivate their members to add their own CPD events, however you can add these from the admin side also.



Step 1: Log into Admin Portal

Visit www.activ8evolve.com and click on the Administration Admin link as highlighted below:



activ8 evolve

Welcome to Activ8's On-line CPD and Member Management System

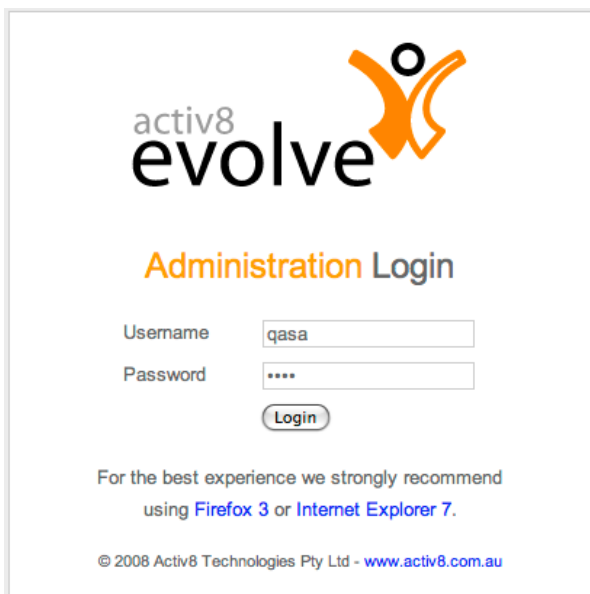
Evolve provides a web-based system for managing continuing professional development and member profiles, allowing members to contribute to their own development histories for multiple associations, and allowing association administrators to manage their members from a single, web-based system.

Please select a destination :

- Association Members
- Association Admin

Entering New Members – For Association Administrators

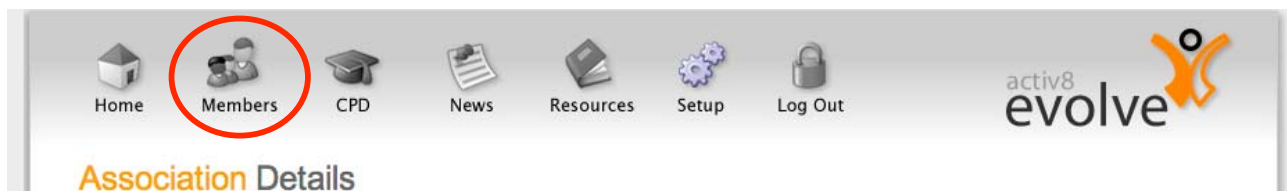
Enter your admin username and password:



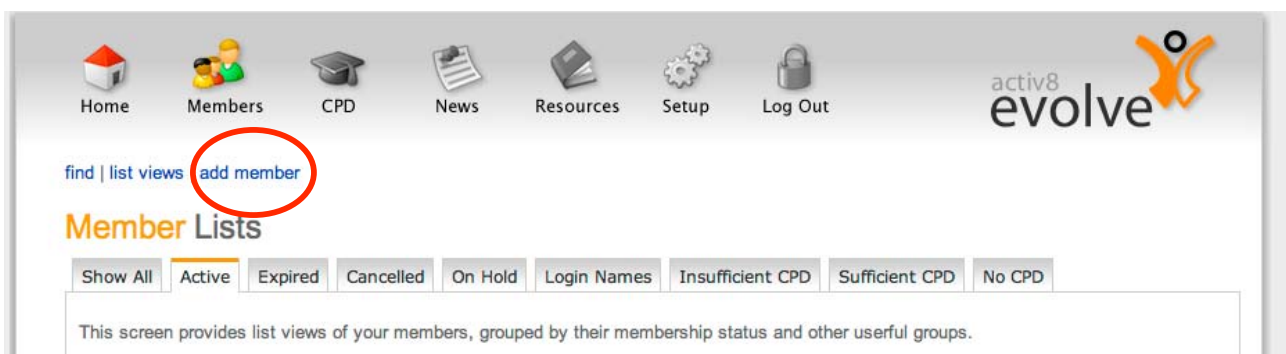
The screenshot shows the 'Administration Login' page for activ8 evolve. It features the logo at the top, followed by the title 'Administration Login'. Below this are two input fields: 'Username' with the text 'qasa' and 'Password' with four asterisks. A 'Login' button is positioned below the password field. At the bottom, there is a note: 'For the best experience we strongly recommend using Firefox 3 or Internet Explorer 7.' and a copyright notice: '© 2008 Activ8 Technologies Pty Ltd - www.activ8.com.au'.

Step 2: Duplicate Check

Click on the Members link to open the member listing screen



Click on the Add Member link at the top of the screen to start the add member wizard.



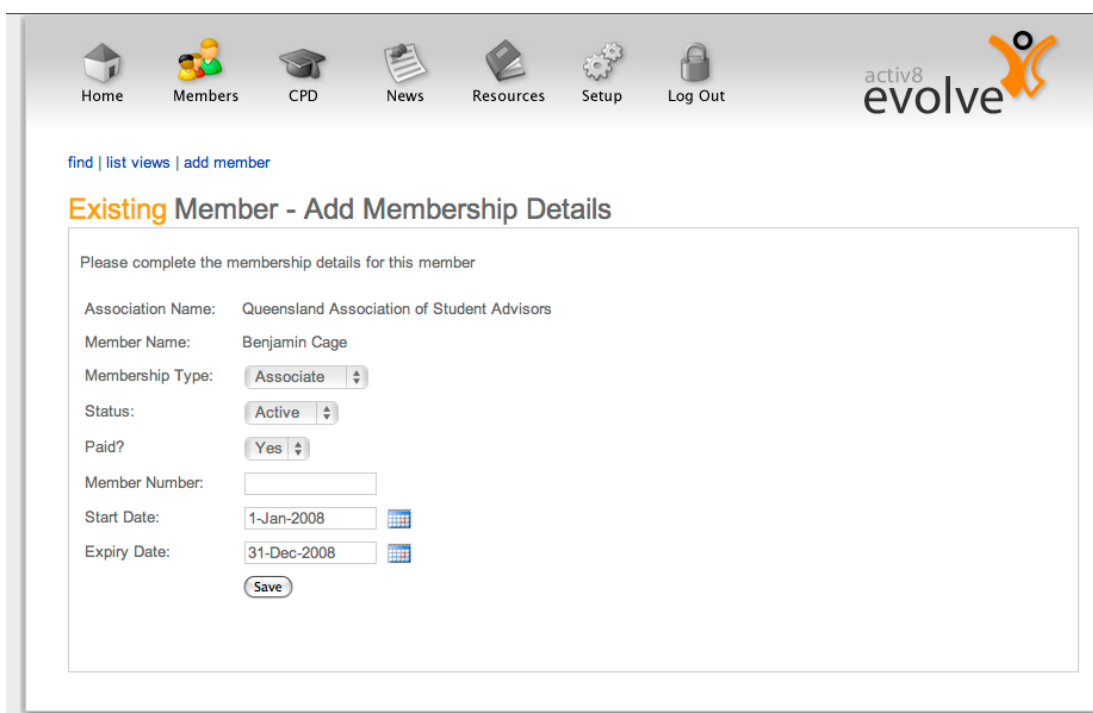
Entering New Members – For Association Administrators

The first step of creating a member profile is to check if their record already exists in the member database. They may be part of another association and already have a record in the system. In this case we wouldn't need to add them to the system, but rather just add their membership details with your association to the existing record. Enter their primary email address to start the check.



The screenshot shows the 'New Member - Step 1' form. At the top, there is a navigation bar with icons for Home, Members, CPD, News, Resources, Setup, and Log Out, along with the 'activ8 evolve' logo. Below the navigation bar, there are links for 'find | list views | add member'. The main heading is 'New Member - Step 1', with 'Step 1' selected and 'Step 2' visible. The instructions state: 'The first step is to enter the email address or the member you wish to add. This email address is used as the member's login username, and this step confirms they are not already registered on the system with another organisation.' There is a text input field for 'Email Address:' and a 'Lookup' button.

If the member already exists in the database you are able to just add the memberships details for your association, and attach them to the existing member profile as shown below. At this stage you can skip the rest of this guide as you are done!



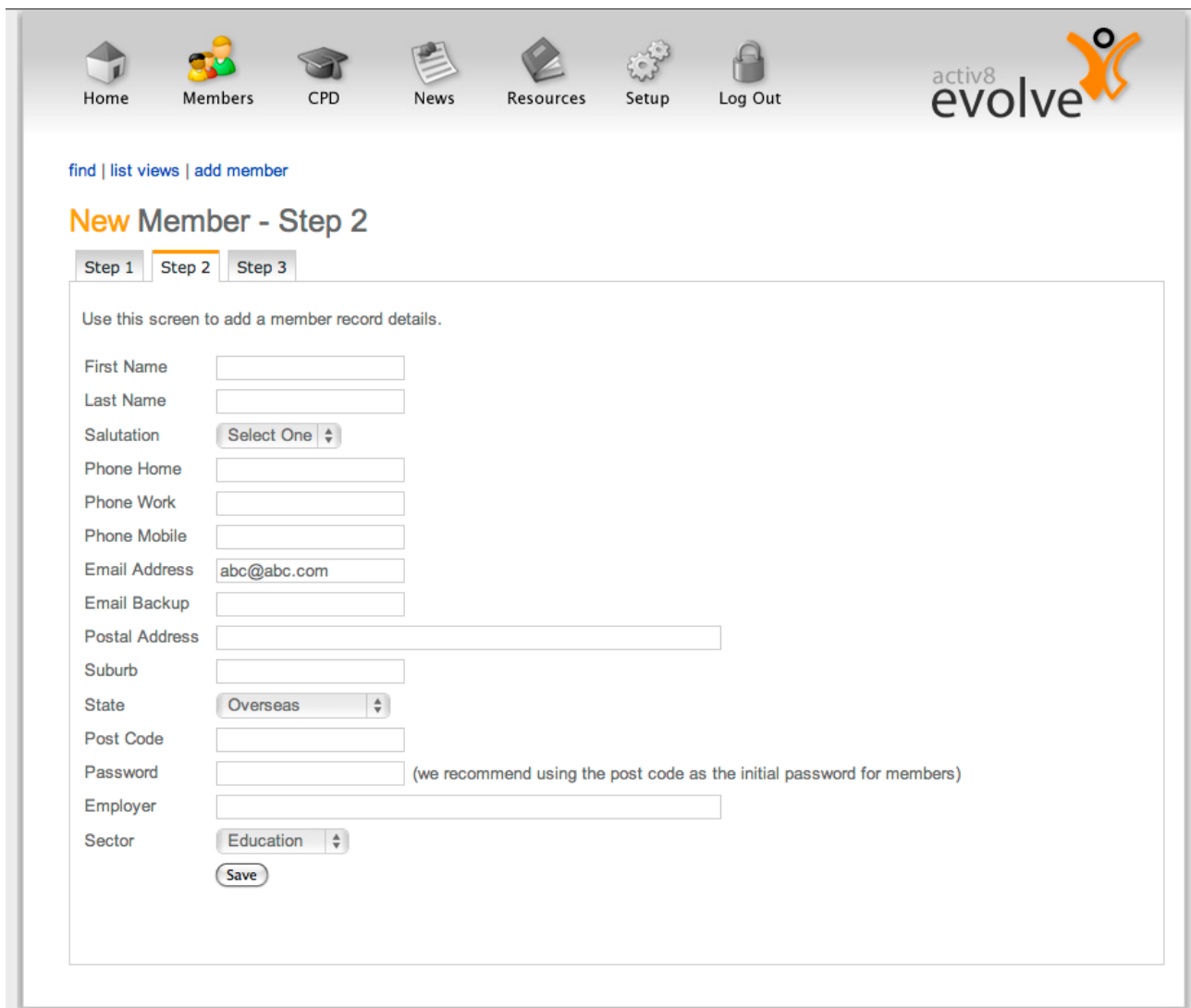
The screenshot shows the 'Existing Member - Add Membership Details' form. At the top, there is a navigation bar with icons for Home, Members, CPD, News, Resources, Setup, and Log Out, along with the 'activ8 evolve' logo. Below the navigation bar, there are links for 'find | list views | add member'. The main heading is 'Existing Member - Add Membership Details'. The instructions state: 'Please complete the membership details for this member'. The form contains the following fields: 'Association Name: Queensland Association of Student Advisors', 'Member Name: Benjamin Cage', 'Membership Type: Associate' (dropdown), 'Status: Active' (dropdown), 'Paid?: Yes' (dropdown), 'Member Number: [empty text box]', 'Start Date: 1-Jan-2008' (calendar icon), 'Expiry Date: 31-Dec-2008' (calendar icon), and a 'Save' button.

Entering New Members – For Association Administrators

Step 3: Add Member Details (if not already in system)

If the member is not already in the Evolve database you will be presented with the new member screen. Be sure to complete ALL the fields. As Evolve is a shared member system incomplete details only cause issues with potential duplicates.

When entering the password, we recommend you use a standard system for allocating these. For those records we import for you in bulk we usually use the “postcode” as the default password. The username is the primary email address also.



Home Members CPD News Resources Setup Log Out

activ8 evolve

[find](#) | [list views](#) | [add member](#)

New Member - Step 2

Step 1 Step 2 Step 3

Use this screen to add a member record details.

First Name

Last Name

Salutation

Phone Home

Phone Work

Phone Mobile

Email Address

Email Backup

Postal Address

Suburb

State

Post Code

Password (we recommend using the post code as the initial password for members)

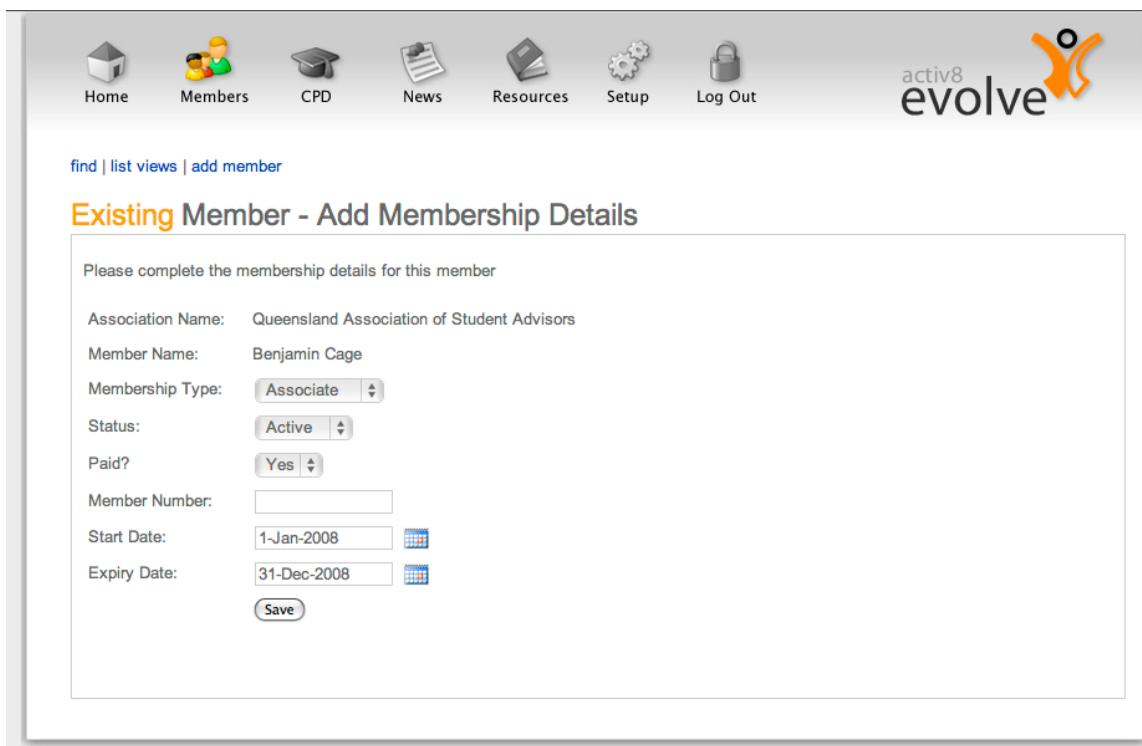
Employer

Sector

Entering New Members – For Association Administrators

Step 4: Add Membership Details

Now that you have entered the core member details you also have to attach your organisation's membership details. Evolve allows one member profile to have a number of memberships with various associations. Adding your association's membership details to their profile allows you to access their profile and monitor their CPD.



The screenshot shows the Evolve system interface. At the top, there is a navigation bar with icons for Home, Members, CPD, News, Resources, Setup, and Log Out. The Evolve logo is in the top right corner. Below the navigation bar, there are links for 'find', 'list views', and 'add member'. The main heading is 'Existing Member - Add Membership Details'. Below this, there is a form with the following fields:

- Association Name: Queensland Association of Student Advisors
- Member Name: Benjamin Cage
- Membership Type: Associate (dropdown menu)
- Status: Active (dropdown menu)
- Paid?: Yes (dropdown menu)
- Member Number: (text input field)
- Start Date: 1-Jan-2008 (calendar icon)
- Expiry Date: 31-Dec-2008 (calendar icon)
- Save (button)

You are Done!

You have now added a member profile to the Administration Portal of Evolve. The member can from this point onwards log into the system and add their CPD events, work history and education qualifications!

If you have any questions about this process please email it to us at care@activ8.com.au for assistance.