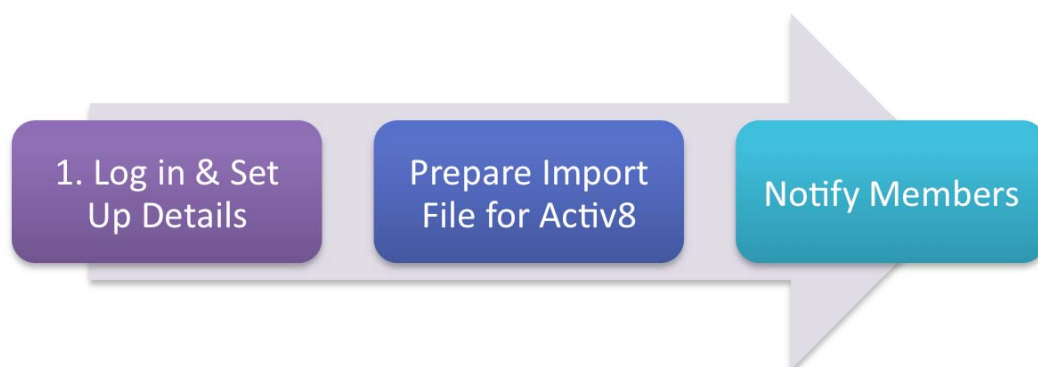


Getting Started

Introduction:

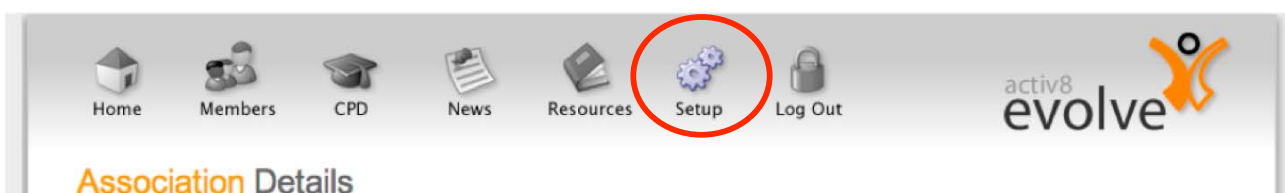
This guide is designed to assist your association in getting started with Evolve, and ensuring you set the best possible foundations for collecting your member CPD information in the most efficient and effective way.



Step 1: First Login & Set Up

Each association has an individual username and password that provides overall administrator control over the Evolve system. If you don't yet have your username and password please request them by emailing care@activ8.com.au

Once you have logged in visit the Setup section of Evolve using the icons across the top as shown below:



Using this screen you can update all your association-specific details including login password, and many of the drop-down menus you see throughout the system. We recommend you review the information in these as one of the first things you do. If you have an updated association logo you would like us to incorporate, please email it to us at care@activ8.com.au and we will add it straight away.

Getting Started

Step 2: Data Import or Entry

There are two ways to enter your member data into Evolve – one we like to call the easy way, and one we like to call the hard way 😊

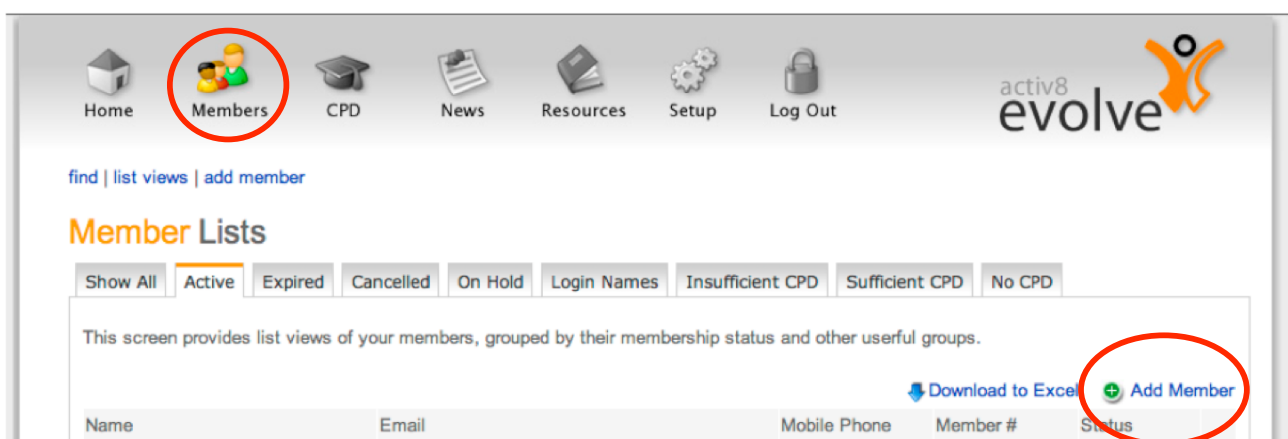
The easiest way is to export data from your current system and insert it into a special “import” excel file we have created. You can download this excel file if you need it from the following web address, or from the setup page when you log into Evolve (as part of Step 1 above):

www.activ8.com.au/downloads/evolve/CPD-MemberImport.xls

We highly recommend you take advantage of this complimentary data import service as it will save you an enormous amount of initial data entry, and provides you with a totally turn-key CPD solution! If you have any questions about the data import service, which runs on a 48 hour turnaround max, email us at care@activ8.com.au

Once you have done the initial import, its easy to add/remove/edit individual member records in the system via the web interface.

The alternative way to enter your member data is to use the web-based Add Member function as highlighted below.



This will start the add member wizard which walks you through:

- 1) Checking that the member is not already in the system as part of another association's database and if so
- 2) Entering their contact details
- 3) Entering their membership details

Getting Started

Step 3: Notify Members

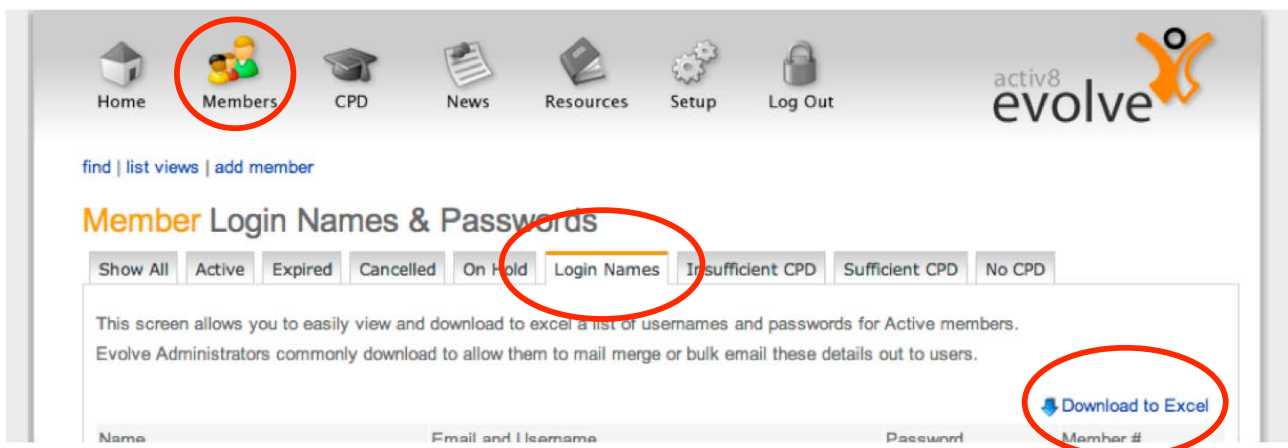
Setting up the CPD system is the easy part – the harder part for associations is often to motivate their members to log into the system and complete their CPD, Education and Work History details.

To log into Evolve the member uses their email address and their password, which if you did a bulk data import with us is normally their postal address postcode. Members can change their password after initial login, naturally.

Most associations have a bulk email system or regular mail-merge they use to communicate with their members, so with this in mind we created a special Login Names export feature that allows you to quickly and easily export a list of all the usernames and passwords from the system into a Microsoft Excel file you can use for your merge or bulk email out.

You can extract the list of login names for use in your merge or bulk email out as shown below:

- 1) Log into the Administration portal of Evolve
- 2) Click on the Members link at the top of the screen
- 3) Click on the **Login Names** tab, and use the **download to excel** function as shown below:



If you don't have a method of automatically notifying members of their login details (a bulk email system etc.) email the helpdesk for some suggested products you could use for this such as Vemail (www.vemail.com.au). The helpdesk email address is: care@activ8.com.au