

This document outlines the changes included in the September 2009 update to Activ8 Evolve, bringing the latest version number up to 2.5. These changes reflect the wish lists submitted since February 2009 and changes to the Activ8 web platform that flow through to products like Evolve.

Administration Updates

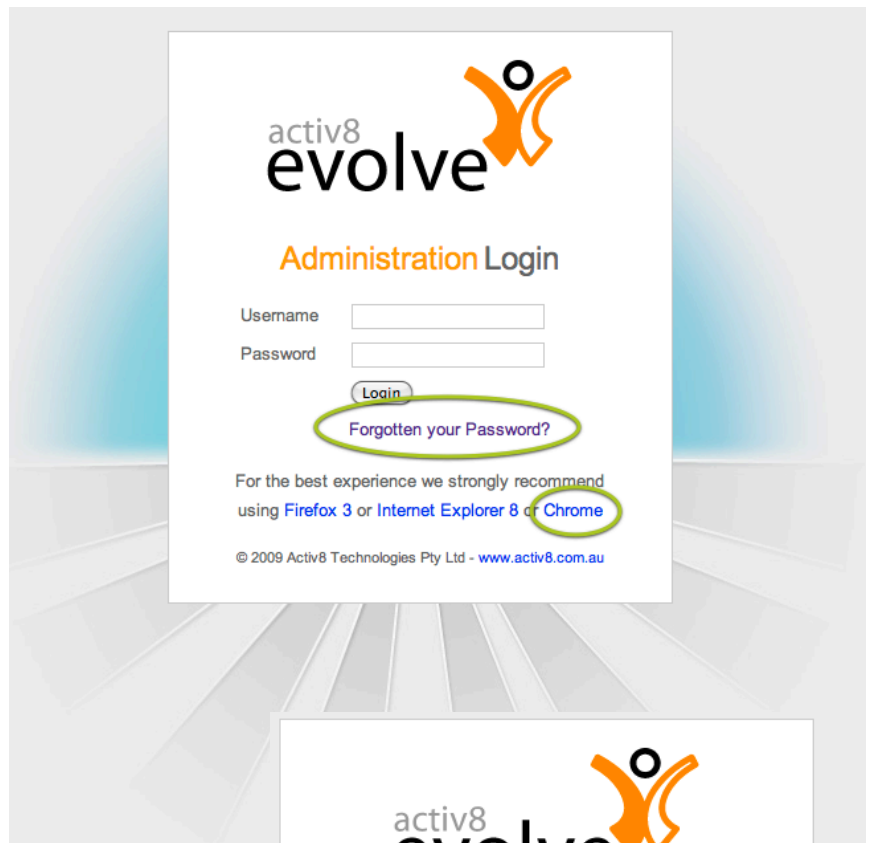
The following changes related to the Administrator Portal used by Association staff:

Login & Browser Changes

The administrator login page now has a forgotten password function to allow you to recover your login details should you forget! This has been quite a common request on our helpdesk so we are happy to include it in the September update.

To ensure this process is secure, the forgotten password function will ask you for your username and then email the password to the email address that was designated as the administrator when the system was set up.

One other change of note is that Activ8 Evolve has been fully tested on the latest browsers currently available including Google Chrome, Safari 4, Internet Explorer 8 and Firefox 3.5. Performance within Google Chrome is especially good with smooth animations and quick loading times.



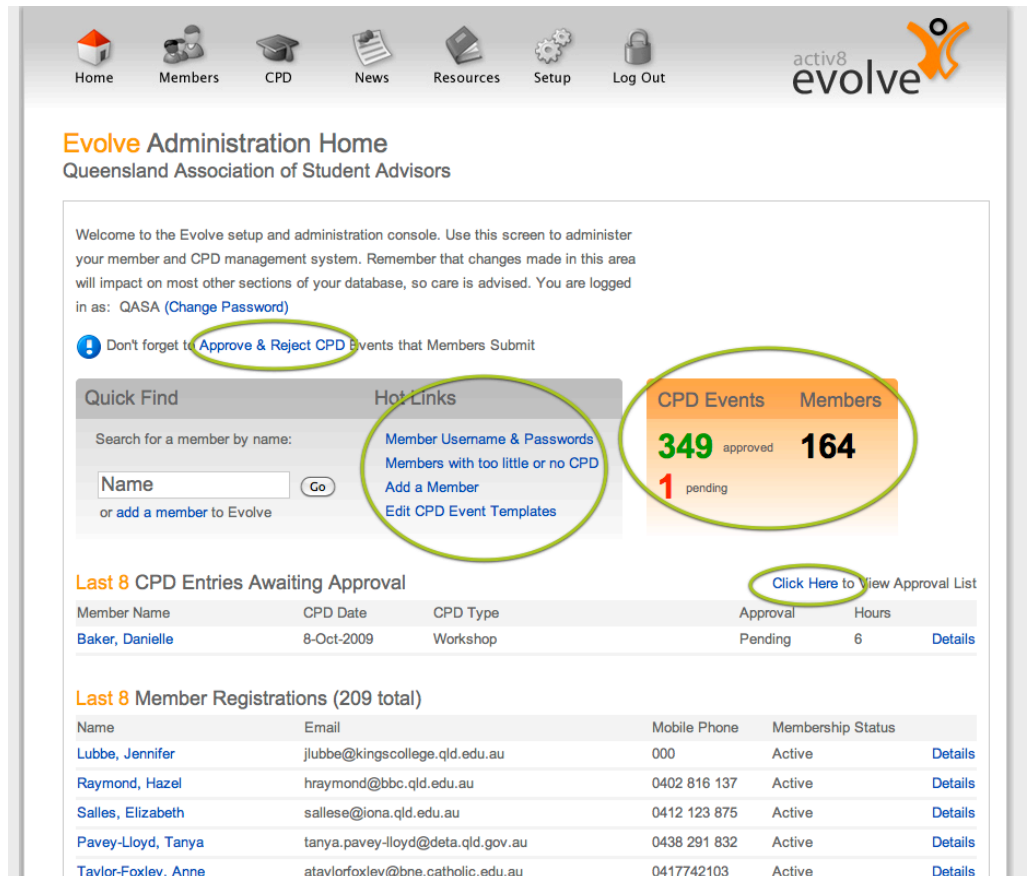
New Home Page Layout

The home page for Administrator access has been updated considerably with the September release. The major changes are summarised as follows:

*** Hot Links:** This list as indicated below provides rapid access to the most commonly used functions within the administrator portal. The September update also includes a new item - the "Edit CPD Event Templates". We review the statistics on Evolve monthly and adjust these links if we see a particular page should be added for quick access.

*** Dashboard Totals:** Note the orange panel on the right - this provides "at-a-glance" figures to let you know the status of your member database and CPD collection. These are the three most important figures in Evolve. Watch them grow with use :-)

*** Approval List:** Note above the recent CPD entries the link to visit the approval list. This provides single-click access to the new approvals screen (which includes an auto-approval for all)



Evolve Administration Home
Queensland Association of Student Advisors

Welcome to the Evolve setup and administration console. Use this screen to administer your member and CPD management system. Remember that changes made in this area will impact on most other sections of your database, so care is advised. You are logged in as: QASA ([Change Password](#))

! Don't forget to [Approve & Reject CPD](#) Events that Members Submit

Quick Find **Hot Links**

Search for a member by name:

Name

or [add a member](#) to Evolve

CPD Events **Members**

349 approved 164

1 pending

Last 8 CPD Entries Awaiting Approval [Click Here to View Approval List](#)

Member Name	CPD Date	CPD Type	Approval	Hours	
Baker, Danielle	8-Oct-2009	Workshop	Pending	6	Details

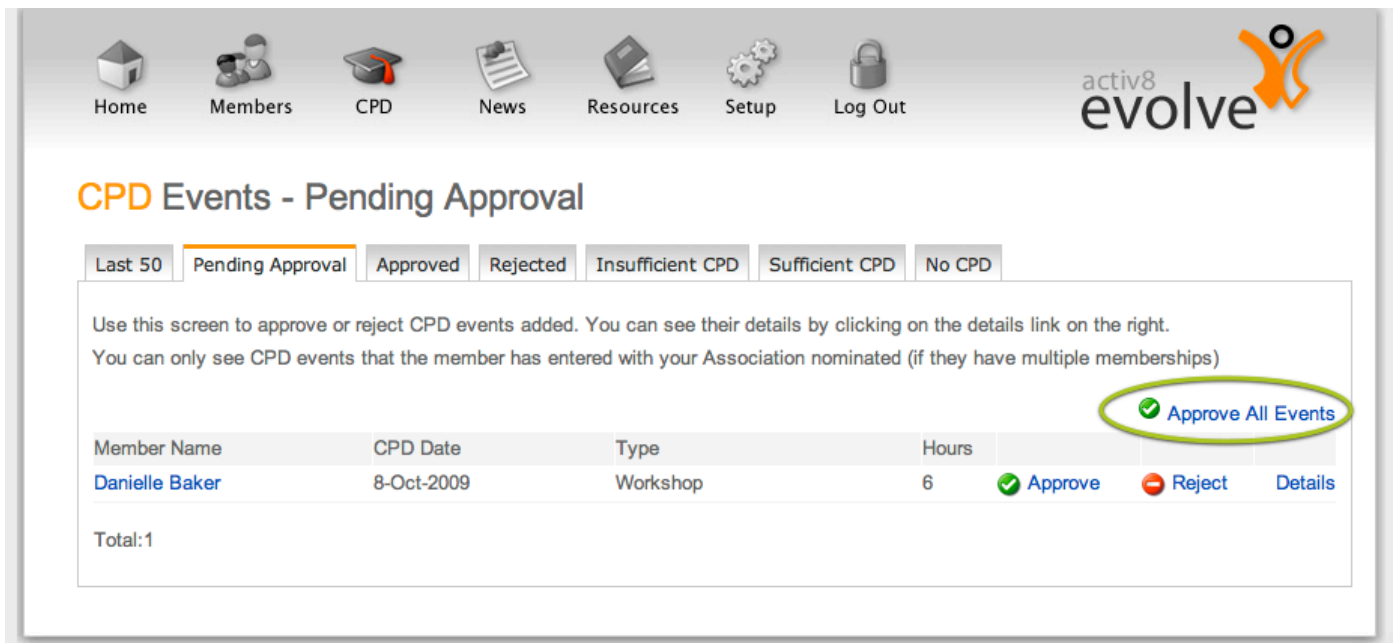
Last 8 Member Registrations (209 total)

Name	Email	Mobile Phone	Membership Status	
Lubbe, Jennifer	jlubbe@kingscollege.qld.edu.au	000	Active	Details
Raymond, Hazel	hraymond@bbc.qld.edu.au	0402 816 137	Active	Details
Salles, Elizabeth	sallesc@iona.qld.edu.au	0412 123 875	Active	Details
Pavey-Lloyd, Tanya	tanya.pavey-lloyd@detq.qld.gov.au	0438 291 832	Active	Details
Taylor-Foxley, Anne	ataylorfoxley@bne.catholic.edu.au	0417742103	Active	Details

Automatic/Bulk CPD Approval

The Evolve system is based on the concept of members being able to enter their CPD events, and the association being able to review and approve these if appropriate. This ensures that CPD entries are accurate and have the correct number of hours against them to be credited to the yearly requirement.

Alternatively, we have clients that use the “audit” method meaning they don’t need or want to review each CPD entry and approve them. Typically they would approve all the events and at the end of a year, or when required, open a random selection of files and audit them. As such the “approval” of events is a redundant function.



Home Members CPD News Resources Setup Log Out

activ8 evolve

CPD Events - Pending Approval

Last 50 Pending Approval Approved Rejected Insufficient CPD Sufficient CPD No CPD

Use this screen to approve or reject CPD events added. You can see their details by clicking on the details link on the right.
You can only see CPD events that the member has entered with your Association nominated (if they have multiple memberships)

Member Name	CPD Date	Type	Hours			
Danielle Baker	8-Oct-2009	Workshop	6	✓ Approve	✗ Reject	Details

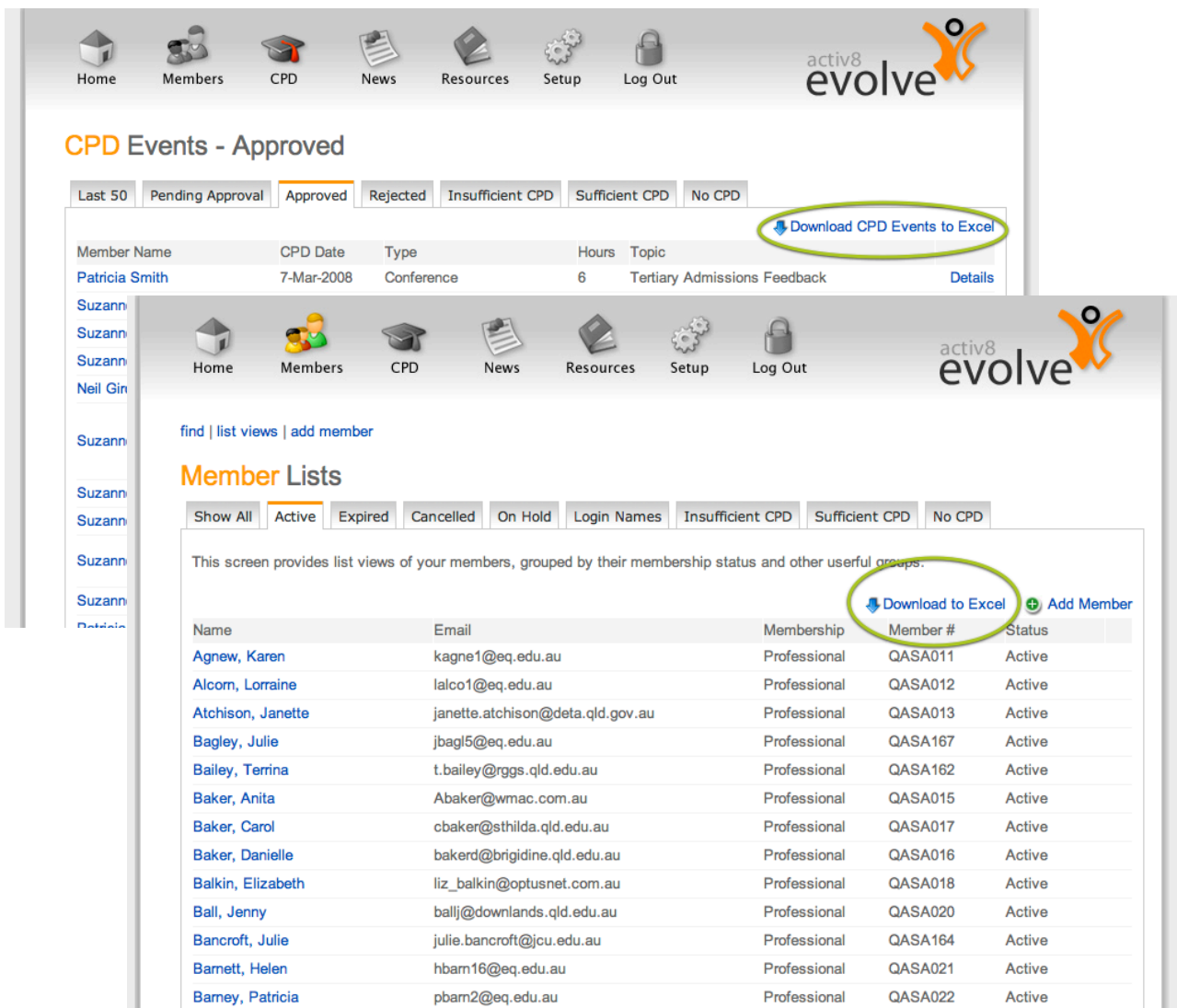
Total: 1

To ensure Evolve caters to both styles of CPD management we have added an “Approve All” option to allow single-click approval of all items in the pending queue. This works in tandem with the manual approve and reject links provided and as shown above.

Easy in Easy Out - Data Export Tools

Whilst there are many huge advantages to having a web application like Evolve hosted in the “Cloud”, one of the more common complaints for these types of scenarios is that all the data entered feels locked away, making it difficult to extract for local purposes, such as email lists etc.

The two biggest areas of information in Evolve are the member/membership database, and the actual CPD events database. In the latest update this year we have included download tools for both CPD and Member lists, allowing instant export of all the data to the most ubiquitous format for tables and data known - Microsoft Excel :-)



The screenshot displays two sections of the Evolve web application. The top section, titled "CPD Events - Approved", shows a table of events with a "Download CPD Events to Excel" button highlighted in a green circle. The bottom section, titled "Member Lists", shows a table of members with a "Download to Excel" button also highlighted in a green circle.

CPD Events - Approved

Member Name	CPD Date	Type	Hours	Topic	
Patricia Smith	7-Mar-2008	Conference	6	Tertiary Admissions Feedback	Details

Member Lists

This screen provides list views of your members, grouped by their membership status and other useful groups.

Name	Email	Membership	Member #	Status
Agnew, Karen	kagne1@eq.edu.au	Professional	QASA011	Active
Alcorn, Lorraine	lalco1@eq.edu.au	Professional	QASA012	Active
Atchison, Janette	janette.atchison@deta.qld.gov.au	Professional	QASA013	Active
Bagley, Julie	jbagl5@eq.edu.au	Professional	QASA167	Active
Bailey, Terrina	t.bailey@rggs.qld.edu.au	Professional	QASA162	Active
Baker, Anita	Abaker@wmac.com.au	Professional	QASA015	Active
Baker, Carol	cbaker@sthilda.qld.edu.au	Professional	QASA017	Active
Baker, Danielle	bakerd@brigidine.qld.edu.au	Professional	QASA016	Active
Balkin, Elizabeth	liz_balkin@optusnet.com.au	Professional	QASA018	Active
Ball, Jenny	ballj@downlands.qld.edu.au	Professional	QASA020	Active
Bancroft, Julie	julie.bancroft@jcu.edu.au	Professional	QASA164	Active
Barnett, Helen	hbarn16@eq.edu.au	Professional	QASA021	Active
Barney, Patricia	pbarn2@eq.edu.au	Professional	QASA022	Active

Admin User Security

Organisations are given a default administrator login to allow backend access to member and CPD details. However you can easily add other admin users if required. Simply browse to the "User Security" tab of the "Setup" icon and add as many staff or admin users as required. These are often "state" or "district" logins.

The screenshot displays the 'User Security' interface within the 'activ8 evolve' system. The top navigation bar includes icons for Home, Members, CPD, News, Resources, Setup (circled in green), and Log Out. The 'User Security' tab is selected in the sub-navigation bar (also circled in green). The main content area contains a table of users and an 'Add User' button.

Username	Password	Email
test	test	care@activ8.com.au
QASA	QASA	test@test.com

Total:2

[Add User](#)

Add a User

Username:

Password:

Email:

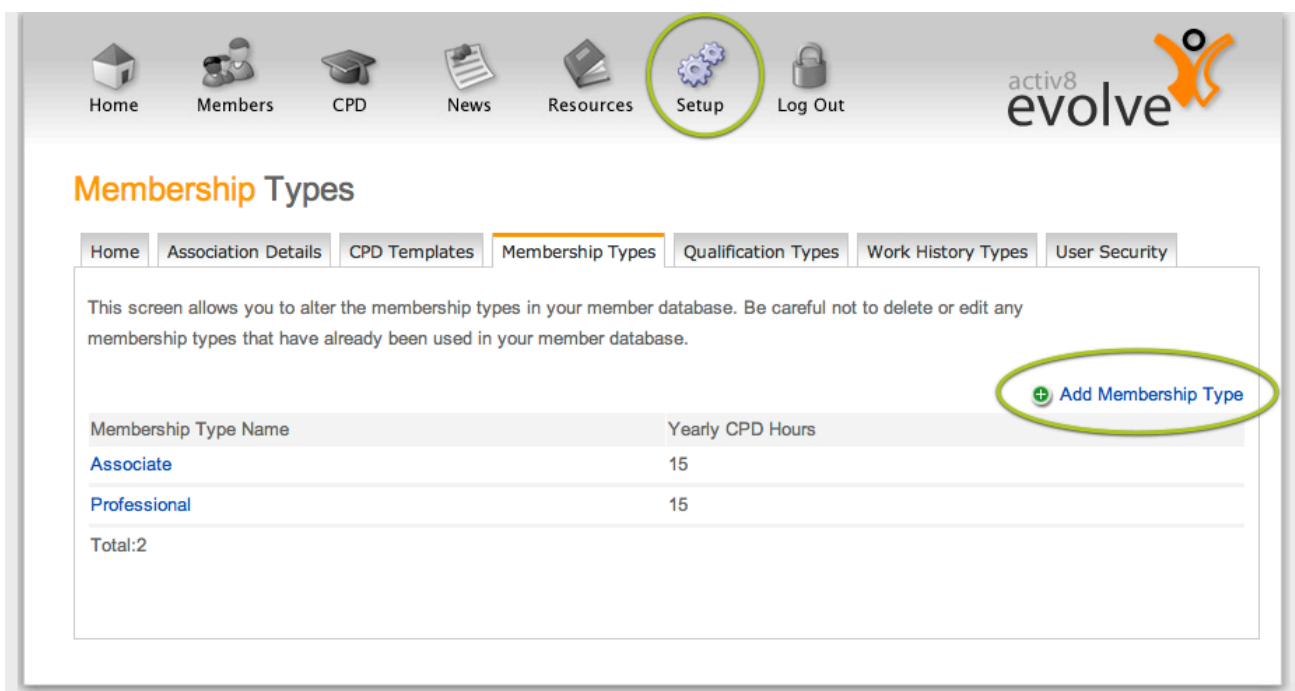
or

Multi Membership Model Updated

Evolve now includes support for multiple membership types, making it easy to have different membership levels and related CPD hours required for each level. For example you may have 3 different membership levels within your association:

- * **Casual** - 20 hours
- * **Professional** - 30 hours
- * **Associate** - 40 hours

The screen below is where these hourly requirements can be established, and these requirements then flow through to all members with that level of membership in the system.



The screenshot shows the 'Membership Types' configuration page. At the top, there is a navigation bar with icons for Home, Members, CPD, News, Resources, Setup (circled in green), and Log Out. The 'activ8 evolve' logo is on the right. Below the navigation bar, the page title is 'Membership Types'. There are several tabs: Home, Association Details, CPD Templates, Membership Types (selected), Qualification Types, Work History Types, and User Security. A text box explains that users can alter membership types but should be careful not to delete or edit any that have already been used. A green circle highlights the '+ Add Membership Type' button. Below this is a table with two columns: 'Membership Type Name' and 'Yearly CPD Hours'.

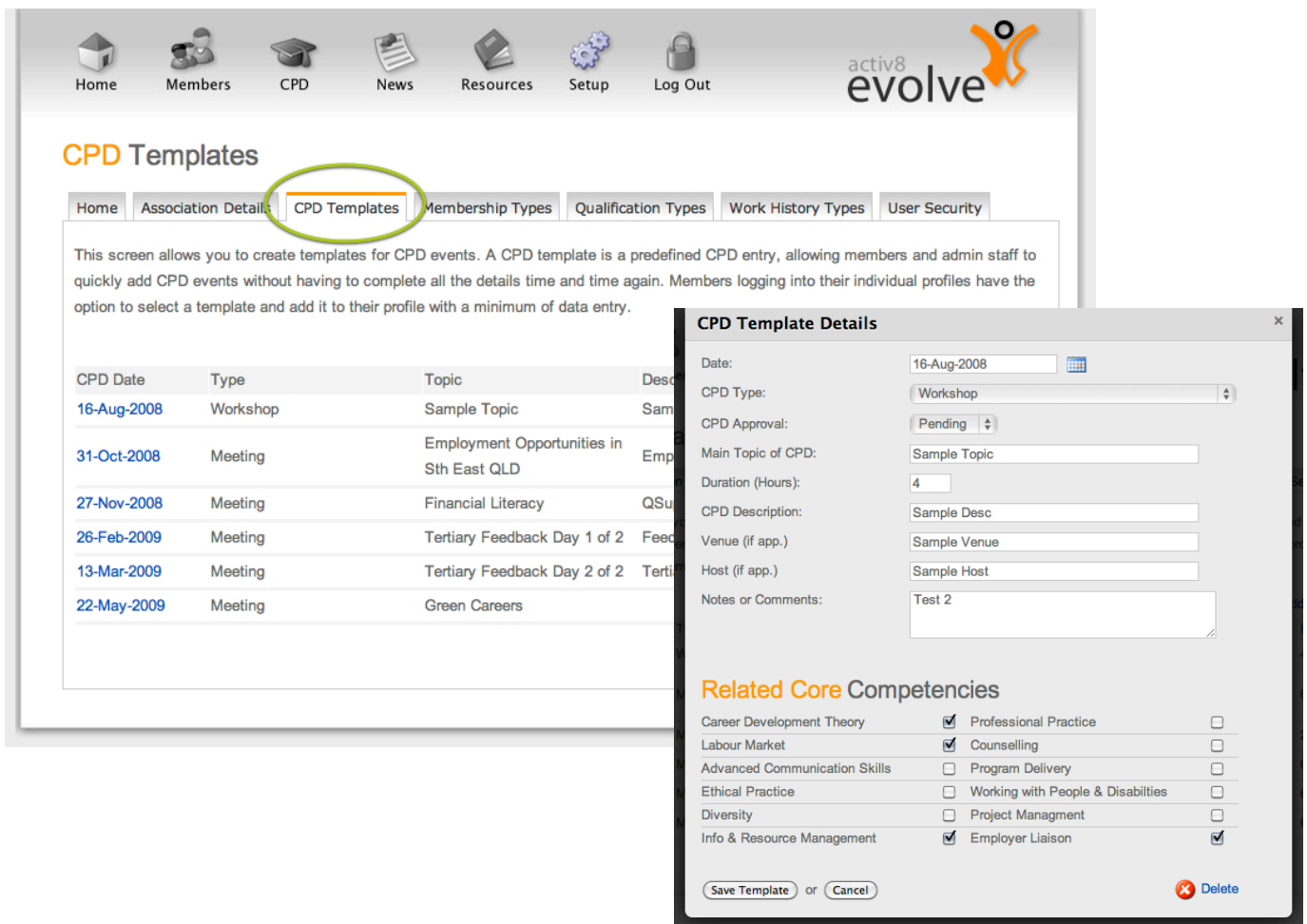
Membership Type Name	Yearly CPD Hours
Associate	15
Professional	15
Total:2	

CPD Templates

Probably the biggest change this year to Activ8 Evolve is the use of CPD Templates. This new feature allows association staff to create a set of templates, or presets, that can be applied to any member CPD history with only a few clicks.

For example you may have 3 events on in the year that members may attend. It would be wise to create a CPD template for these events that includes all the details, competencies and applicable hours. Members can then log into their CPD history and add that event quickly and easily without having to enter all the details themselves. If association staff are entering the CPD, even better! Time savings, and accuracy of information is far higher.

We recommend creating templates for as many applicable CPD events as possible.



CPD Templates

This screen allows you to create templates for CPD events. A CPD template is a predefined CPD entry, allowing members and admin staff to quickly add CPD events without having to complete all the details time and time again. Members logging into their individual profiles have the option to select a template and add it to their profile with a minimum of data entry.

CPD Date	Type	Topic	Description
16-Aug-2008	Workshop	Sample Topic	Sample
31-Oct-2008	Meeting	Employment Opportunities in Sth East QLD	Emp
27-Nov-2008	Meeting	Financial Literacy	QSu
26-Feb-2009	Meeting	Tertiary Feedback Day 1 of 2	Feed
13-Mar-2009	Meeting	Tertiary Feedback Day 2 of 2	Terti
22-May-2009	Meeting	Green Careers	

CPD Template Details

Date: 16-Aug-2008

CPD Type: Workshop

CPD Approval: Pending

Main Topic of CPD: Sample Topic

Duration (Hours): 4

CPD Description: Sample Desc

Venue (if app.): Sample Venue

Host (if app.): Sample Host

Notes or Comments: Test 2

Related Core Competencies

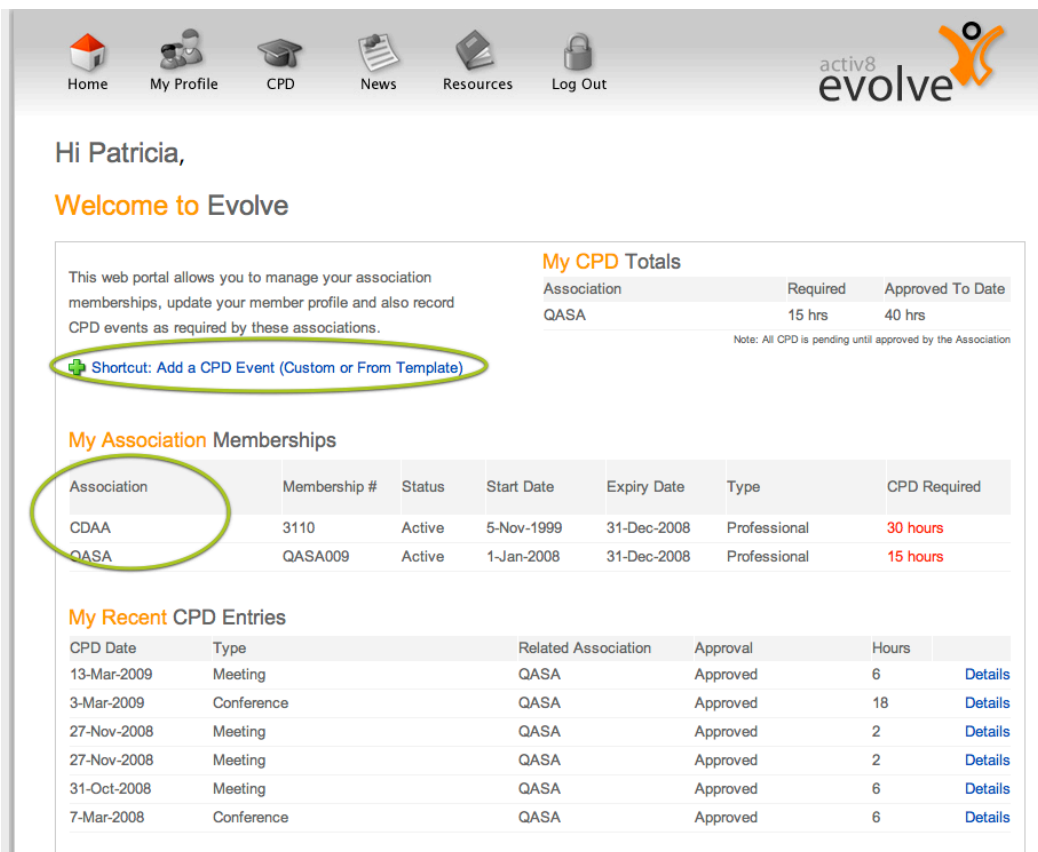
Career Development Theory	<input checked="" type="checkbox"/>	Professional Practice	<input type="checkbox"/>
Labour Market	<input checked="" type="checkbox"/>	Counselling	<input type="checkbox"/>
Advanced Communication Skills	<input type="checkbox"/>	Program Delivery	<input type="checkbox"/>
Ethical Practice	<input type="checkbox"/>	Working with People & Disabilities	<input type="checkbox"/>
Diversity	<input type="checkbox"/>	Project Management	<input type="checkbox"/>
Info & Resource Management	<input checked="" type="checkbox"/>	Employer Liaison	<input checked="" type="checkbox"/>

Save Template or Cancel Delete

Member Home Page Updates

To reflect the new features available - CPD Templates and Multiple Membership hours, the home page of the Member Portal has been updated . Probably the most important link on the entire page is now situated just below the introduction text. This link takes you to the CPD entry screen - allowing the use of the new “Templating” features.

The top-right corner now also displays the total hours required and approved, BY ASSOCIATION and not overall total - so a member can see not only their CPD totals, but the required hours for each association relating to their membership level.



Home My Profile CPD News Resources Log Out

activ8 evolve

Hi Patricia,

Welcome to Evolve

This web portal allows you to manage your association memberships, update your member profile and also record CPD events as required by these associations.

[+ Shortcut: Add a CPD Event \(Custom or From Template\)](#)

My CPD Totals

Association	Required	Approved To Date
QASA	15 hrs	40 hrs

Note: All CPD is pending until approved by the Association

My Association Memberships

Association	Membership #	Status	Start Date	Expiry Date	Type	CPD Required
CDAA	3110	Active	5-Nov-1999	31-Dec-2008	Professional	30 hours
QASA	QASA009	Active	1-Jan-2008	31-Dec-2008	Professional	15 hours

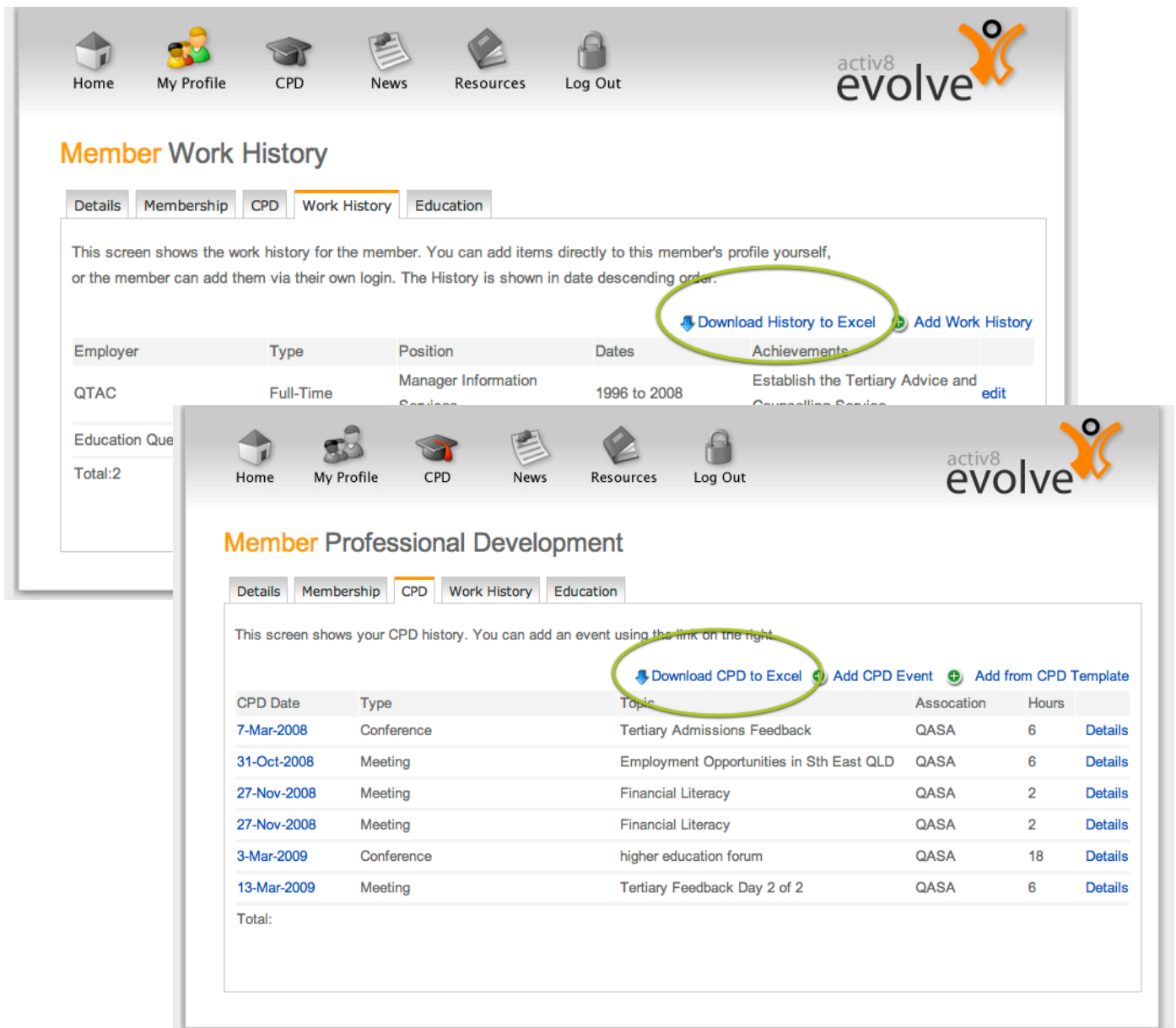
My Recent CPD Entries

CPD Date	Type	Related Association	Approval	Hours	
13-Mar-2009	Meeting	QASA	Approved	6	Details
3-Mar-2009	Conference	QASA	Approved	18	Details
27-Nov-2008	Meeting	QASA	Approved	2	Details
27-Nov-2008	Meeting	QASA	Approved	2	Details
31-Oct-2008	Meeting	QASA	Approved	6	Details
7-Mar-2008	Conference	QASA	Approved	6	Details

Member Data Downloads

As with the administrator portal, the member portal also has the ability to download CPD and Work History details to Excel. This gives members the ability to archive their own data, and avoids the situation where their own data is locked away on the web.

Note in the two screen shots below the download links appear in the CPD and Work History screens above the lists. Also note on the CPD screen shot the new "Add from CPD Template" link - allowing members to add a CPD event from the association's "menu" of preset CPD events.



Member Work History

Details | Membership | CPD | **Work History** | Education

This screen shows the work history for the member. You can add items directly to this member's profile yourself, or the member can add them via their own login. The History is shown in date descending order.

[Download History to Excel](#) [Add Work History](#)

Employer	Type	Position	Dates	Achievements
QTAC	Full-Time	Manager Information Services	1996 to 2008	Establish the Tertiary Advice and Counselling Service edit

Education Que
Total:2

Member Professional Development

Details | Membership | **CPD** | Work History | Education

This screen shows your CPD history. You can add an event using the link on the right.

[Download CPD to Excel](#) [Add CPD Event](#) [Add from CPD Template](#)

CPD Date	Type	Topic	Association	Hours	
7-Mar-2008	Conference	Tertiary Admissions Feedback	QASA	6	Details
31-Oct-2008	Meeting	Employment Opportunities in Sth East QLD	QASA	6	Details
27-Nov-2008	Meeting	Financial Literacy	QASA	2	Details
27-Nov-2008	Meeting	Financial Literacy	QASA	2	Details
3-Mar-2009	Conference	higher education forum	QASA	18	Details
13-Mar-2009	Meeting	Tertiary Feedback Day 2 of 2	QASA	6	Details

Total: