

vTools Updates

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Topics

IEEE WordPress Hosting Migration

Survey tool replacement

vTools.Events, vTools.Voting, vTools.eNotice updates

OU Analytics

Where to find more information, report problems, etc.

IEEE WordPress Hosting Migration

Sites hosted on sites.ieee.org will be migrated to more secure server for better security and performance

Notifications have been sent to list of known site owners

You must opt in ASAP for migration

Else your site will go dark after Dec 31st

A redirect will be set up to redirect traffic from your current site to your new site after it's been migrated

If you have a custom domain, its CName will need to be updated later

Survey tool replacement update

Checkbox is FluidSurveys replacement

Accounts are created per request from [vTools portal](#)

54 accounts have been created so far

IEEE staff is using Checkbox as well

vTools.Events updates

- ▶ **@Event** is a new on-site registration feature
 - Available via Events web page; works on mobile devices too
 - View registrations
 - Add new registrations
 - Check-in attendees
 - Update registration information
 - For more details see <http://sites.ieee.org/vtools/event-enhanced-on-site-registration-using-a-mobile-tablet-device>
- ▶ **GDPR Compliance changes**
 - Events registration includes IEEE Privacy Policy
 - Event Management includes Data Access and Use Policy consent for volunteers

vTools.Voting updates

▶ Enhancements

- Added auto-load option for voter list
- Updated links for required reporting for local election results and voter instructions

▶ GDPR Compliance changes

- Removed voter status option
- Voting Dashboard includes Data Access and Use Policy consent for volunteers

vTools.eNotice updates

- ▶ Expanded usage of eNotice to support Societies
- ▶ Added Express option for Student Branches and HKN Chapters

IEEE OU Analytics

What is OU Analytics

- ▶ In May, OU Analytics replaced SAMIEEE as the tool for volunteers to access membership data and statistics
 - OU Analytics is built on Tableau business intelligence tool
 - OU Analytics uses the same data sources used by SAMIEEE
 - Accessible via browser and mobile app
- ▶ Access is based on the volunteers' position and OU.
 - User will only obtain data for their OU unit(s) and position level.
 - For a list of volunteer positions, go to:
http://www.ieee.org/about/volunteers/samieeee/samieeee_positions.html
- ▶ OU Analytics allows users to view and further define visualizations based on IEEE membership data
 - Users can also download detailed data such as membership lists

OU Analytics updates

- ▶ Recent access issues
 - There were issues with the process that synchronizes user access to OU Analytics which impacted volunteer access for several days
 - All existing access to volunteers have been restored
- ▶ Staff adding missing functionality, improving FAQ page, and developing short “how-to” videos
 - [See what's coming in the future](#)
- ▶ OU Analytics User Group
 - Purpose: identify the top issues affecting user productivity, and provide a communication path between users and IEEE staff
 - Issues are added to vTools committee prioritized issue list
 - The user group is currently meeting twice a month via WebEx.
 - If you are interested in participating, contact Chris Gunning (cgunning@ieee.org) or Larry Hamerman (l.hamerman@ieee.org)
- ▶ IEEE Collabratec Group: *IEEE OU Analytics*
 - Foster communication between IEEE staff and volunteers

Finding more information

Learning about tools, reporting problems, getting help

Portal: <http://sites.ieee.org/vtools> (quick tip: Google “ieee vtools”)



- Home – overview, video introduction
- Tools – list and description of tools
- Tutorials – on-demand “quick start” web tutorials
- FAQ
- Blog – news and tips
- Feedback – submit feature requests and bug reports
- Contact – send message to vTools staff

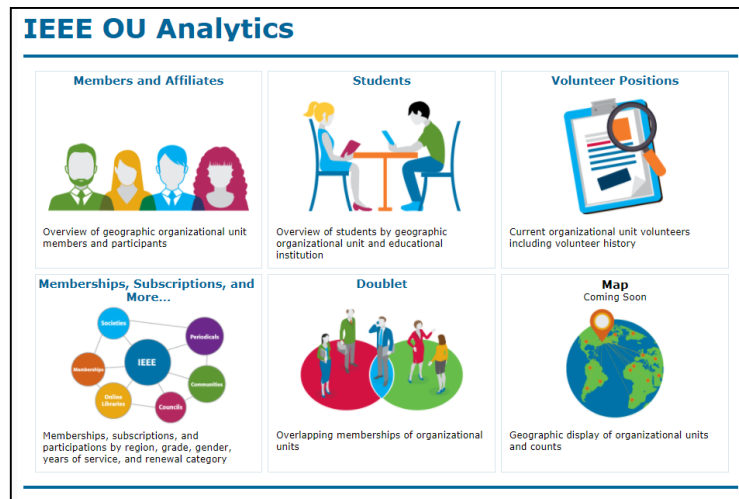
Q&A

Backup

IEEE OU Analytics

How to access

- ▶ Convenient link available on SAMIEEE Home Page at:
<https://mga.ieee.org/resources-operations/volunteer-tools/samiee>
- ▶ Or access the Dashboard Landing Page directly at:
https://tblanalytics.ieee.org/#/site/IEEE/views/LandingPage_0/LandingPage?:iid=1



IEEE OU Analytics

How to navigate the dashboards

- ▶ On the dashboard pages (example: “Members and Affiliates” link.) users will see . . .

The screenshot shows the 'Members and Affiliates' dashboard. At the top, a breadcrumb bar indicates the path: Home > SAMIEEE for Volunteers > Members and Affiliates > Dashboard. Below this is a toolbar with actions like Undo, Redo, Revert, Refresh, and Pause. A secondary toolbar includes Original View, Subscribe, Share, Download, and Full Screen. The main content area has tabs for 'Dashboard' and 'Detail'. A filter section contains three dropdown menus: 'Region' (set to '(All)'), 'Grade' (set to '(All)'), and 'IEEE Status' (set to 'Active').

Two callouts highlight key features:

- Bread crumb bar**: Points to the navigation path at the top.
- Available datasources**: Points to the 'Dashboard' and 'Detail' tabs.
- Available Filter Boxes**: Points to the 'Region', 'Grade', and 'IEEE Status' dropdown menus.

The dashboard displays two visualizations:

Count by Region and Grade

Region	Council	Section	Grade Category	Grade	Total		
R1	Metro Sec. Act. Council	Connecticut Section	IEEE Grades	Associate Member	52		
				Fellow	21		
				Graduate Student Member	136		
				Honorary Member	1		
				Life Fellow	24		
				Life Member	333		
				Life Senior	80		
				Member	1,001		
				Senior Member	131		
				Student Member	136		
				Other Grades		Affiliate	65
						SA Member	1
				Total			1,981
				Long Island Section		IEEE Grades	Associate Member







Count by Gender

Gender	Percentage
Male	75.82%
Female	11.22%
Unknown	12.96%

IEEE OU Analytics

Now for a closer look at the individual dashboards

IEEE OU Analytics

<h3>Members and Affiliates</h3>  <p>Overview of geographic organizational unit members and participants</p>	<h3>Students</h3>  <p>Overview of students by geographic organizational unit and educational institution</p>	<h3>Volunteer Positions</h3>  <p>Current organizational unit volunteers including volunteer history</p>
<h3>Memberships, Subscriptions, and More...</h3>  <p>Memberships, subscriptions, and participations by region, grade, gender, years of service, and renewal category</p>	<h3>Doublet</h3>  <p>Overlapping memberships of organizational units</p>	<h3>Map</h3> <p>Coming Soon</p>  <p>Geographic display of organizational units and counts</p>

IEEE OU Analytics

Members and Affiliates Dashboard

- ▶ The Members and Affiliates Dashboard provides an overview of IEEE members, society affiliates, and SA members by their geographic organizational units.
- ▶ An overview count of members by Region, Council, Section and Subsection is available.

Members and Affiliates



Overview of geographic organizational unit members and participants

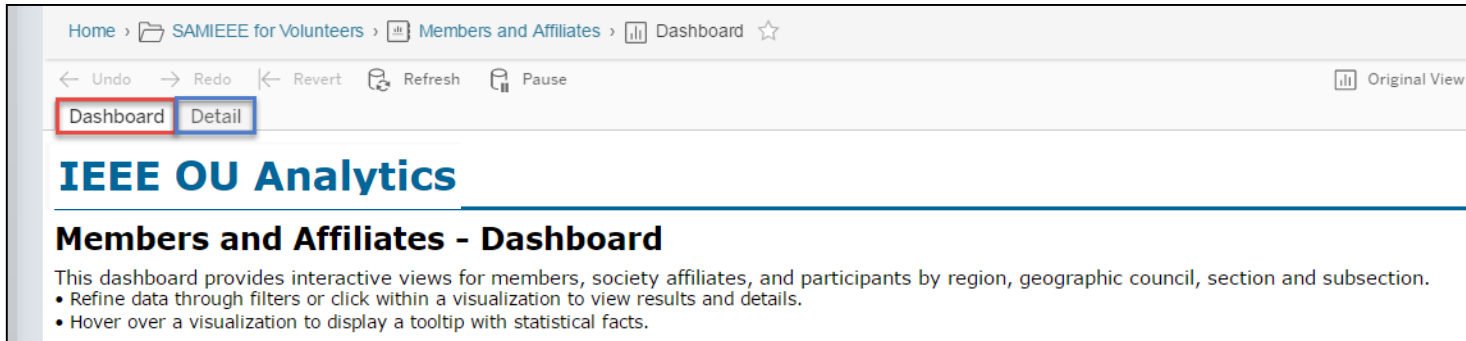
Count by Region and Grade

Region	Council	Section	Grade Category	Grade	Total
R1	Metro Sec. Act. Council	Princeton/Central Jersey Section	IEEE Grades	Associate Member	69
				Fellow	49
				Graduate Student Member	103
				Honorary Member	1
				Life Fellow	39
				Life Member	216
				Life Senior	61
				Member	1,254
				Senior Member	196
				Student Member	122
				Other Grades	Affiliate
			SA Member	2	
			Total	2,166	
			Total	2,166	

IEEE OU Analytics

Members and Affiliates - Dashboard

- ▶ There are two tabs available.
 - Dashboard – shows the predefined tables and charts available for a breakdown view of your members.
 - Detail – contains the individual member information. Access the member information by clicking on “View Details” in Tool Tips or clicking on “Detail” tab.
 - Detail shows member contact information.
 - Download contains additional fields depending on dashboard.



The screenshot shows a web browser window with the following elements:

- Browser address bar: Home > SAMIEEE for Volunteers > Members and Affiliates > Dashboard ☆
- Navigation bar: Undo, Redo, Revert, Refresh, Pause, and Original View.
- Tab bar: Two tabs are visible, "Dashboard" and "Detail". The "Detail" tab is highlighted with a blue border, and the "Dashboard" tab is highlighted with a red border.
- Page header: **IEEE OU Analytics**
- Section header: **Members and Affiliates - Dashboard**
- Text: This dashboard provides interactive views for members, society affiliates, and participants by region, geographic council, section and subsection.
- Bullets:
 - Refine data through filters or click within a visualization to view results and details.
 - Hover over a visualization to display a tooltip with statistical facts.

IEEE OU Analytics

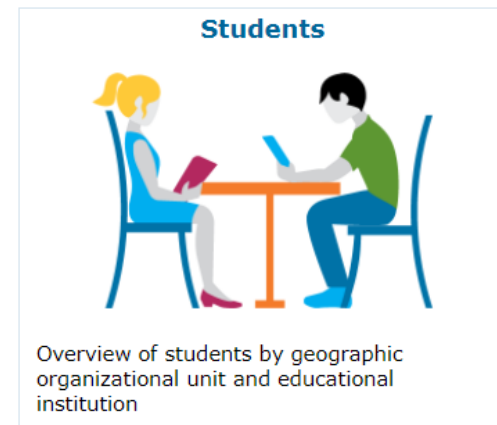
Downloading Data

- ▶ Tableau provides many tools for displaying, filtering, and manipulating data. However, if you need to download, there are several options found under the Download button.
- ▶ The following options are available:
 - **Image** – downloads the image on your screen to a png file.
 - **Data** – (not recommended) downloads the data to a csv file. This option requires multiple steps for downloading to a text file and does not retain format.
 - **Crosstab** – (recommended download option) downloads the data to a csv file.
 - **PDF** – downloads the image on the screen to a PDF file.
- ▶ **Important note**, if you do not select the title of the visualization before clicking Download, the data and crosstab options will be grayed out.

IEEE OU Analytics

Students - Dashboard

- ▶ The Student Dashboard provides information regarding members (any grade) attending educational institutions. Information is grouped by Region, Section and School.
- ▶ There are two dashboard tabs available:
 - Dashboard – shows the predefined tables and visualizations available for a breakdown view by School, Grade, Gender and Field of Study.
 - Detail – contains the individual member information.
- ▶ Top level filtering is on Region, Grade and IEEE Status.



IEEE OU Analytics

Volunteer Positions - Dashboard

- ▶ The Volunteers Dashboard has two tabs and one link available.



- ▶ **Volunteer Positions** – lists “all” current IEEE volunteer positions. Use filter options to select a specific OU type and OU Name.



IEEE OU Analytics

Memberships, Subscriptions, and More... - Dashboard

- ▶ **Renewal Category Dashboard** – provides product renewal information based on filters selected. Renewal categories provided are: Renew, First Year Renewed, New, Reinstated, Not Yet Renewed and Cancelled.
- ▶ Filters provided are Product Type, Product Name, Region, Grade, and Status.
 - **Overview of Product Renewals** (bar chart) – provides a breakdown by renewal categories. Hover over to view additional statistical information.
 - **Product Summary by Region by Renewal Category** (data table) – provides a count of members by Region by Renewal Category.
 - **Recommendation:** Downloading Column and Row Totals default to “Grand Total” counts, which can be significant and provide excess data. Use Filters to refine data per OU.

IEEE OU Analytics

Questions & Assistance

- ▶ If you have any questions regarding OU Analytics or need further assistance send an email to ouanalytics@ieee.org

Other recent vTools changes (2017)

▶ Events

- New support for custom registration questions
- New support for student branches and IEEE-HKN
- Registration payment data now includes price description and restriction

▶ eNotice

- Personalization of eNotice messages
- Customization of 'From' and 'Reply To'
- Send test eNotice
- Link to view an event included in eNotice messages

▶ Officer Reporting

- Updated look and feel