

Table of Contents

Getting Started with vTools

- ▶ Overview of vTools Homepage
- ▶ vTools Products
- ▶ Logging in to vTools

Introduction to vTools.Meetings

- ▶ Scheduling
 - Schedule Meeting Form
 - Selection of Organizational Unit
 - Setting Meeting Dates
 - Adding a Map to show location of meeting

Table of Contents

- › Reviewing the scheduled meeting

Find, Edit, Cancel, and Delete an Existing Meeting

- › Find a meeting (Show)
 - Meeting options
- › Edit an existing meeting
- › Cancel a meeting (edit meeting to cancel)
- › Delete an existing meeting

Using an existing Meeting as a template in creating a new Meeting Notice

- › Find an existing meeting to use as a template

Table of Contents

- [Creating from existing meeting](#)
- [Save the new meeting](#)

[Registration Functionality and Meeting Statistics](#)

- [Find an existing meeting to use as a template](#)
- [Edit existing meeting notice](#)
- [Setting registration date and time](#)
- [Registration options](#)
 - [Adding menu choices](#)
- [Attendees registration process](#)
- [View Meeting Statistics](#)

Table of Contents

[View / Print Menu and Name Tags](#)

- ▶ [Find a meeting](#)
- ▶ [View and Print Name tag](#)
- ▶ [View and Print Meal Selection](#)

[Create and Search L31 Reports](#)

- ▶ [Find an L31 Report](#)
- ▶ [Create an L31 Report](#)
- ▶ [Validation errors](#)
- ▶ [Save and Create L31 Report](#)
- ▶ [Edit the meeting report](#)

Table of Contents

- [Search for an L31 report](#)
- [Create an L31 report from an existing meeting notice](#)

[How to automatically fill in fields in similar L31 reports](#)

[Payment Functionality](#)

- [Introduction to Payment Functionality](#)
- [Enable payment functionality](#)
- [Admission charge](#)
- [Admission charge – Pricing levels](#)
- [Enable payment functionality – cont'd.](#)
- [View registration form](#)

Table of Contents

- [Add multiple registrants to card payment](#)
- [System recognizes the member number is not for a discount grade – correlate with title of slide](#)
- [Make payment through PayPal](#)
- [Successful registration and payment](#)
- [View payment details](#)
- [E-mail Meeting Statistics](#)
- [Reservation Confirmation](#)

[Meeting Notice feeds and iCal Functionality](#)

- [Upcoming Meetings for an organizational unit](#)

Table of Contents

- › [View Feeds - IEEE vTools Meeting System](#)
- › [Feeds for a particular user](#)
[\(e.g. R3, Alabama section volunteer\)](#)
- › [Upcoming R3 Meetings \(RSS\)](#)
- › [HTML View of Upcoming R3 Meetings](#)
- › [HTML Source of Upcoming R3 Meetings](#)
- › [XML List of Upcoming R3 Meetings](#)
- › [Google Calendar](#)
- › [Region 3 Calendar after linking Region 3 Upcoming Meetings ical feed \(Week View\)](#)
- › [Google calendar event and details](#)

Table of Contents

- › [Region 3 Calendar after linking Region 3 Upcoming Meetings ical feed \(Week View\)](#)
- › [Google calendar event and details](#)

[How vTools.Meetings integrates with myIEEE](#)

[Introduction to vTools.WebInABox](#)

- › [WebInABox Home page](#)
- › [Text View of IEEE_meeting_feed.ics made from Upcoming R3 Meetings](#)
- › [Select Organizational Unit](#)
- › [Select Organizational Unit](#)
- › [Edit “Welcome” Page](#)

Table of Contents

- › [Edit “Calendar” Page](#)
- › [Edit “Officer Roster” Page](#)
- › [Edit “Other Units” Page](#)
- › [Edit “Blog” Page](#)
- › [Edit “Links” Page](#)
- › [Edit “Files” Page](#)
- › [Preview, Save, or Discard changes](#)
- › [Preview WebInABox site](#)
- › [Save Changes](#)
- › [Activate Website](#)

Table of Contents

- ▶ [Viewing Activated site](#)
- ▶ [Adding a link after saving changes](#)

[WebInABox – Redirect visitors to new site](#)

- ▶ [Introduction to Redirecting visitors to new WebInABox site](#)
- ▶ [Redirect Script](#)

[vTools Voting: Creating a Ballot - Instructions for volunteers on managing a ballot and running an election](#)

- ▶ [Manage Ballots](#)
- ▶ [Ballot Dashboard](#)
- ▶ [Choosing a Template](#)

Table of Contents

- › [Filling out the Ballot](#)
- › [Candidate Information](#)
- › [Loading an Image for the Candidate](#)
- › [Load and Save Candidate Image](#)
- › [Adding more Candidates for Each Position](#)
- › [Deleting a Position](#)
- › [Editing a Position on the Ballot](#)
- › [Allowing “Write-in Candidate” for Each Position](#)
- › [Adding a Voter List](#)
- › [Previewing the Ballot](#)

Table of Contents

- › [Activating the Ballot](#)
- › [The Activated Ballot](#)
- › [E-mailing Voters of the Ballot](#)
- › [E-mail Log](#)
- › [Changing the Election End Date](#)
- › [Viewing Election Results](#)
- › [Logging Out](#)

[vTools Voting: Getting Voter List](#)

- › [Tutorial Introduction](#)
- › [SAMIEEE Homepage](#)

Table of Contents

- › [SAMIEEE Training](#)
- › [Access SAMIEEE](#)
- › [SAMIEEE: Use Statement](#)
- › [Logging into SAMIEEE](#)
- › [SAMIEEE Landing Page](#)
- › [Geographic Pre-defined Queries](#)
- › [Selecting an Appropriate Pre-defined Query](#)
- › [Selecting a Section](#)
- › [Exporting Results](#)
- › [Saving the Voter List](#)

Table of Contents

- › [Getting a List of Chapter Voters](#)
- › [List of Society Acronyms and Descriptions](#)
- › [Running the Query for Chapter Voter List](#)
- › [Exporting the Chapter Voter List](#)
- › [Example of a voter list](#)

[vTools.Voting – Voter Tutorial](#)

- › [Voting Options](#)
- › [Voting on Ballot](#)
- › [Candidate Information](#)
- › [Write-in Candidates](#)

Table of Contents

- › [Edit Choices](#)
- › [Completing Ballot](#)
- › [Vote Confirmation](#)
- › [Status of Vote](#)
- › [Contact Election Manager](#)
- › [Logging Out](#)

[Introduction to vTools.Officer Reporting](#)

- › [Creating an Officer Report](#)
- › [View Logs](#)
- › [Contacting Staff](#)

Table of Contents

- ▶ [“About” tab](#)
- ▶ [Logging out](#)