

# vTools and OU Analytics Training

*March 12, 2022*

*Hosts and co-sponsors: Region 2, Region 6, Northern Virginia Section, EDS society*

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*Region 6 Information Mgmt. Co-coordinator; MGA ITCO Committee*

# Important notes

- ▶ Thank you for being an IEEE volunteer!
- ▶ Today's presentation will be recorded
- ▶ Today we'll cover **vTools** and **OU Analytics** for section, chapter, affinity group, and student branch volunteers



- ▶ Depending on your role, you may also need to use IEEE financial tools and other tools that aren't covered today
- ▶ Type your questions into the chat window or raise hand to be unmuted
- ▶ Today's slides and recordings are at <https://bit.ly/vtools-tng-March-2022>

# Why use vTools and OU Analytics?

- ▶ Spend less time on administration of local activities:
  - Set up events
  - Send newsletters, announcements, and reminders
  - Maintain a website
  - Conduct elections
- ▶ Help you in member development:
  - Know your members and membership trends
  - Survey your members
- ▶ Fulfill MGA non-financial reporting requirements:
  - Report new officers and officer changes
  - Report meeting activity
  - (Student branches) File student branch plans

# Who can access vTools?

Access is automatically granted to the following (partial list):

- ▶ Section, Chapter, Affinity Group Executive Committee Members
  - Chair, Vice Chair, Secretary, Treasurer
- ▶ Membership Development (MD) Chair
- ▶ Student Branch Executive Committee Members
  - Includes Advisor, Counselor
- ▶ Newsletter editors and webmasters
  - *Does not require active IEEE membership*
- ▶ Additional individuals at discretion of your OU chair:
  - vTools Coordinator
  - eNotice Coordinator - access limited to eNotice only
  - SAMIEEE Recipient – access granted to OU Analytics too

# vTools website

<https://vtools.ieee.org> (quick tip: Google "ieee vtools")

## IEEE MGA vTools

The screenshot shows the IEEE MGA vTools website. At the top right is the IEEE logo. Below it is a search bar with the text "ENHANCED BY Google" and a magnifying glass icon. A red arrow points from the search bar to the text "Search – results from vTools website". Below the search bar is a navigation menu with links: HOME, TOOLS, TUTORIALS, FAQ, BLOG, FEEDBACK, and CONTACT. A red arrow points from the BLOG link to the text "Blog – announcements, release notes, 'how to'". Below the navigation menu is a "Quick Links" section. A red arrow points from the text "Quick Links – opens selected tool" to this section. The "Quick Links" section contains a list of links: IEEE Membership Validator, vTools eNotice, vTools Events, vTools Officer Reporting, vTools Student Branch Reporting, vTools Voting, Doodle, IEEE Events Finder (Android), IEEE Events Finder (iOS), IEEE OU Analytics, IEEE Web Hosting, Other Volunteer Tools, Remote Conferencing, Survey Access Request Form, and WebEx Request Form.

HOME TOOLS TUTORIALS FAQ BLOG FEEDBACK CONTACT

ENHANCED BY Google

Quick Links

- «« IEEE Membership Validator
- «« vTools eNotice
- «« vTools Events
- «« vTools Officer Reporting
- «« vTools Student Branch Reporting
- «« vTools Voting
- » Doodle
- » IEEE Events Finder (Android)
- » IEEE Events Finder (iOS)
- » IEEE OU Analytics
- » IEEE Web Hosting
- » Other Volunteer Tools
- » Remote Conferencing
- » Survey Access Request Form
- » WebEx Request Form

**Search** – results from vTools website

**Quick Links** – opens selected tool

[Tools](#) - brief description of each tool

[Tutorials](#) – large set of PDFs and video walkthroughs

[Contact](#) - email MGA IM staff

[Blog](#) - announcements, release notes, 'how to'



## Officer Reporting

- Update organizational roster
- Add vTools Coordinator, eNotice Coordinator, or SAMIEEE recipient
- View current roster and log of changes
- Enables volunteers to receive role-specific emails and to access vTools and OU Analytics
- Update Organizational Unit website URL  
Example: <https://site.ieee.org/boise/>

IEEE vTools OFFICER REPORTING

Successfully changed active Organizational Unit

Unit: Chile Section (000001) [Select another OU to manage](#)

### MANAGE OFFICERS

Instructions

Please make changes for the officer positions for the selected organizational unit below.  
(show more)

[Add Officer](#) [End Term](#) [Request a new officer position](#)

Position Title	Current and Newly Elected Volunteers
Awards & Recognition Committee Chair	Manuel Duarte
Chair	Gaston Lefranc
Educational Activities	Victor Mascher, PE/UPR NORON
Membership Development	Roger Melado-Dapata
Newsletter Editor	
Nominations and Appointments Chair	

**NEW!** End date for a current officer can be updated

## Walkthrough: Report officer changes (1:12)





## Events

- Promote local, virtual, and hybrid meetings/events
- Collect registrations, may include admission fees
- Integrates with eNotice to communicate to members and event attendees
- Integrates with IEEE websites, IEEE mobile app, and Collabratic
- Complies with IEEE event policies and privacy protection
- Use it to report meetings to IEEE headquarters (L31 report)

### NEW!

- **Events Activity dashboard** – visual representation of events activity
- **My Events** – portal of your upcoming and past registrations
- **File report** – one click to submit one report for all hosts
- **Virtual Information** – more info can be saved in this section
- **URL obfuscation (Webex only)**



## **vTools Events walkthrough: Set up your meeting (4:28)**



## eNotice

- Send newsletters, meeting notices, social events, and more to members
- Send reminders and conference materials to event attendees
- Express delivery within two hours
- Personalization of messages (i.e. first name, last name)
- Events-eNotice integration  
*Create eNotice from Event information*
- Compliant with privacy and member communication preferences

IEEE vTools **eNOTICE**

[VTOOLS](#)
[MANAGE ENOTICES](#)
[HELP](#)
[CONTACT](#)

Welcome, Chris Gunning

Create eNotice

Santa Clara Valley

Select All/None

☐ Draft
 ☒ Submitted
 ☒ Pending
 ☒ Sent
 ☐ Canceled

Per Page 10

1 2 3 4 5 ... Next > Last »

Displaying eNotices 1 - 10 of 458 in total

Subject	Recipients	Status	Updated v	Send By	Reminder By	Priority	Type	
SCV Section Election Candidates Selected	R60369	Sent	16 Sep 2020 12:31 AM	16 Sep 2020		Normal	Express	<a href="#">Manage</a>
Reminder: SCV SSIT Virtual Chapter Meeting, September 16, 2020	CH06326	Sent	08 Sep 2020 08:31 PM	09 Sep 2020		Normal	Express	<a href="#">Manage</a>
mHealth4Afrika – Strengthening Healthcare Delivery in Resource Constrained Environments	CH06326	Sent	08 Sep 2020 04:01 PM	08 Sep 2020	07 Oct 2020	Normal	Express	<a href="#">Manage</a>
Reminder: mHealth4Afrika – Strengthening Healthcare Delivery in Resource Constrained Environments	CH06326	Submitted	08 Sep 2020 01:30 PM	07 Oct 2020		Normal	Express	<a href="#">Manage</a>
DEADLINE: Sep 15 for 2020 IEEE R6 Awards Nominations	R60369	Sent	04 Sep 2020 09:31 PM	04 Sep 2020		Normal	Express	<a href="#">Manage</a>
Reminder: How Radar Helped Win World	R6	Sent	26 Aug 2020 02:31 PM	26 Aug 2020		Normal	Express	<a href="#">Manage</a>

## NEW!

- **OU Officers mailing filter (Express enotices only)** – option to select officers of an OU as the recipients
- **Statistics** – view mailing statistics for Express eNotices (#sent, #opened, #clicked)

## **vTools Events and eNotice walkthrough: Send your meeting notice (1:57)**

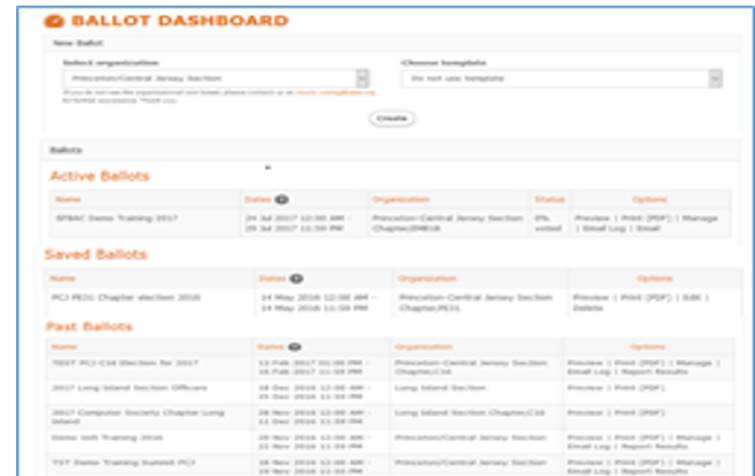
## **vTools Events and eNotice walkthrough: Manage your meeting (2:04)**

## **vTools Events walkthrough: File your meeting report (0:52)**



## Voting

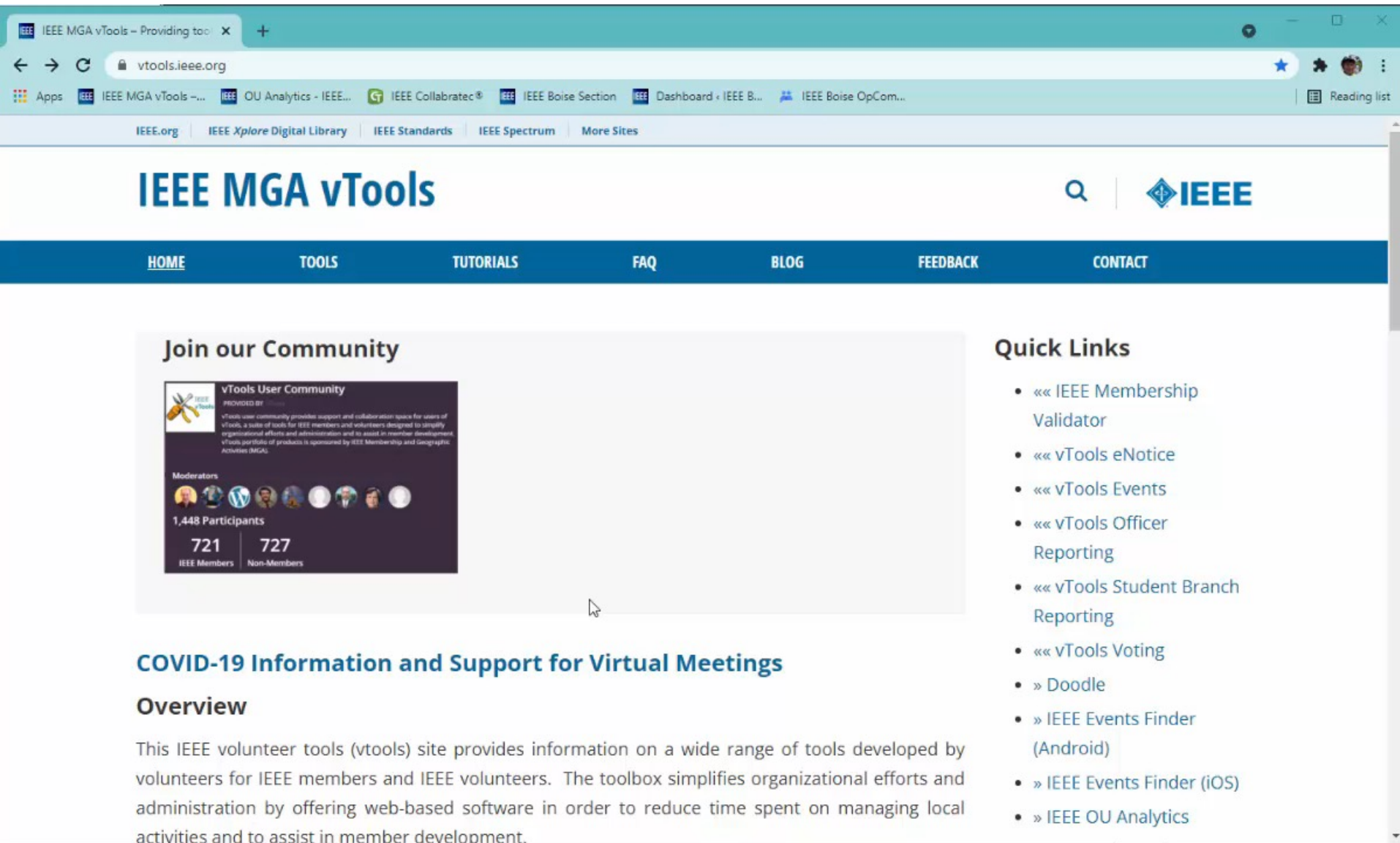
- Create ballot for local geo unit election
  - ✓ *Section, Chapter, Affinity groups, Student Branches*
  - ✓ *Please note this is different from the general IEEE elections*
  
- Features & benefits:
  - ✓ *Dashboard of active, draft, and past ballots*
  - ✓ *Online ballot available 24 x 7 worldwide*
  - ✓ *Auto-load voter list of eligible members*
  - ✓ *Organizer emails voters directly from the tool*
  - ✓ *Can also be used for motions*
  - ✓ *Members sign in with IEEE account for secure access to online ballot*
  - ✓ *Easy to use*
  - ✓ *Looks professional*



**NEW!**

- Ballots and motions now include explicit option to abstain

# vTools Voting walkthrough: Set up a candidate ballot (2:15)



The screenshot shows the IEEE MGA vTools website. The browser address bar displays 'vtools.ieee.org'. The website header includes the IEEE logo and a search icon. The navigation menu contains links for HOME, TOOLS, TUTORIALS, FAQ, BLOG, FEEDBACK, and CONTACT. The main content area features a 'Join our Community' section with a graphic showing 'vTools User Community' provided by IEEE, 1,448 participants, and 721 IEEE Members and 727 Non-Members. To the right is a 'Quick Links' section with a list of links. Below the community section is a 'COVID-19 Information and Support for Virtual Meetings Overview' section.

## Join our Community

**vTools User Community**  
PROVIDED BY IEEE

vTools user community provides support and collaboration space for users of vTools, a suite of tools for IEEE members and volunteers designed to simplify organizational efforts and administration and to assist in member development. vTools portfolio of products is sponsored by IEEE Membership and Geographic Activities (MGA).

**Moderators**

1,448 Participants

721 IEEE Members | 727 Non-Members

## Quick Links

- «« IEEE Membership Validator
- «« vTools eNotice
- «« vTools Events
- «« vTools Officer Reporting
- «« vTools Student Branch Reporting
- «« vTools Voting
- » Doodle
- » IEEE Events Finder (Android)
- » IEEE Events Finder (iOS)
- » IEEE OU Analytics

## COVID-19 Information and Support for Virtual Meetings Overview

This IEEE volunteer tools (vtools) site provides information on a wide range of tools developed by volunteers for IEEE members and IEEE volunteers. The toolbox simplifies organizational efforts and administration by offering web-based software in order to reduce time spent on managing local activities and to assist in member development.







## Student Branch Reporting


- Student Branch Officers submit annual plan including funding information, activity summary, and goals for upcoming year.
- Student branch chair, counselor, section chair, and region student representative provide approval of submitted plans

### SEARCH SUBMITTED PLANS

Search Options

School 

Region 

Reporting Year 

Region 1

2019

Search

Clear

Showing 11 of 11 based on search criteria.

Download

School Name	Code	Region	Reporting Year	Plan Name	Last Updated	Signatures	Action
New York State Univ Of-Stony Brook	STB06441	R1	2019	IEEE SBU Chapter Plan ('18-'19)	18 May 2019	Electronically signed by branch Chair, Alwin P. Joseph, on 18 May 2019	 
Univ Of Rhode Island, EMB18	SBC01621A	R1	2019	EMB URI 2019 Plan	15 Feb 2019	Electronically signed by branch Chair, Vanessa Kamara, on 15 Feb 2019	 

## **Student Branch Reporting walkthrough: File student branch plan (1:33)**



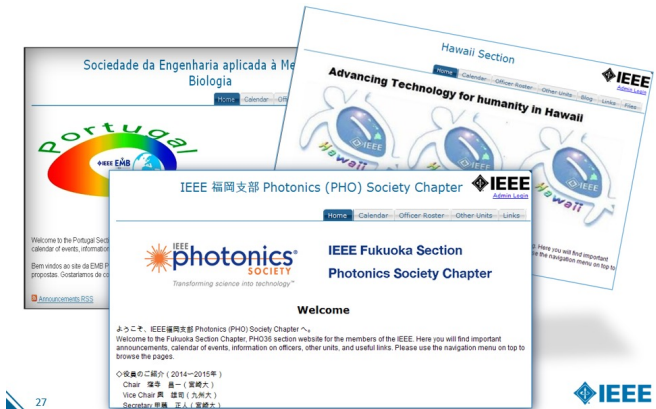
## Does your OU need a website?

### Option 1: Entity Web Hosting (EWH)

- WordPress hosting for OUs that want to create and maintain their own websites on an IEEE host
- OU expected to have a webmaster to manage content
- See <https://site.ieee.org/> for more details

### Option 2: WebInABox

- Generate a simple website using wizard-like interface – no webmaster needed
- Enables a common look and feel compliant with IEEE web presence guidelines
- Web site calendar page and officer roster page are automatically updated
- Supports Sections, Chapters, Affinity Groups and **Student Branches -New!**





## Membership Validator

- Validate an individual's membership status with IEEE
- Useful when providing event discounts

## Walkthrough: Verify IEEE Membership status (0:40)



## Xtreme

- IEEE Xtreme is a global challenge in which teams of IEEE Student members—advised and proctored by an IEEE member, and often supported by an IEEE Student Branch—compete in a 24-hour time span against each other to solve a set of programming problems
- IEEE Xtreme will take place in October
- vTools provides registration process for teams and proctors. Registration opens in August





## New vTools applications

[Local Groups](#): Request formation of a new informal group in your Section. Perhaps there is a lot of interest in Blockchain or avid HAM Radio operators. Form a Local Group to get like minds together.

[Nominations](#): Enables Section volunteers to manage the nomination/petition process with a step by step, easy to follow process.



# IEEE OU Analytics

<http://www.ieee.org/ouanalytics>

- ▶ Provides access to IEEE membership statistics as well as member information for your unit
- ▶ Access is based on the volunteer's position and Organizational Unit (OU)
  - **Sections:** Chair, vice chair, secretary, treasurer, MD and SAC chairs
  - **Chapters, Joint Chapters, and Affinity Groups:** Chair
  - **Student branches:** Branch chair and counselor
  - Recipients can be added upon request
- ▶ User will only obtain data for their OU and position level
- ▶ **Use must be in accordance with IEEE Data Access and Use Policy**
  - Member information can only be used for approved IEEE business
  - It may not be furnished to outside entities

## NEW!

- ▶ **Expanded access for all volunteers**
  - Access the Map module, Doublet dashboard, and memberships and subscriptions monthly statistics
- ▶ **"OK to contact"** field has been consolidated

## IEEE OU Analytics



> [Learn more about IEEE OU Analytics](#) > [Membership and Subscriptions Monthly Statistics](#)  
> [IEEE Conference Analytics](#)

Note: Data displayed is based upon volunteer access privileges. Data made available through this platform is IEEE Confidential Information. Please review the [IEEE Guide to Classification of Documents policy](#) for more information.

IEEE member data is released for use only by IEEE members, officers, and committee members. Member information may not be furnished, with or without compensation, to outside entities, or be used by IEEE members for any other than approved IEEE business.

It is the responsibility of the volunteer to keep informed of IEEE Policies governing mailings and the use of labels and email addresses, including the regulations governing electioneering for IEEE offices. The information is found in Section 14.1 of [IEEE Policies](#) published every January and is available on request or from the [IEEE Governing Documents](#) website.

It is also the responsibility of the volunteer to keep informed of the IEEE member [Privacy and Security policies](#) and [Email Terms and Conditions](#).

## **OUA walkthrough: Know your members and membership trends (5:43)**

# OU Analytics User Group

## ▶ OU Analytics User Group

- Purpose: identify the **top issues** affecting user productivity, and provide a communication path between users and IEEE staff
- Meets **once a month** via WebEx
- If you are interested in participating, contact me

## ▶ IEEE Collabratec Workspace: [IEEE OU Analytics](#)

- Q&A forum
- Meeting announcements, meeting notes, and related material from user group

# Other Tools/Resources not covered today

What do you want to do?	Tool / Resource	Link
Survey your members	SurveySparrow	<a href="https://site.ieee.org/vtools/survey-access-request-form/">https://site.ieee.org/vtools/survey-access-request-form/</a>
Request Virtual Meeting platform	WebEx request form	<a href="https://vtools.ieee.org/webex-registration/">https://vtools.ieee.org/webex-registration/</a>
Maintain eMail List	IEEE ListServ	<a href="https://listserv.ieee.org/">https://listserv.ieee.org/</a>
Set up workspace to collaborate	IEEE Collabratec	<a href="https://ieee-collabratec.ieee.org/">https://ieee-collabratec.ieee.org/</a>
Publish technical webinar recordings	IEEE.tv	<a href="https://ieeetv.ieee.org/">https://ieeetv.ieee.org/</a>
Access IEEE rosters	IEEE OU Roster	<a href="https://www.ieee.org/about/volunteers/rosters.html">https://www.ieee.org/about/volunteers/rosters.html</a>
Financial services	IEEE NextGen, Concentration Banking (CB)	<a href="https://www.ieee.org/about/financials/nextgen/secure/index.html">https://www.ieee.org/about/financials/nextgen/secure/index.html</a>
Financial & Compliance Reporting	IEEE MGA Compliance Portal	<a href="https://mga.ieee.org/resources-operations/geographic-unit/reporting-rebates/financial">https://mga.ieee.org/resources-operations/geographic-unit/reporting-rebates/financial</a>
Volunteer Development	CLE, VoLT, MD, Treasurer, Student Branch Development	<a href="https://mga.ieee.org/volunteer-development">https://mga.ieee.org/volunteer-development</a>

# vTools/OU Analytics Resources

- People:

A few of the many volunteers:

Chris Gunning [cgunning@ieee.org](mailto:cgunning@ieee.org)

Taylor Winship (R6 Info Mgmt Co-Coordinator) [taylor\\_winship@att.net](mailto:taylor_winship@att.net)

Murty Polavarapu (EDS VP of Regions/Chapters) [murtyp@ieee.org](mailto:murtyp@ieee.org)

Marty Schulman (chair, MGA vTools committee) [schulman@tuffmail.com](mailto:schulman@tuffmail.com)

Ron Jensen (chair, MGA ITCO committee)

- MGA Information Management staff (Vera Sharoff and team)  
[mga-im@ieee.org](mailto:mga-im@ieee.org)

- Tools and training links:

- vTools: <https://vtools.ieee.org/>
- vTools tutorials: <https://vtools.ieee.org/training>
- OU Analytics: <http://ieee.org/ouanalytics>

- This presentation: <https://bit.ly/vtools-tng-March-2022>

# Q&A

# Thank you!



# Backup slides

# vTools Support – Organizational Units

<b>vTools Application</b>	<b>Region</b>	<b>Council</b>	<b>Section / Subsection</b>	<b>Chapter / Joint Chapter</b>	<b>Affinity Group</b>	<b>Student branch (includes chapters/ affinity groups / HKN)</b>
<b>Events</b>	Yes	N/A	Yes	Yes	Yes	Yes
<b>eNotice</b>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Officer Reporting</b>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Voting</b>	Yes	N/A	Yes	Yes	Yes	Yes
<b>WebInABox</b>	Yes	N/A	Yes	Yes	Yes	Yes
<b>Student Branch Reporting</b>	N/A	N/A	N/A	N/A	N/A	Yes – Student branches only

# vTools and OU Analytics Summary

What do you want to do?	Tool / Resource	Link
Report new officers and officer changes	vTools Officer Reporting	<a href="https://officers.vtools.ieee.org">https://officers.vtools.ieee.org</a>
Set up a meeting Track registration Report meeting activity	vTools Events	<a href="https://events.vtools.ieee.org">https://events.vtools.ieee.org</a>
Send a meeting notice Send newsletters and announcements Send emails to meeting registrants	vTools eNotice	<a href="https://enotice.vtools.ieee.org/">https://enotice.vtools.ieee.org/</a>
File student branch plan	vTools Student Branch Reporting	<a href="https://sbr.vtools.ieee.org/">https://sbr.vtools.ieee.org/</a>
Conduct voting – set up a candidate ballot	vTools Voting	<a href="https://voting.vtools.ieee.org">https://voting.vtools.ieee.org</a>
Know your members and membership trends	OU Analytics	<a href="http://www.ieee.org/ouanalytics">http://www.ieee.org/ouanalytics</a>

# Other Tools Discussed Today

What do you want to do?	Tool / Resource	Link
Build a website	Entity Web Hosting Web In a Box	<a href="http://site.ieee.org/">http://site.ieee.org/</a> <a href="https://webinabox.vtools.ieee.org">https://webinabox.vtools.ieee.org</a>
Verify IEEE Membership status	Membership Validator	<a href="http://www.ieee.org/mv">http://www.ieee.org/mv</a>