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
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”)

**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/

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 Collabratec
- 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)
**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

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)

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

<table>
<thead>
<tr>
<th>What do you want to do?</th>
<th>Tool / Resource</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey your members</td>
<td>SurveySparrow</td>
<td><a href="https://site.ieee.org/vtools/survey-access-request-form/">https://site.ieee.org/vtools/survey-access-request-form/</a></td>
</tr>
<tr>
<td>Request Virtual Meeting platform</td>
<td>WebEx request form</td>
<td><a href="https://vtools.ieee.org/webex-registration/">https://vtools.ieee.org/webex-registration/</a></td>
</tr>
<tr>
<td>Maintain eMail List</td>
<td>IEEE ListServ</td>
<td><a href="https://listserv.ieee.org/">https://listserv.ieee.org/</a></td>
</tr>
<tr>
<td>Set up workspace to collaborate</td>
<td>IEEE Collabratec</td>
<td><a href="https://ieee-collabratec.ieee.org/">https://ieee-collabratec.ieee.org/</a></td>
</tr>
<tr>
<td>Publish technical webinar recordings</td>
<td>IEEE.tv</td>
<td><a href="https://ieeetv.ieee.org/">https://ieeetv.ieee.org/</a></td>
</tr>
<tr>
<td>Access IEEE rosters</td>
<td>IEEE OU Roster</td>
<td><a href="https://www.ieee.org/about/volunteers/rosters.html">https://www.ieee.org/about/volunteers/rosters.html</a></td>
</tr>
<tr>
<td>Financial services</td>
<td>IEEE NextGen, Concentration Banking (CB)</td>
<td><a href="https://www.ieee.org/about/financials/nxtgen/secure/index.html">https://www.ieee.org/about/financials/nxtgen/secure/index.html</a></td>
</tr>
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<td>Volunteer Development</td>
<td>CLE, VoLT, MD, Treasurer, Student Branch Development</td>
<td><a href="https://mga.ieee.org/volunteer-development">https://mga.ieee.org/volunteer-development</a></td>
</tr>
</tbody>
</table>
vTools/OU Analytics Resources

• People:
  A few of the many volunteers:
  Chris Gunning cgunning@ieee.org
  Taylor Winship (R6 Info Mgmt Co-Coordinator) taylor_winship@att.net
  Murty Polavarapu (EDS VP of Regions/Chapters) murtyp@ieee.org
  Marty Schulman (chair, MGA vTools committee) schulman@tuffmail.com
  Ron Jensen (chair, MGA ITCO committee)
  
  • MGA Information Management staff (Vera Sharoff and team)
    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
Thank you!
Backup slides
# vTools Support – Organizational Units

<table>
<thead>
<tr>
<th>vTools Application</th>
<th>Region</th>
<th>Council</th>
<th>Section / Subsection</th>
<th>Chapter / Joint Chapter</th>
<th>Affinity Group</th>
<th>Student branch (includes chapters/affinity groups / HKN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>Yes</td>
<td>N/A</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>eNotice</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Officer Reporting</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Voting</td>
<td>Yes</td>
<td>N/A</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>WebInABox</td>
<td>Yes</td>
<td>N/A</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>Student Branch Reporting</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>Yes – Student branches only</td>
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## vTools and OU Analytics Summary

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<td>Set up a meeting</td>
<td>vTools Events</td>
<td><a href="https://events.vtools.ieee.org">https://events.vtools.ieee.org</a></td>
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<td>Track registration</td>
<td></td>
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<td>Report meeting activity</td>
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<td>Send a meeting notice</td>
<td>vTools eNotice</td>
<td><a href="https://enotice.vtools.ieee.org/">https://enotice.vtools.ieee.org/</a></td>
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<td>Send newsletters and announcements</td>
<td></td>
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<tr>
<td>Send emails to meeting registrants</td>
<td></td>
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<tr>
<td>File student branch plan</td>
<td>vTools Student Branch Reporting</td>
<td><a href="https://sbr.vtools.ieee.org/">https://sbr.vtools.ieee.org/</a></td>
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<tr>
<td>Conduct voting – set up a candidate ballot</td>
<td>vTools Voting</td>
<td><a href="https://voting.vtools.ieee.org">https://voting.vtools.ieee.org</a></td>
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<td>Know your members and membership trends</td>
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Other Tools Discussed Today

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