IEEE OU Analytics

*Powered by Tableau*

- Tableau is an Online Business Analytics tool that allows users to view and further define visualizations based on IEEE data.
- Tableau uses the same data source used by IEEE Renewal, Collabratec, the vTools Applications....

IEEE OU Analytics

A visual business intelligence tool for volunteer access to member data

<< Access IEEE OU Analytics >>

Use of IEEE OU Analytics must be in accordance with the IEEE Data Access and Use Policy.

Important Announcement
Due to scheduled maintenance, OU Analytics will be unavailable on Friday, January 10, 2020 from approximately 10:00 a.m. to 11:00 a.m. (EST)

Training
Click here to view the training materials

New Features
12/19/19: The "Volunteer Positions" Dashboard has a new enhancement.
  * Volunteer History is now a separate tab and no longer a link.
  * Additional filters have been created for "Region" and "Section" on all tabs.
    - Use the "OU Type" filter to select the type (Example: "Region")
    - Then use the Region filter to select the Region you wish to view.
  * This will narrow down the available list in the Section filter.
  * When using the Region filter, if you wish to also view the Vacant Positions, you must select "Vacant" in the dropdown list.
    - If you do not use the Region Filter, then Vacant Positions will automatically be selected.
IEEE OU Analytics
http://www.ieee.org/ouanalytics

- Access is based on the volunteer position and Organizational Unit (OU) ie: Section, Chapter, Society, region etc... A list of authorized volunteer positions are available.

- You can find any important announcements, such as scheduled downtime.

- Reference materials are available.

- Training materials are available.

- Go to the Questions & Answers page. Find your question, click on it and it will bring you to step by step answers.

- Find out what new features are available.
IEEE OU Analytics - Terms and Conditions

Conditions of data availability and use

- 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.
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Sign in

- IEEE web Account User Name and Password

IEEE - Sign in to access the secure content

Sign in

Email address:
jsmith@ieee.org

Password:
*********

> IEEE Members: Forgot password
> IEEE Employees: Forgot username or password

Sign in
IEEE OU Analytics

- Members and Affiliates: Overview of geographic organizational unit members and participants
- Students: Overview of students by geographic organizational unit and educational institution
- Volunteer Positions: Current organizational unit volunteers including volunteer history
- Memberships (Societies, TCs, Affinities), Subscriptions, and More: Memberships, subscriptions, and participations by region, grade, gender, years of service, and renewal category
- Doublet: Overlapping memberships of organizational units
- Map: Geographic display of organizational units and counts

Learn more about IEEE OU Analytics
Memberships and Subscriptions Monthly Statistics
IEEE Conferences

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.
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The landing page is divided into six areas

- **Members and Affiliates**
  - Provides an overview of the geographic organizational unit (OU) and members.
    - Member Lookup by Region, Section and Subsection, contact information, grade, gender, HKN status.
    - Geographic zip code counts by Region, Section, City, State or Country
    - Employer Information including Employer name, business, job function and responsibility, etc. Filters are available for Region, Section, Grade, IEEE Status. Member and Employer Name.
    - IEEE Member Activity – new IEEE Memberships and Members moving into OU, filtering by date periods.

- **Memberships (Societies, TCs, Affinities), Subscriptions and More ...**
  - Provides information regarding memberships, subscriptions, and participations by region, grade, gender, years of service, renewal category and renewal summary.
    - Filter by Product Type, Product Name, Region, Grade, Status, Renewal Category and Years of Service.

- **Students**
  - An overview of attending students (all grades) by Section and School.
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The landing page is divided into six areas

- **Doublet**
  - View of overlapping memberships. IEEE wide with filters for Region, Section and Grade.

- **Volunteer Positions**
  - Current OU volunteers and volunteer history.

- **Map**
  - Geographic display of organizational units and counts
  - Information available
    - IEEE/Society Member counts
    - Chapter Summary and Chapter Member Counts
    - Affinity Group Summary
    - Student Branch Summary
    - Potential Chapters and Potential Student Branches
IEEE OU Analytics  How to navigate the dashboards

- On the dashboard pages (example: “Memberships, Subscriptions & More” link.) users will see . . .
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Navigating the Dashboards . . .

▸ Tool Tip: Provides another option for filtering visualizations. Click on the data point and then hover over the filtered area. A tool tip will appear and you can choose one of the following:
- **Keep only** – keeps the selected data in the view, all other data will be removed.
- **Exclude** – excludes the data from the view, all other data will be retained.
- **View Detail** – launches Detail View, which provides a list of the chosen data with detail information.

▸ To clear the filter in the Tool Tip, click “Undo” at the top of the page and then click within white space to return the visualization to its original display.
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Navigating the Dashboards . . . (Tool Tip)

Click on the Section. It will now be highlighted in blue. The Tool tip will appear allowing you to "keep only" the section highlighted and/or go directly to view the selected member details.
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Navigating the Dashboards . . .

- Expanding or Collapsing Columns: Hover over column headings of a data table to see the expand and collapse buttons, if available.
  - Click the plus sign to expand the column
  - Click the minus sign to collapse the column; the plus sign will then appear
  - Click Revert button to return to where you started.
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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.

- To download any view click on the Download button on the top right of the screen. The following options are available:
  - **Image** – downloads the image on your screen to a png file.
  - **Crosstab** – (recommended download option) downloads the data to a csv file.
  - **PDF** – downloads the image on the screen to a PDF file.
  - **Powerpoint** – downloads the full screenshots of the dashboard into a powerpoint presentation.

- Select Crosstab to download to excel or csv (tab delimited) format. If you wish the data to be easily manipulated/sorted/etc, select “csv”. This places data in individualized fields. Downloading directly into Excel can produce fields that are merged due to identical data.
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Downloading Data for any view

Memberships, Subscriptions, and More - Product Dashboard
This dashboard provides interactive views for memberships, communities, councils, online libraries, and periodicals. Product Type of "Memberships" is preselected.
- 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.
- Important: Choose an OU from "Select OU of your Volunteer Role" filter to view customized results for your OU position.

Select which View you want to download,

Select which format you wish to download the data.
### IEEE OU Analytics

#### Downloading Data (continued)

Here are examples of fields merging when downloading directly into Excel and fields downloaded directly in CSV (Tab Delimited). All data is downloaded into individual fields.
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Questions & Assistance

› If you have any questions regarding the tool or need further assistance send an email to ouanalytics@ieee.org

› Here are additional contacts:

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