Making the most of IEEE vTools

Vera Lee Sharoff
4 August 2014
Agenda

- vTools Overview
- New eNotice application
- vTools meetings: enabling meeting registration for chapters
- vTools Voting
- Section Vitality Dashboard and how it can be used for Chapters
- Q/A
vTools Overview
vTools Overview

- vTools are simply Volunteer tools
- Conceived by MGA volunteers and sponsored by IEEE MGA and IEEE IT
  - Toolbox is intended to simplify administration by offering web based applications to manage volunteer activities.
  - Some are “home grown” (Meetings, Voting, Officer Reporting, WebInABox)
  - Some are commercial (WebEx, Surveys)
IEEE MGA vTools

vTools Mission

Providing tools to the volunteers and staff who support our members.

Quick Links
- Create a WebInABox site
- Report officer changes
- Schedule a Meeting
- Section Vitality Dashboard
- Setup a Survey
- Setup a Web Conference
- Setup an election
- Submit an eNotice request using the new tool

Home

vTools are developed and made possible by IEEE volunteers. The toolbox simplifies administration by offering web based software, reduces time spent managing activities, and assists in member development. vTools is sponsored by IEEE Membership and Geographic Activities (MGA). MGA serves the needs of IEEE members by supporting IEEE Sections.
**vTools.Meetings**
Meetings is used for managing section and chapter meetings. Officers can create meeting announcements with no dependence on webmaster availability and show them on your website. Event registration with or without credit card payments is available.

**vTools_OFFICERReporting**
OFFICERReporting is an online officer reporting tool. It enables authorized volunteers to submit officer reporting with automatic validation and updates the central IEEE database. Volunteers can view/add/remove/update officers.

**vTools.StudentBranchReporting**
Student branches can submit annual plan and report of activities.

**vTools.Voting**
Voting enables online officer elections for sections/chapters/affinity groups. Please note that this is different from the general IEEE elections.

**vTools.WebInABox**
WebInABox uses a wizard to generate simple section/chapter/affinity group websites that are automatically updated.

**eNotice**
IEEE eNotice is an electronic newsletter subscription service that has been developed for IEEE organizational units to facilitate email distribution of newsletters, meeting notices, social events and IEEE conference materials.

**FluidSurveys**
MGA sponsors this survey tool for regions/sections/chapters/affinity groups. The tool can be used to quickly create online surveys using intuitive interface and distribute them via e-mail, web link, etc.

**ReviewRoom**
ReviewRoom is a tool used to collect, organize and evaluate online applications and submissions quickly and efficiently. Use for Awards & Nominations, Competitions, Scholarships & Grants applications. Contact us to learn more and get access.

**SAMIEEE**
Web-based ad hoc query tool that provides volunteers access to member data. It allows ad hoc querying, reporting, and downloading of IEEE's membership data to authorized or designated IEEE volunteers.

**Web Conferencing**
IEEE MGA sponsors web conferencing services for geographic organizational units to conduct online meetings, webinars, training, demos and presentations. The service is available to MGA Board members and MGA Board Committees as well as region and section EXCOM officers.

**Section Vitality Dashboard**
The Section Vitality Dashboard provides a monitoring tool for use by section leaders that provides real-time, top-down status view of their section vitality metrics and key activities.
New: eNotice Web Application

- eNotice Web application will replace existing form for most eNotice submissions*
- Provides a content management system to create, save and submit requests
- Pilot link has been added to the existing eNotice web page
- Chapter Chairs have automatic access. Others can be easily added as "eNotice Coordinators"
  - Send an email request to vtools@ieee.org

* Conferences coming in a later phase
IEEE eNotice Service

IEEE eNotice is an electronic newsletter subscription service that has been developed for IEEE organizational units to facilitate email distribution of newsletters, meeting notices and IEEE conference materials.

The source of email addresses for eNotice is the IEEE Membership Database, new members are automatically added, members who move to a new Section are automatically moved, and past members are excluded by default.

Each message gives the member an opportunity to opt-out of future eNotices.

When an IEEE officer requests an eNotice, it is sent to the organizational unit (OU) to which that officer belongs (e.g., when IEEE Boston PES Chapter Chair requests an eNotice, it is sent to IEEE Boston PES Chapter members only).

Please use the IEEE conference eNotice form for conference eNotices.

Please log in to continue using the system. If you need help please click here to view a tutorial.

Note: Please ensure that you use your IEEE member web account to log in. If you do not recall your web account information, or aren’t sure you have one, you may go to http://www.ieee.org/web/accounts to recover your account information.
Welcome to the IEEE vTools eNotice System

- For critical eNotice requests (e.g., cancellations), please be certain to select, “Yes” for the “Is this request critical?” field. We will do our best to accommodate your critical requests during normal business hours.
- IEEE organizational units using this service are strongly encouraged to limit mailings to one per week.
- Processing time can be up to 5 business days due to the volume of requests we receive daily.
- To use eNotice, you must be an officer of the organizational unit to which you want to send notices. If you are an officer of the organizational unit and your information does not appear in the online rosters, please submit your officer information to http://officers.vtools.ieee.org. If your officer position does not appear in the online rosters, approval from the appropriate officers would be required.

Click on the tab labeled “List of eNotices” to view all eNotices for an organizational unit and/or to create an eNotice.

Conferences – At this time we are not supporting Conference eNotices. Please click here for Conference eNotice submission form.
eNotice

CREATE eNotice

<table>
<thead>
<tr>
<th>Mailing Subject</th>
<th>Created</th>
<th>Region</th>
<th>Section</th>
<th>Target OUs</th>
<th>Status</th>
<th>Last Status Update</th>
<th>Owner</th>
<th>Send By</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>IEEE Savannah Sec</td>
<td>08/04/2014</td>
<td>R3</td>
<td>R30061</td>
<td>R30061</td>
<td>Draft</td>
<td>08/04/2014 01:21PM</td>
<td>Vera Lee Sharoff</td>
<td>08/18/2014</td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries
Add eNotice

*Subject:* eNotice id 182

*To:* R30061 (Savannah Section)

Membership: All IEEE members
Grades:

Membership Status: Active

Additional Flags: None

Special Requests:
Comments/Special Requests for eNotice admins.

Attachments:

*Send By:* 08/18/2014

Reply to: no-reply@ieee.org

Priority: Normal

Privacy: Private Mailing

Schedule Reminder: mm/dd/yyyy

* Required Fields
Add eNotice

Section Social - Save the Date!
## eNotice

### List of eNotices

- **Create eNotice**

#### Displayed eNotices

<table>
<thead>
<tr>
<th>Mailing Subject</th>
<th>Created</th>
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<td></td>
</tr>
<tr>
<td>Section Announcement</td>
<td>08/04/2014</td>
<td>R3</td>
<td>R30061</td>
<td>R30061</td>
<td>Draft</td>
<td>08/04/2014 01:31PM</td>
<td>Vera Lee Sharoff</td>
<td>08/18/2014</td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries

First Previous 1 Next Last
### List of eNotices

<table>
<thead>
<tr>
<th>Mailing Subject</th>
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<td>08/04/2014</td>
<td>R3</td>
<td>R30061</td>
<td>R30061</td>
<td>Submitted</td>
<td>08/04/2014 01:49PM</td>
<td>Vera Lee Sharoff</td>
<td>08/18/2014</td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries
vTools eNotice

- The eNotice is processed by staff using the IEEE Campaign tool
- Once the emailing is complete, the status will change to “Sent”
vTools Meetings
Welcome to the IEEE vTools Meeting System
Please select from the following options:

About the vTools Meeting System

Find Meetings

Log in (vTools use IEEE Web Accounts as credentials -- update/create Web Account)
vTools Meetings

- Use Meetings for L31 (98% Sections)

- Use Meetings to schedule an upcoming meeting
vTools Meetings

- Automatic feeds into myIEEE, WebInABox, WordPress (coming by end of September) and the upcoming Professional Collaboration project
No meetings are currently available.
## Huntsville Section Chapter, CS23

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Title</th>
<th>Speaker(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>09 August 2014 06:30PM</td>
<td>IEEE Huntsville Section's 60th Year Anniversary - Dinner Cruise</td>
<td></td>
</tr>
<tr>
<td>21 August 2014 11:30AM</td>
<td>IEEE Section Tour at the Huntsville Energy - Waste Electric Plant</td>
<td></td>
</tr>
</tbody>
</table>
vTools Meetings

- If you use vTools Meetings to schedule an upcoming meeting, then almost all of the work is complete for the L31.
- Simply add attendance numbers and you’re done.
vTools Meeting Categories

We have also added more categories to identify the type of meeting:

- Technical
- Professional
- Non Technical
- Administrative

- Technical Development
- Professional Development
- Continuing Education
- Industry Relations
- Administrative
- Volunteer Training
- EXCOM meetings
- Non Technical
- Social
- Awards
- Pre University Activities
Find Meetings

- Actively working to promote the use of the “Find Meetings” feature in vTools.Meetings
Find Meetings: Distance Selection

Organizational Unit: [Dropdown]
Meeting date: 04 Aug 2014 14:11
Virtual?: [Checkbox] (show only virtual meetings)
Located: Within [Dropdown] of
Boston

Take care when specifying both Society and Region/Section/Organizational Unit search parameters. Location searches can be at/on or can specify an address or just city/state/country. When a location search is specified, any meetings without a location will not show in search results. Date searches should use the format '04 Aug 2014 14:29' (click calendar icon to select date/time).

Displaying 1-1 of 1 meetings found, sorted by Meeting Date.

<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Reg</th>
<th>Sec</th>
<th>Location</th>
<th>Virtual?</th>
<th>Distance</th>
<th>L31</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>IEEE Boston Section Executive Commit</td>
<td>18 Aug 2014</td>
<td>1</td>
<td>BOSTON</td>
<td>Woburn, Massachusetts</td>
<td>No</td>
<td>10.82 miles</td>
<td>No</td>
<td>Show</td>
</tr>
</tbody>
</table>

Download results as CSV

Map of Boston area with marked locations.
vTools Meetings

Meetings for registration?
- now supports chapters deposit to chapter concentration banking account*
- New Short URL is provided to the meeting description to allow you add a link to your website or eNotice

https://meetings.vtools.ieee.org/m/27547

* Requires chapter concentration banking account
IEEE Boston Section Executive Committee Meeting - August 18, 2014

The next IEEE Boston Section Executive Committee meeting will be held on Monday, August, 2014 at 6:00PM at the Crowne Plaza, 15 Middlesex Canal Park Road, Woburn, MA.

**Location:**
Building: Crowne Plaza
15 Middlesex Canal Park
Woburn, Massachusetts
United States 01801

**Date:** 18-August-2014
**Time:** 06:00PM to 08:00PM (2.00 hours) **All times are:** US/Eastern

Add Meeting to Calendar

Email meeting contact... Contact Linda or Bob Alongi at r.alongi@ieee.org

No Admission Charge.

Click Here to Register
vTools Voting
vTools Voting

- Enables online officer elections for Sections, Chapters and Affinity Groups
  - Functionality recently expanded to accommodate Technical Committees and Technical Councils
  - As of the end of August, the voter list will be created automatically
vTools Voting

vTools Voting is part of the vTools project which is developed and made possible by IEEE volunteers. This application was created to assist IEEE organizational units in conducting online elections.

Please log in to continue using the system. If you need help please click here to view a tutorial.

Note: Please ensure that you use your IEEE member web account to log in. If you do not recall your web account information, or aren’t sure you have one, you may go to: http://www.ieee.org/web/accounts to recover your account information.
New Ballot

Select organization: Dallas Section Chapter, EMC27

Choose template: Do not use template

Create

Active Ballots
There are no entries to display.

Saved Ballots
There are no entries to display.

Past Ballots

<table>
<thead>
<tr>
<th>Name</th>
<th>Dates</th>
<th>Organization</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>IEEE Dallas Section 2012 ExCom</td>
<td>January 10, 2012 22:00 – February 10, 2012 22:00 Central Time (US &amp; Canada)</td>
<td>Dallas Section</td>
<td>preview</td>
</tr>
<tr>
<td>IEEE CE Society President Election</td>
<td>May 08, 2010 00:05 – May 13, 2010 13:00 Eastern Time (US &amp; Canada)</td>
<td>IEEE Consumer Electronics Society</td>
<td>preview</td>
</tr>
</tbody>
</table>
New Ballot

Please enter ballot name: (up to 50 characters)

Please select time zone:
(GMT-05:00) Eastern Time (US & Canada)

Please select a starting and ending date and time for voting:
Open ballot on: August 05, 2014 12:00 AM
Close ballot on: August 05, 2014 11:59 PM

Please enter voter instructions: (up to 4000 characters)

Welcome to the <<Insert Ballot Name Here>> Election! I want to take this opportunity to personally express my sincere appreciation for you being an IEEE member!

Our duty and responsibility is to ensure that your voting rights are protected and that you are confident that your vote is accurately cast and tabulated. We will utilize the vTools Voting system for our elections.

Please select one candidate for each position or specify a write-in candidate.

Please don't hesitate to contact me at <<Insert Email Address Here>> if you have a question, comment, or complaint regarding your voting experience.

Thank you for voting – your vote counts!
Positions and candidates
Please enter positions and candidates (position titles can be up to 50 characters):

Add new position
Allow write-in candidate for each position: ☐

Voters
Voters currently loaded: 0
clear voter list

Load voter list
Load voters for OU: CH05038
To auto-load a list of voters, please enter your IEEE password: [Input field] Load
The Section Vitality Dashboard

- [http://www.ieee.org/vitalitydb](http://www.ieee.org/vitalitydb)
- Uses SAMIEEE (OBIEE)
- Dashboard reports are automatically generated
- Designed for Sections, but Chapter version is coming by December 2014
- Very good reception from Section leaders
Section Vitality Dashboard

The Vitality Dashboard shows the active member counts by grade, section, and region. The dashboard is filtered by Region Code 'R3' and Section Name 'Savannah Section'. The counts include Associate Member, Graduate Student Member, Life Fellow, Life Member, Life Senior, Member, Senior Member, and Student Member. The total count for the Savannah Section is 187 members.
Vitality Dashboard TABs

- Members and Affiliates
- Student Members
- Active Officers
- Officer History
- Affinity Group Members
  - Women in Engineering
  - Consultants Network
  - Young Professionals (formerly GOLD)
  - Standards Association
Meeting Activity

- Technical
- Professional – All
  - Continuing Education
  - Professional Development
  - Industry Relations
  - Uncategorized Professional
- Non Technical – All
  - Social
  - Awards
  - Pre-University Activities
  - Uncategorized Nontechnical
- Administrative – All
  - ExCom
  - Volunteer Training

Advanced Meeting Search
- with date ranges and meetings for Sections, Chapters and Affinity Groups
Your turn for questions
Contact Information

SAMIEEE
Helen Shiminsky
h.shiminsky@ieee.org
samieee@ieee.org

eNotice, EWH
Khanh Luu
k.n.luu@ieee.org

vTools
Marguerite Gargiula
m.gargiula@ieee.org
vtools@ieee.org

Membership Requirements Manager
Eugene Khusid
e.khusid@ieee.org

Vera Lee Sharoff
Director, MGA Information Management
v.sharoff@ieee.org
THANK YOU!
MGA Information Management at Sections Congress

- vTools exhibit table
- 18 Learning Labs dedicated to vTools and MGA Electronic Products
  - vTools Meetings 3
  - vTools Officer Reporting 2
  - vTools Voting 3
  - Intro to Web Hosting 1
  - vTools Surveys 1
  - vTools eNotice 3
  - Section Vitality Dashboard 3
  - Using WebEx Effectively 2

- 2 Ignite Sections (5 minute scripted timed sessions)