vTools Updates

Chris Gunning cgunning@ieee.org
MGA vTools Committee member, Region 6

R6 NEA Fall Meeting – Oct 13, 2018
Topics

IEEE WordPress Hosting Migration
Survey tool replacement
OU Analytics
Where to find more information, report problems, etc.
IEEE WordPress Hosting Migration

Sites hosted on sites.ieee.org will be migrated to more secure server for better security and performance

Notifications have been sent to list of known site owners

You must opt in ASAP for migration

Else your site will go dark after Dec 31st

A redirect will be set up to redirect traffic from your current site to your new site after it’s been migrated

If you have a custom domain, its CName will need to be updated later
Survey tool replacement update

Checkbox is FluidSurveys replacement
Accounts are created per request from vTools portal
54 accounts have been created so far
IEEE staff is using Checkbox as well
vTools.Events updates

▶ **@Event** is a new on-site registration feature
  - Available via Events web page; works on mobile devices too
  - View registrations
  - Add new registrations
  - Check-in attendees
  - Update registration information
  - For more details see [http://sites.ieee.org/vtools/event-enhanced-on-site-registration-using-a-mobile-tablet-device](http://sites.ieee.org/vtools/event-enhanced-on-site-registration-using-a-mobile-tablet-device)

▶ GDPR Compliance changes
  - Events registration includes IEEE Privacy Policy
  - Event Management includes Data Access and Use Policy consent for volunteers
vTools.Voting updates

- **Enhancements**
  - Added auto-load option for voter list
  - Updated links for required reporting for local election results and voter instructions

- **GDPR Compliance changes**
  - Removed voter status option
  - Voting Dashboard includes Data Access and Use Policy consent for volunteers
vTools.eNotice updates

- Expanded usage of eNotice to support Societies
- Added Express option for Student Branches and HKN Chapters
IEEE OU Analytics

What is OU Analytics

- In May, OU Analytics replaced SAMIEEE as the tool for volunteers to access membership data and statistics
  - OU Analytics is built on Tableau business intelligence tool
  - OU Analytics uses the same data sources used by SAMIEEE
  - Accessible via browser and mobile app

- Access is based on the volunteers’ position and OU.
  - User will only obtain data for their OU unit(s) and position level.
  - For a list of volunteer positions, go to: http://www.ieee.org/about/volunteers/samieee/samieee_positions.html

- OU Analytics allows users to view and further define visualizations based on IEEE membership data
  - Users can also download detailed data such as membership lists
OU Analytics updates

▸ Recent access issues
  - There were issues with the process that synchronizes user access to OU Analytics which impacted volunteer access for several days
  - All existing access to volunteers have been restored

▸ Staff adding missing functionality, improving FAQ page, and developing short “how-to” videos
  - See what's coming in the future

▸ OU Analytics User Group
  - Purpose: identify the top issues affecting user productivity, and provide a communication path between users and IEEE staff
  - Issues are added to vTools committee prioritized issue list
  - The user group is currently meeting twice a month via WebEx.
  - If you are interested in participating, contact Chris Gunning (cgunning@ieee.org) or Larry Hamerman (l.hamerman@ieee.org)

▸ IEEE Collabratec Group: IEEE OU Analytics
  - Foster communication between IEEE staff and volunteers
Finding more information

Learning about tools, reporting problems, getting help

Portal: http://sites.ieee.org/vtools (quick tip: Google “ieee vtools”)

- Home – overview, video introduction
- Tools – list and description of tools
- Tutorials – on-demand “quick start” web tutorials
- FAQ
- Blog – news and tips
- Feedback – submit feature requests and bug reports
- Contact – send message to vTools staff
Backup
IEEE OU Analytics

How to access

- Convenient link available on SAMIEEE Home Page at: https://mga.ieee.org/resources-operations/volunteer-tools/samieee

- Or access the Dashboard Landing Page directly at: https://tblanalytics.ieee.org/#/site/IEEE/views/LandingPage_0/LandingPage?:iid=1
IEEE OU Analytics

How to navigate the dashboards

› On the dashboard pages (example: “Members and Affiliates” link.) users will see . . .
IEEE OU Analytics

Now for a closer look at the individual dashboards
IEEE OU Analytics

Members and Affiliates Dashboard

- The Members and Affiliates Dashboard provides an overview of IEEE members, society affiliates, and SA members by their geographic organizational units.

- An overview count of members by Region, Council, Section and Subsection is available.
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Members and Affiliates - Dashboard

There are two tabs available.

- Dashboard – shows the predefined tables and charts available for a breakdown view of your members.
- Detail – contains the individual member information. Access the member information by clicking on “View Details” in Tool Tips or clicking on “Detail” tab.
  - Detail shows member contact information.
  - Download contains additional fields depending on dashboard.

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Members and Affiliates - Dashboard

This dashboard provides interactive views for members, society affiliates, and participants by region, geographic council, section and subsection.
- 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.
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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.

- The following options are available:
  - **Image** – downloads the image on your screen to a png file.
  - **Data** – (not recommended) downloads the data to a csv file. This option requires multiple steps for downloading to a text file and does not retain format.
  - **Crosstab** – (recommended download option) downloads the data to a csv file.
  - **PDF** – downloads the image on the screen to a PDF file.

- **Important note**, if you do not select the title of the visualization before clicking Download, the data and crosstab options will be grayed out.
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Students - Dashboard

- The Student Dashboard provides information regarding members (any grade) attending educational institutions. Information is grouped by Region, Section and School.

- There are two dashboard tabs available:
  - Dashboard – shows the predefined tables and visualizations available for a breakdown view by School, Grade, Gender and Field of Study.
  - Detail – contains the individual member information.

- Top level filtering is on Region, Grade and IEEE Status.
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Volunteer Positions - Dashboard

- The Volunteers Dashboard has two tabs and one link available.

- Volunteer Positions – lists “all” current IEEE volunteer positions. Use filter options to select a specific OU type and OU Name.
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Memberships, Subscriptions, and More... - Dashboard

- **Renewal Category Dashboard** – provides product renewal information based on filters selected. Renewal categories provided are: Renew, First Year Renewed, New, Reinstated, Not Yet Renewed and Cancelled.

- Filters provided are Product Type, Product Name, Region, Grade, and Status.
  - **Overview of Product Renewals** (bar chart) – provides a breakdown by renewal categories. Hover over to view additional statistical information.
  - **Product Summary by Region by Renewal Category** (data table) – provides a count of members by Region by Renewal Category.
  - **Recommendation:** Downloading Column and Row Totals default to “Grand Total” counts, which can be significant and provide excess data. Use Filters to refine data per OU.
IEEE OU Analytics

Questions & Assistance

- If you have any questions regarding OU Analytics or need further assistance send an email to ouanalytics@ieee.org
Other recent vTools changes (2017)

- **Events**
  - New support for custom registration questions
  - New support for student branches and IEEE-HKN
  - Registration payment data now includes price description and restriction

- **eNotice**
  - Personalization of eNotice messages
  - Customization of ‘From’ and ‘Reply To’
  - Send test eNotice
  - Link to view an event included in eNotice messages

- **Officer Reporting**
  - Updated look and feel