## **IEEE/PES SUBSTATIONS COMMITTEE**

# **Association Management System (AM System)**

-- Operating Instructions for Committee Admins--

Markus Etters (Committee Secretary) is primary System Administrator. The Committee Chair (presently John Randolph), the Committee Vice-Chair (presently Mike Dood), and Meetings Subcommittee Chair Presently Diane Watkins) are secondary System Administrators.

#### Notes:

- 1. Additional instructions can be found within the Help section of the AM System.
- 2. Our association ID is "IPSC".

## INTRODUCTION

This innovative web-based system allows our Committee, subcommittees, working groups, task forces, and liaison associations to operate and communicate more effectively. Activity Leaders (subcommittee, working group, and task force officers) can maintain membership records, print activity/meeting rosters, and send emails. Fewer bounced emails will result because individual contact information is "self-maintained" by each individual and is stored in a single relational database used by all functions of the system. The AM System also provides a more efficient and cost-effective on-line meeting registration system.

# **MAJOR FUNCTIONS**

- 1. Association Management System
  - membership directory (only accessible to Committee Members)
  - maintain activity membership lists
  - send emails to activity participants
  - print activity/meeting rosters
  - maintain historical meeting attendance records
  - determine "stale members" who have dropped out of participation (a future function)
- 2. Event Registration (upcoming function)
  - meeting pre-registration
  - meeting on-site registration
  - print name badges
  - etc.

#### SECURITY AND PRIVACY

Every effort has been made to ensure that unauthorized access to personal contact information is limited. Although some limited contact information can be accessed one record-at-a-time, contact information of system participants in long-list format cannot be viewed by individual users.

Note: All system accesses and functions are logged! Anyone performing undesired or malicious (or accidental) activities can be identified. Any use of the system for commercial purposes -- for instance, numerous repetitive access to the Membership Directory to create marketing-type lists -- may result in permanent suspension from system access.

#### **SYSTEM ACCESS**

If you are an Activity Leader (SC/WG/TF chair, vice-chair, or secretary), you are provided "limited administrative rights" by a System Administrator. If you cannot access the AM System, contact a System Administrator to be provided administrative rights.

Major functions of the AM System will be accessed in the future from the Substations Committee website (http://ewh.ieee.org/cmte/substations/). Major system functions include: Enroll, View or Modify Personal Profile, Membership Directory, and Control Center. Administrative functions are performed within Control Center.

#### **HONOR SYSTEM**

All Activity Leaders (SC/WG/TF chair, vice-chair, or secretary) have the same administrative rights. Any activity can be modified by any Activity Leader! Although there are protections to limit someone from adding or deleting an activity, anyone with administrative rights can access and modify any activity -- not just those activities you are directly responsible for. All Activity Leaders operate on the "honor system". Please be careful to only make modifications to your activity! If you are an administrator of a "child activity" (a WG or TF), be especially careful to ensure you are making modifications to your activity and not the associated parent SC.

Note: All individual system accesses and functions are logged. Those performing malicious (or accidental activities) can be identified.

## **SYSTEM NAVIGATION**

Important: When navigating through the system, **DO NOT** use the "back arrow" on your web-browser. Use the done/back/save radio buttons at the bottom of the 123SignUp screen.

## **LEVELS OF MEMBERSHIP** (Important ... Understand This!)

There are essentially three levels of membership in the system:

- -- Committee Member (a "full voting member" of the Substations Committee)
- -- Active Participant (not a Substations Committee Member, but an active contributor and meeting attendee)
- -- Interested Participant (a "remote observer" and supporter of the Committee's scope)

Anyone can enroll in the AM System -- even those who desire to only passively monitor Committee work from a distance. Initially, a person is automatically enrolled as an Interested Participant. Once Substations Committee membership or regular participation as a Working Group or Task Force member is validated by a System Administrator, enrollment is manually upgraded to Active Participant or Committee Member.

## COMMITTEES, SUBCOMMITTEES, PARENT/CHILD COMMITTEES, ETC.

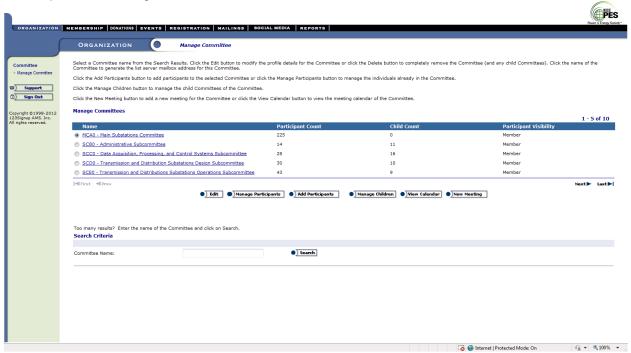
The AM System uses the term "committee" to refer to any activity. Although we are the "Substations Committee" (TC), and have various activities such as subcommittees (SCs), working groups (WGs), and task forces (TFs), the AM System refers to all activities as **committees** or **children**.

Generally, "parent committees" refer to TC subcommittees and liaison activities (NEMA, ANSI activities, etc). Child committees are working groups and tasks forces "under" parent committees. Task forces can be created that operate directly under a subcommittee (as a child) or directly under a working group (as a grandchild).

# MANAGE COMMITTEES (This is where you start!)

Most of the effort by Activity Leaders is performed from the "Manage Committee" area. After logging into the Control Center, the system should initially open into the ORGANIZATION section. If not, select the black tab "ORGANIZATION". The Manage Committee link is located towards the bottom of the left-hand side of the page.

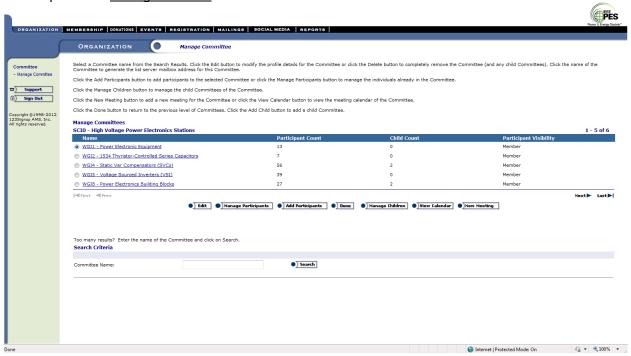
Screen print from Manage Committee selection:



The Child Count column indicates the number of WGs or TFs that are sponsored by the listed Subcommittees.

Once the Manage Committee function is open, page to the desired TC subcommittee using the left and right Next and Prev arrows. TC Subcommittee officers should manage participants and meetings from this level. Working Group officers should select a particular Subcommittee (fill-in the small circle to the left of the SC name) and select the Manage Children button. Navigate through the system to find the desired WG.

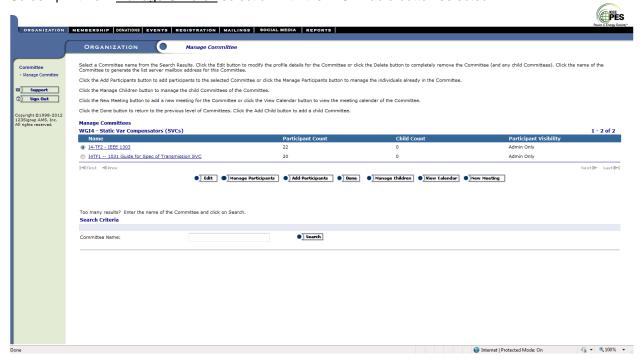
Screen print from Manage Children selection with the SCI0 radio button selected:



The above are the Working Groups under the I0 Subcommittee. The Child Count column indicates the number of TFs that are sponsored by the listed WGs.

Task Force officers should select a particular Working Group (fill-in the small circle to the left of the WG name) and select the <u>Manage Children</u> button. Navigate through the system to find the desired TF.

Screen print from Manage Children selection with the WGI4 radio button selected:

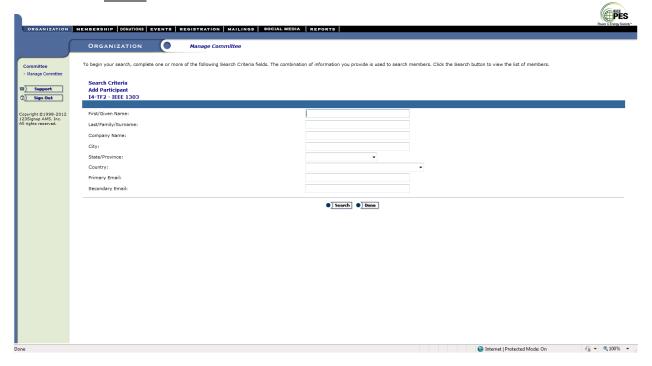


### **ADDING PARTICIPANTS**

Once the desired activity is located, select it by clicking the small circle to the left of the activity name. To add participants, select Add Participants.

Participants can be added two ways:

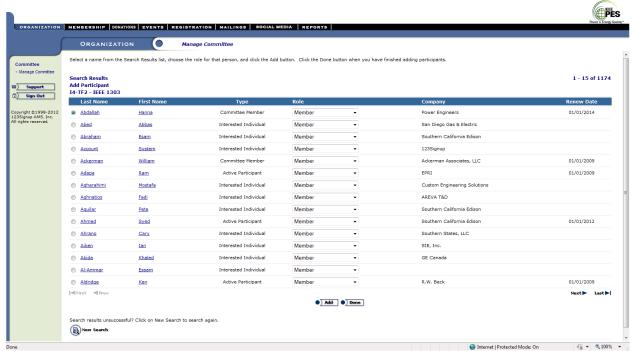
1. Search for an individual by entering their first or last name (or a part of their name) in the search boxes and then select the Search button at the bottom.



#### OR

2. Without entering anything into the search boxes, select the <u>Search</u> button at the bottom to view a list of everyone entered into the AM System who is not already a participant of the selected activity.

Screen print after selecting Search button:



Participants can only be entered one at a time. Using the Member pull-down window, indicate their status in the activity as the Chair, Vice-chair, Secretary, Member, Guest, or Corresponding Member. Once a participant is added, their name disappears from the list indicating they have been added.

If trying to add a participant, and they do not appear in the system (using method 1 or 2 above), it is because that individual has not signed-up into the AM System. Please help us to completely populate the system by contacting that individual and instructing them to sign-up to the AM System via the Substations Committee website (go the AM System page and click on "Sign-in").

Generally, most individuals who have attended a past Committee meeting and participate regularly are enrolled in the AM System and may have been upgraded to Active Participant or Committee Member membership status. If you try to enter a participant in an activity, and a warning appears that they "do not have access", it is because they have not been manually upgraded by a System Administrator to the Committee Member or Active Participant membership level (perhaps they have recently signed-up to the AM System and still need to be manually upgraded). Go ahead and bypass the warning, add them as a participant of the activity, and notify a System Administrator to investigate the situation.

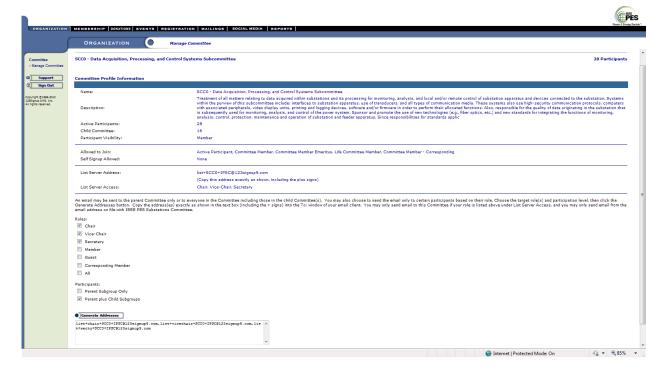
You may view or remove participants by using the <u>Manage Participants</u> button on the Manage Committees page. You may also change their activity status (Chair, Vice-chair, Secretary, Member, Guest, or Corresponding Member) using that function.

## **SENDING EMAILS**

Note: Only the chair, vice-chair, and secretary role can send emails using the system. Also, the system does not support the role of a Co-chair or a Technical Editor.

An email message may be disseminated to any activity/group (SC/WG/TF). This is done by sending an email from your regular email client (MS-Outlook, Lotus Notes, AOL, Yahoo, etc.) to the AM System. The AM System then forwards the emails to every participant added into the activity. Less "bounced emails" will happen because the individual contact information (email addresses, etc) are self-maintained by each individual.

To send an email, you must first "generate" an email address using the AM System. While in the Manage Committee section, click on the <u>underlined name</u> of the activity. This will display the associated committee profile information. <u>By default</u> the email will go to everyone within the parent committee ("All" under **Roles**). Select the people you with to send the message to by clicking on the radio button next to each desired type of member (i.e. Chair, Secretary, members, etc) under **Roles**:.



<u>Important</u>: When sending an email to a parent committee (perhaps a particular subcommittee), if you want the email to go to the Parent Subgroup and ALL WGs and TFs, then under **Participants**:, select "Parent plus Child Subgroups" box.

At the bottom of that page, click on <u>Generate Addresses</u>. A long strange-looking email address will appear. In the above print screen the string is:

list+chair+SCC0+IPSC@123signup9.com,list+vicechair+SCC0+IPSC@123signup9.com,list+secty+SCC0+IPSC@123signup9.com.

Cut-and-paste that long email address into the "TO" box of your email client and send an email as you normally would. You can include an attachment in the email as well. Attachments are currently limited to 1 MB in size.

Note: If you use an email system that uses a separator other than a comma, you may need to replace the commas in the address string with the appropriate separator symbol (i.e. for Outlook, you will need to use a semicolon instead of the comma).

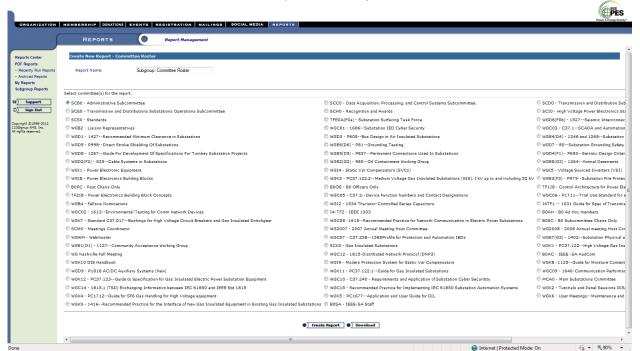
Initially, only the chair, vice-chair or secretary of the activity can send an email (we may allow manual selection of other individuals later). Also, it may take up to two hours to completely disseminate a message from the 123SignUp batch server.

Important: If you use your IEEE alias email address (<a href="joeblow@ieee.org">joeblow@ieee.org</a>) to log-in, you need to add a "secondary email" address into your profile. When you send an email to the AM System to be disseminated, the system validates the email address the message was sent from, against both the primary and second email addresses in your profile. If your work email address is entered as the secondary email address, and you wish to send an email from another email client (perhaps from your home), you will need to temporarily change the secondary email address in your profile before sending an email.

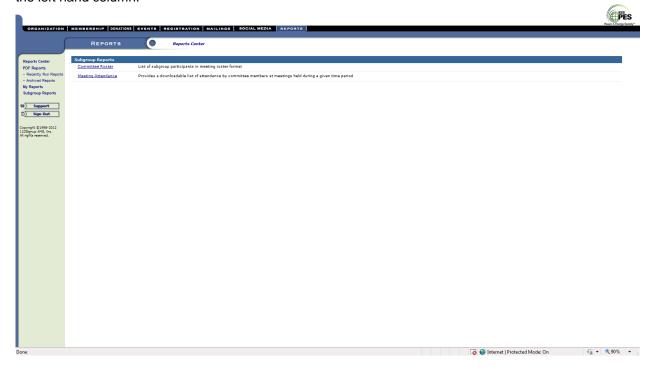
#### **PRINTING ROSTERS**

A "Committee Roster" may be printed and taken to a meeting and used to record attendance of an activity. It may also be downloaded into CSV format and pasted into a spreadsheet for further manipulation.

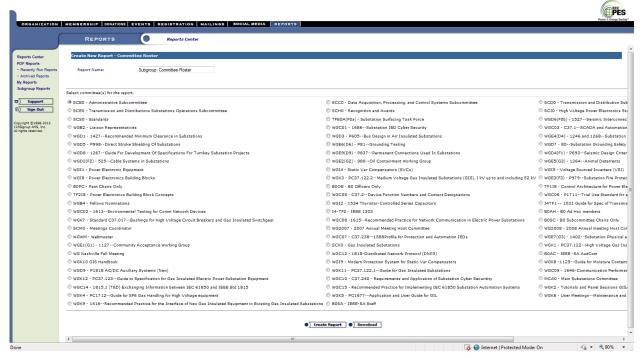
First, click on the black REPORTS tab at the top of the AM System.



The default is "Subgroup Committee Roster". If another choice is desired select the link <u>Subgroup Reports</u> in the left hand column.

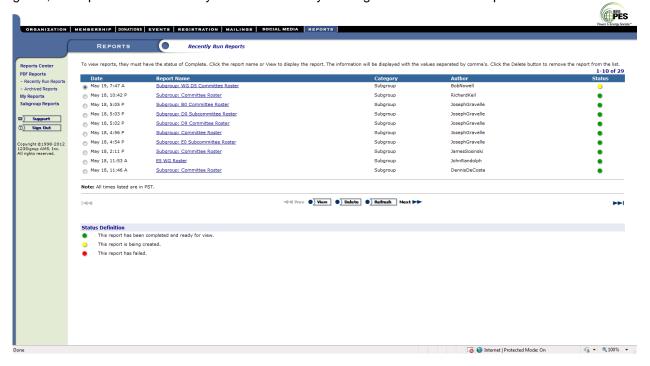


## Choose Committee Roster or Meeting Attendance

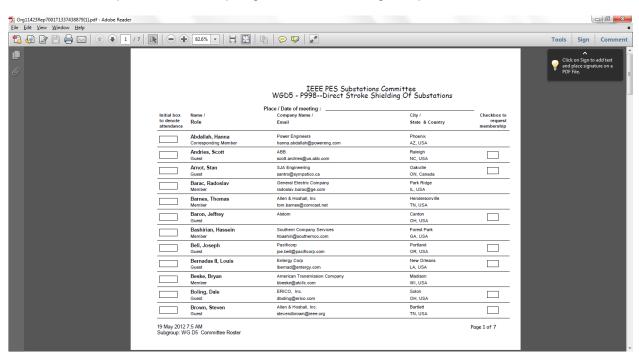


Select the desired committee (SC/WG/TF), edit the name of the report in the box at the top of the page, and choose <u>Create Report</u> (creates a PDF file on the 123SignUp site) or <u>Download</u> (creates a CSV formatted file that can be opened or saved locally). Once a report is selected, it is created by the AM System.

Select the radio button for the report you generated and click on Refresh. Once the circle to the right turns green, the report is created it may then be viewed by clicking on the underlined report name.



Below is a screen print of the PDF report generated for Working Group D5:

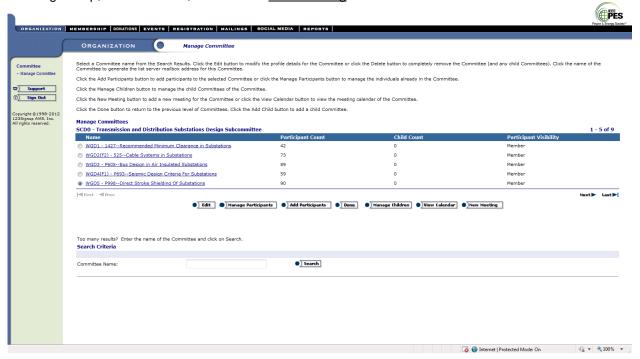


This roster does not include extensive contact information (snail-mail addresses, phone/fax numbers, etc). It is no longer necessary for individual activity chairs to maintain that information as it is now self-maintained by individual participants.

#### RECORDING MEETING ATTENDANCE

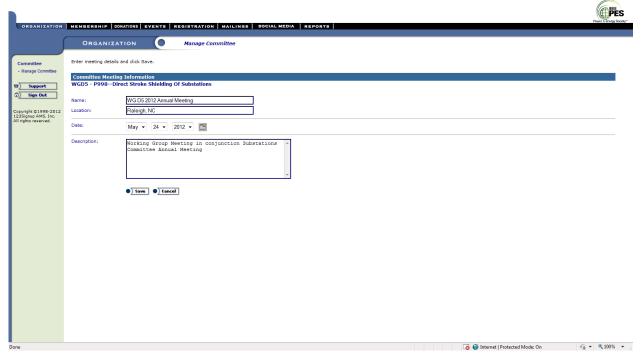
Attendance at individual activity meetings can be recorded.

To do this: While working in the Manage Committees portion of the AM System, select a particular Subcomittee, Working Group, or Task Force, and click on <u>New Meeting</u>.

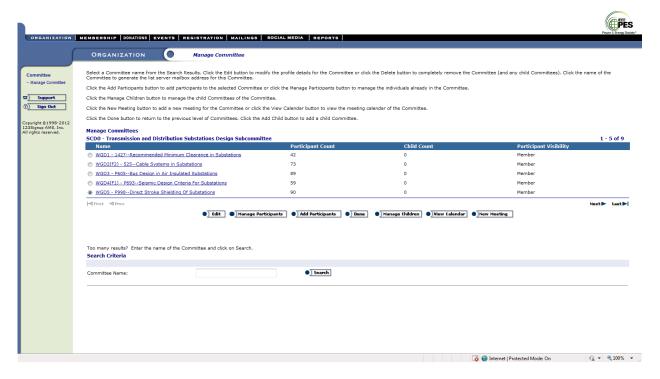


Complete the required information as follows:

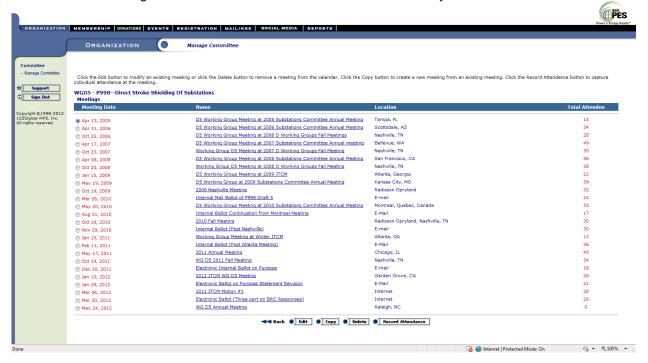
- Name: Suggest "2012 Annual Meeting" or similar
- Place: Suggest "Raleigh" or similar
- Description: Although not necessary, a description of the meeting may be added.



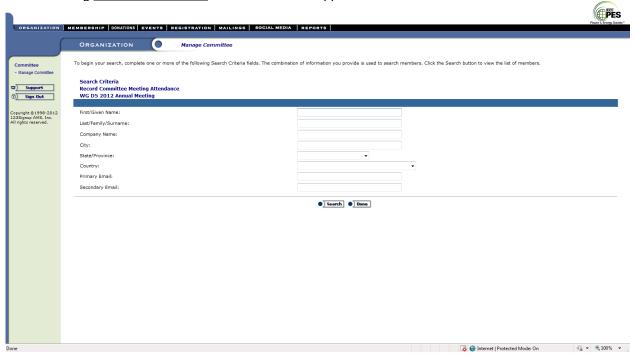
Once the information is added, click on Save.



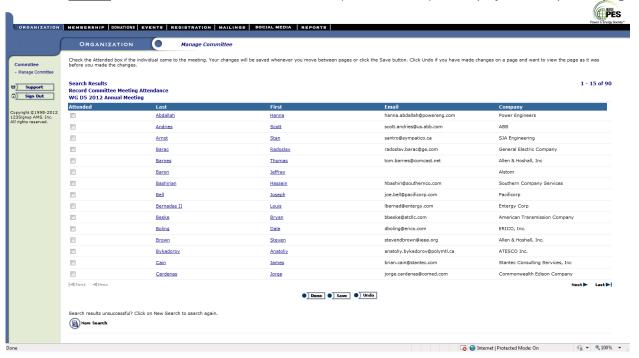
After the meeting (or when the opportunity arises), click on <u>View Calendar</u>, select the desired meeting, and select <u>Record Attendance</u>. You may also enter past meetings if desired to record historical attendance and track participation. In the screen print below the meeting Total Attendance is displayed for each meeting saved. Notice the last meeting in the list shows 0 as this has not been recorded yet.



After selecting Record Attendance the screen below appears:

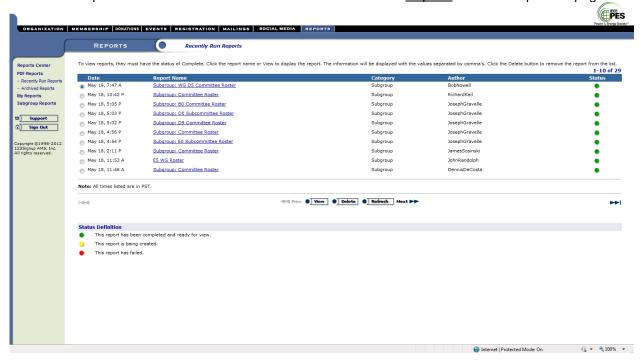


Select the <u>Search</u> button and all of the roster of this WG (in this case 90) are displayed on sequential pages:

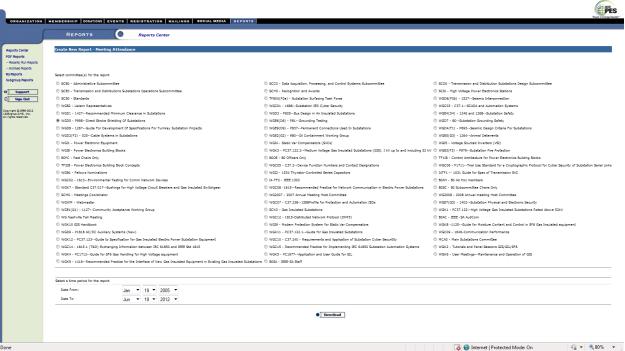


Select the checkbox next to a participant's name to record attendance.

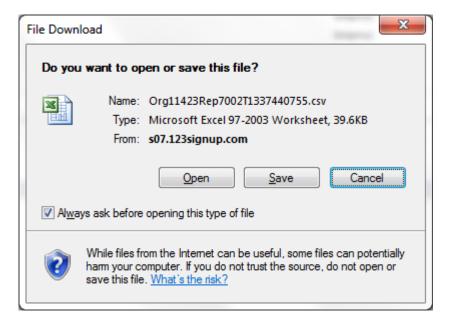
Attendance reports are available ONLY as a download. Select the Reports tab at the top of the page.



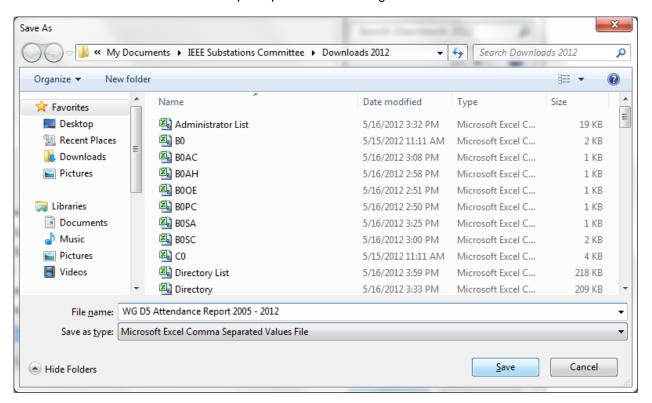
Select <u>Subgroup Reports</u> in the left hand column. The choose <u>Meeting Attendance</u>. Choose the desired SC, WG, or TF.



It is useful to regenerate this download for ALL meetings each time it is exercised but is not necessary. Notice the <u>Date From</u> date is January 1, 2005. The system was inaugurated in early 2005. Select Download (some users may have to depress the CTRL key while the download generates).



Save the file to a secure location with perhaps a more meaningful file name.



# Below is a screen print of the downloaded report:

	A	В	С	D	E	F	G	H	1	J	K	L	M	N	0	P	Q	R	S	
Su	bgroup Name	123Memb	Members	Role	Participa	Type	First Nam	Last Name	Email	Company (	City	State	Country	IEEE Mer	n 4/13/2005	4/11/2006	10/25/200	6 4/17/2007	10/23/200	7 4/
w	GD5 - P998Direct Stroke Shielding Of Substations	1003042	Active	Correspon	r Active	Committe	Hanna	Abdallah	hanna.abo	Power Engl	Phoenix	AZ	USA	Yes		X	X	X	X	X
w	GD5 - P998Direct Stroke Shielding Of Substations	1003047	Active	Guest		Active Par		Aldridge	kaldridge	R.W. Beck	Goodletts	TN	USA	Yes			X	X		х
	GD5 - P998Direct Stroke Shielding Of Substations	1003052	Active	Member	Terminat	e Intereste	John	Anderson		Power Tec S	Schenect	NY	USA							
w	GD5 - P998Direct Stroke Shielding Of Substations	1003061	Active	Member	Active	Committe	Thomas	Barnes	tom.barne	Allen & Ho	Henderso	TN	USA	Yes		X	X		X	
w	GD5 - P998Direct Stroke Shielding Of Substations	1003078	Terminat	Member	Terminat	e Intereste	Michael J	. Bogdan	bogdanme	Niagara M S	Syracuse	NY	USA							
w	GD5 - P998Direct Stroke Shielding Of Substations	1003082	Active	Guest	Active	Active Par	r Dale	Boling	dboling@	ERICO, Incs	Solon	ОН	USA	Yes					X	х
w	GD5 - P998Direct Stroke Shielding Of Substations	1003090	Terminat		Terminat	Active Par	r R. Steve	Brown	r.steve.bo	Puget Sou B	Bellevue	WA	USA			X				
w	GD5 - P998Direct Stroke Shielding Of Substations	1003091	Terminat	Member	Terminat	Active Par	r Richard	Brown		AVO Inter \	Valley Fo	PA	USA							
w	GD5 - P998Direct Stroke Shielding Of Substations	1003091	Terminat	Member	Terminat	Active Par	r Richard	Brown		AVO Inter \	valley Fo	PA	USA							
	GD5 - P998Direct Stroke Shielding Of Substations	1003092	Active	Guest	Active	Committe	Steven	Brown	stevendbr	Allen & Ho	Bartlett	TN	USA	Yes		X			X	
	GD5 - P998Direct Stroke Shielding Of Substations	1003103	Terminat	Correspon	r Terminat	Active Par	r Bill	Carman	bcarman@	Safearth E	Wallsend		Australia					X		
	GD5 - P998Direct Stroke Shielding Of Substations	1003106	Active	Guest	Terminat	Active Par	r Chris	Chadbour	chris.chad	FCI USA. Ir I	Manchest	NH	USA	Yes						х
	GD5 - P998Direct Stroke Shielding Of Substations	1003107		Member		Active Par		Chan		Bechtel I			USA	Yes				X		х
	GD5 - P998Direct Stroke Shielding Of Substations	1003115	Active	Member	Active	Committe	Randy	Clelland	randy.clel	BC Hydro	Burnaby	BC	Canada	Yes					X	х
	GD5 - P998Direct Stroke Shielding Of Substations	1003129			Active	Committe			dfdecosta			MI	USA	Yes			X	X	X	х
	GD5 - P998Direct Stroke Shielding Of Substations	1003134	Terminat	Guest	Terminat	Active Par		Dick	peter.dick	Kinectrics 1	Toronto	ON	Canada							
	GD5 - P998Direct Stroke Shielding Of Substations	1003137	Active	Guest	Terminat	e Committe	W. Bruce	Dietzman	w.b.dietzi	Oncor Elec	Ft. Worth	TX	USA	Yes				X		х
-	GD5 - P998Direct Stroke Shielding Of Substations	1003137		Member		Committe			w.b.dietzi				USA	Yes				X		х
	GD5 - P998Direct Stroke Shielding Of Substations	1003144	Active	Correspon	r Terminat	e Intereste	c Edgar	Taylor			Pittsburg	PA	USA							
	GD5 - P998Direct Stroke Shielding Of Substations	1003148		Member		Life Comn			g.engman				USA	Yes		X	x	X	X	х
	GD5 - P998Direct Stroke Shielding Of Substations	1003150		Guest	Active	Committe		Etter		ABB Inc.			USA	Yes						
	GD5 - P998Direct Stroke Shielding Of Substations	1003152				Active Par							USA							
	GD5 - P998Direct Stroke Shielding Of Substations	1003166			Active	Committe		Garrett		Southern E			USA	Yes		X	x	x	х	х
	GD5 - P998Direct Stroke Shielding Of Substations	1003172				Active Par		Gore		Tennesse (			USA	Yes						
	GD5 - P998Direct Stroke Shielding Of Substations	1003174				Active Par			kenny.gra				USA	No						
	GD5 - P998Direct Stroke Shielding Of Substations	1003177		Member	Active	Active Par			sgreenfiel				USA	Yes		X	x		х	х
	GD5 - P998Direct Stroke Shielding Of Substations	1003191		Guest		ELife Comm		Harris		SPX Trans			USA	Yes						
	GD5 - P998Direct Stroke Shielding Of Substations	1003194		Secretary		Committe		Havelka		Erico, Inc. S		ОН	USA	No			x	x	х	х
	GD5 - P998Direct Stroke Shielding Of Substations	1003219		Guest		Active Par		Jendek		Hydro On(1		ON	Canada	Yes						
	GD5 - P998Direct Stroke Shielding Of Substations	1003230		Guest		Active Par			bil.kahane				USA	Yes		x				
	GD5 - P998Direct Stroke Shielding Of Substations	1003233				Active Par		Kasper		ERICO INC	_		USA	103		^				
-	GD5 - P998Direct Stroke Shielding Of Substations	1003235		Member	Active	Committe		Keil		Commony I		ОН	USA	Yes					X	x
	GD5 - P998Direct Stroke Shielding Of Substations	1003235				Committe		Kelley		Salt River			USA	Yes				x	X	x
	GD5 - P998Direct Stroke Shielding Of Substations	1003241				Active Par		King		BC Hydro (			Canada	103				^	^	^
	GD5 - P998Direct Stroke Shielding Of Substations	1003241		Guest	Active	Committe				Siemens / E		Other	Germany	Vac						
	GD5 - P998Direct Stroke Shielding Of Substations	1003243				e Committe		Koenig		Ameren S S			USA	Yes	X					
	GD5 - P998Direct Stroke Shielding Of Substations	1003244		Guest		e Committe		Kollar		FirstEnerg A		OH	USA	Yes	^	x				
	GD5 - P998Direct Stroke Shielding Of Substations	1003243		Guest	Active	Committe			johnd.mc			GA	USA	Yes		^				
	GD5 - P998Direct Stroke Shielding Of Substations	1003281		Vice-Chai		Committe			sakis.m@			GA	USA	Yes	x	x		x		х
	WG D5 Attendance Report 2005 -	1005284	Active	vice-chai	Active	Committe	JdKIS	wenopou	sakis.iii@[		Atlanta	UA	USA	res	^	^		^		