

Central Texas Section

May 2018 – San Antonio Area Chapter Officer Training

Agenda

- ▶ Chapter Officer Responsibilities
- ▶ Vtools
- ▶ Chapter Elections
- ▶ Chapter Finances
- ▶ SAMIEEE/Vitality Dashboard Replacement – OU Analytics
- ▶ General Data Protection Regulation (GDPR)
- ▶ PACE

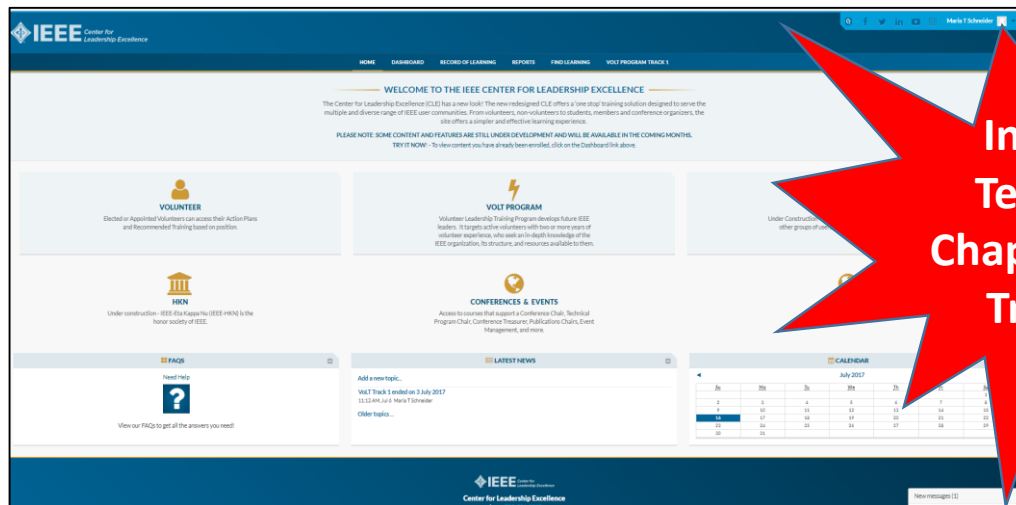
Chapter Officer Roles and Responsibilities

What you need to do.....

- ▶ Engage with CTS and your chapter members
- ▶ Provide programs and activities of interest to your members
- ▶ Develop and grow your membership
- ▶ Report chapter officers.
- ▶ Manage chapter financial matters including budgeting and expense reporting
- ▶ Announce and report meetings (file L31s)
- ▶ Hold elections
- ▶ Have fun!

IEEE Center for Leadership Excellence

ieee-elearning.org/CLE/



PLEASE NOTE: SOME CONTENT AND FEATURES ARE STILL UNDER DEVELOPMENT AND WILL BE AVAILABLE IN THE COMING MONTHS.

- ▶ Simple to use, self-paced
- ▶ Access with IEEE Account
- ▶ Offers help to Volunteers in their new role with ACTION PLANS!
- ▶ Currently 14 Volunteer roles/action plans defined
- ▶ 12 Volunteer roles/action plans in development

Vtools

How to do it.....

- ▶ Three Key Things to Do
 1. Report Chapter Officers
 2. Announce Meetings
 3. Report Meetings

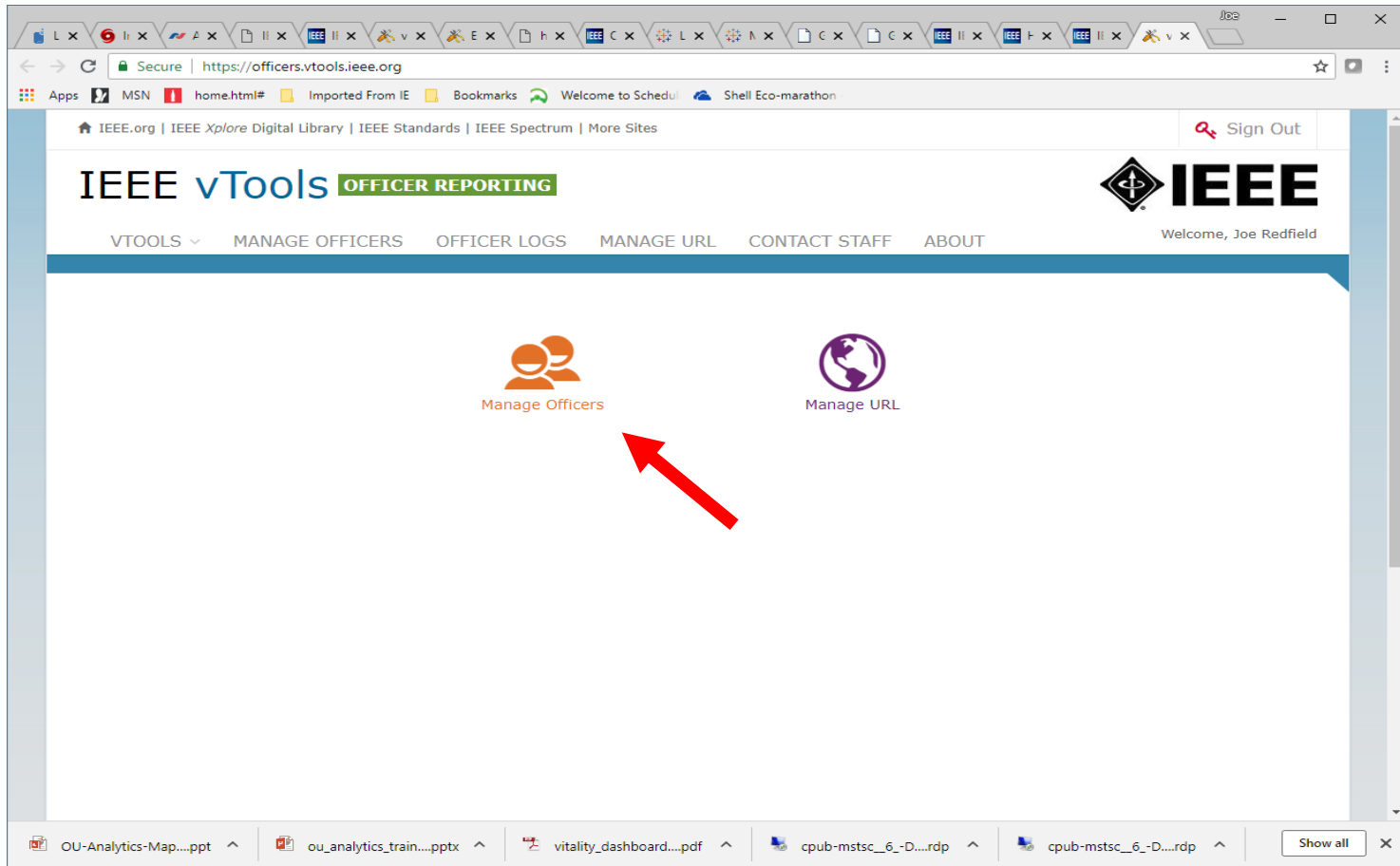
- ▶ Member Communications
 - eNotice

- ▶ Other capabilities that may be of interest
 - Name tag printing
 - Vtool voting

<http://sites.ieee.org/vtools/>

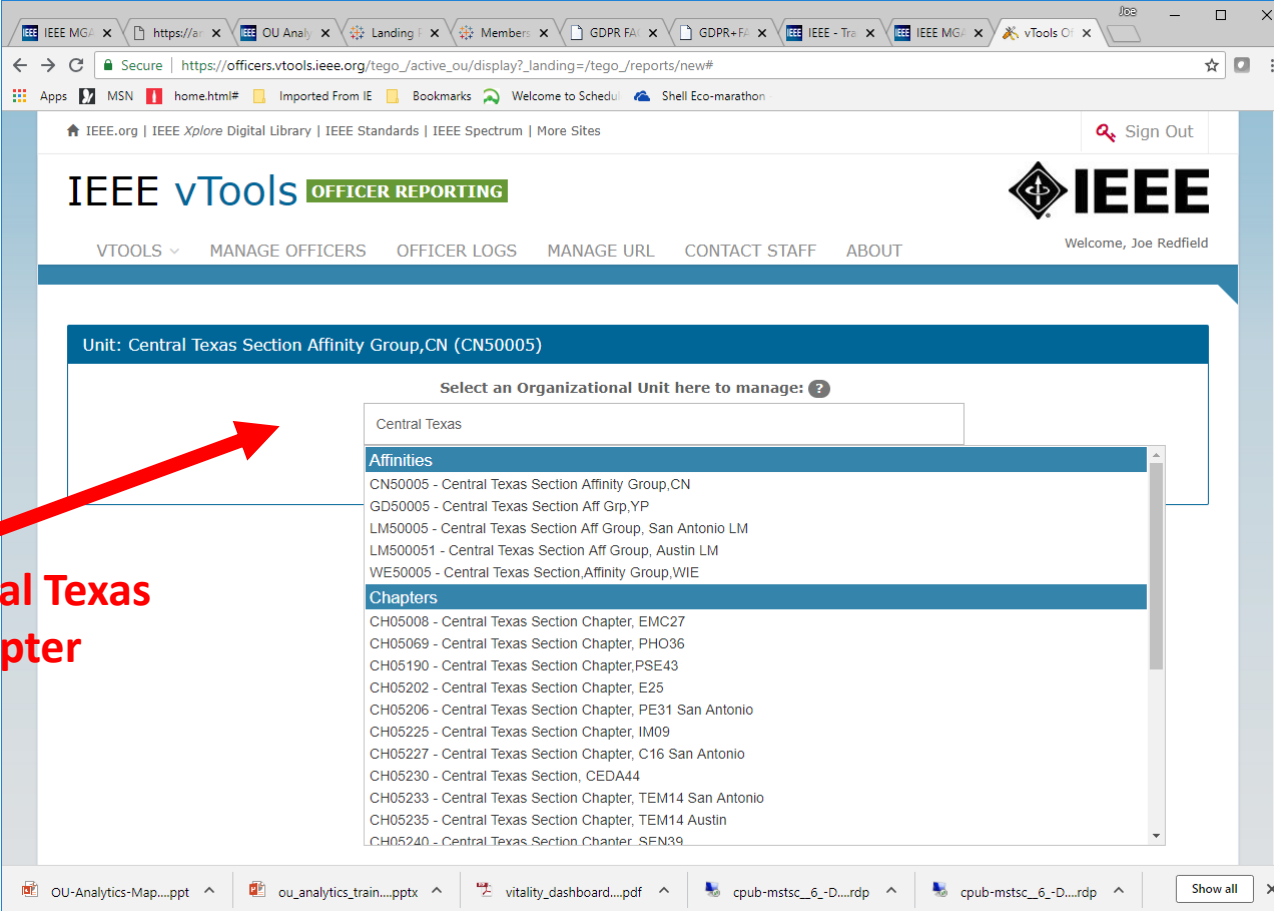
Officer Reporting

<https://officers.vtools.ieee.org/>



Officer reporting

Officer Reporting – Select Organization Unit



The screenshot shows a web browser window displaying the IEEE vTools Officer Reporting page. The page title is "IEEE vTools OFFICER REPORTING". The user is logged in as "Joe Redfield". The page shows a dropdown menu for selecting an organizational unit. The dropdown is open, showing a list of units under the heading "Select an Organizational Unit here to manage: ?". The list is divided into "Affinities" and "Chapters". A red arrow points to the "Central Texas" option in the dropdown menu.

Unit: Central Texas Section Affinity Group, CN (CN50005)

Select an Organizational Unit here to manage: ?

Central Texas

Affinities

- CN50005 - Central Texas Section Affinity Group, CN
- GD50005 - Central Texas Section Aff Grp, YP
- LM50005 - Central Texas Section Aff Group, San Antonio LM
- LM500051 - Central Texas Section Aff Group, Austin LM
- WE50005 - Central Texas Section Affinity Group, WIE

Chapters

- CH05008 - Central Texas Section Chapter, EMC27
- CH05069 - Central Texas Section Chapter, PHO36
- CH05190 - Central Texas Section Chapter, PSE43
- CH05202 - Central Texas Section Chapter, E25
- CH05206 - Central Texas Section Chapter, PE31 San Antonio
- CH05225 - Central Texas Section Chapter, IM09
- CH05227 - Central Texas Section Chapter, C16 San Antonio
- CH05230 - Central Texas Section, CEDA44
- CH05233 - Central Texas Section Chapter, TEM14 San Antonio
- CH05235 - Central Texas Section Chapter, TEM14 Austin
- CH05240 - Central Texas Section Chapter, SEN39

**Enter Central Texas
- Select chapter**

Officer Reporting

Update / Enter new officer names and IEEE info.

Be sure and enter the term ending date.

The screenshot shows a web browser window displaying the IEEE vTools Officer Reporting page. The browser's address bar shows the URL https://officers.vtools.ieee.org/tego_/reports/new. The page header includes the IEEE logo and the text "IEEE vTools OFFICER REPORTING". Below the header, there is a navigation menu with options: VTOOLS, MANAGE OFFICERS (selected), OFFICER LOGS, MANAGE URL, CONTACT STAFF, and ABOUT. A "Sign Out" button is visible in the top right corner. The main content area shows the selected unit: "Unit: Central Texas Section Affinity Group, CN (CN50005)". Below this, there is a "MANAGE OFFICERS" section with instructions: "Please make changes for the officer positions for the selected organizational unit below." There are two buttons: "Add Officer" and "End Term". A table titled "Officer Positions" lists various roles and their current holders. A link "Request a new officer position" is also present.

	Position Title	Current and Newly Elected Volunteers
<input type="radio"/>	Affinity Group Chair	Jody Everett
<input type="radio"/>	Affinity Group Secretary	William Martino
<input type="radio"/>	Affinity Group Treasurer	Jody Everett
<input type="radio"/>	Affinity Group Vice Chair	Luis Basto
<input type="radio"/>	vTools Coordinator	Lester Johnson

Announce Meetings

<https://events.vtools.ieee.org/>

The screenshot shows the IEEE vTools Events website. At the top, there is a navigation bar with the IEEE logo and the text "IEEE vTools EVENTS". Below this is a secondary navigation bar with links for "VTTOOLS", "SEARCH", "EVENT/REPORT ADMINISTRATION", "VIEW FEEDS", and "ABOUT". A user greeting "Welcome, Joe Redfield" is visible on the right.

The main content area is divided into three columns:

- About vTools Events:** Contains text explaining the purpose of the vTools Events system and a link to "Learn more about vTools Events".
- Map:** A map of the United States with pins indicating event locations. A dropdown menu for "Region" is set to "5-Southwestern USA" and "Section" is set to "CENTRAL TEXAS".
- Recent Activity:** A list of recent events with "Manage" links, including "IEEE Life Members June mtg...", "IEEE Life Members May mtg...", "PI^2 Austin Social Event at F...", "IEEE PI2 Austin, June 2018, ...", "IEEE PI2 Austin, May 2018, C...", "IEEE PI2 Austin, JUNE 2018, ...", "IEEE 1547 Workshop Sponsor", and "IEEE 1547 Workshop Sponsor".

At the bottom of the page, there are three icons: "Search Events" (magnifying glass), "Event/Report Administration" (folder icon), and "View Feeds" (RSS icon). A red arrow points from the "Search Events" icon to the "Event/Report Administration" icon.

Announce Meeting

Enter the Title,
when, where,
what time
AND for more
info contact
info



Be sure to
include your
chapter name
in the title!!

IEEE vTools **EVENTS**

VTOLS SEARCH **EVENT/REPORT ADMINISTRATION** VIEW FEEDS ABOUT

Welcome, Joe Redfield

Schedule a New Event

File a Report for a Past Event

Welcome to your event administration dashboard! Recent, upcoming, and draft events are available for management.

If you need to find a specific event to manage, visit the search page and click 'Manage' in the search results.

Events that you've worked on during this session will be listed below for convenience.

Showing top 20 recent, upcoming and draft events that you can manage below.
[Visit the search page to find a specific Event](#)

Recent Events Upcoming Events Draft Events

Title	OU	Date	Reported On	Options
Panhandle PES Technical Presentation	R50023	30 May 2018	File Report	View Manage
IEEE DALLAS YP MAY SOCIAL EVENT	GD50009	26 May 2018	File Report	View Manage
CenterPoint Energy Transmission System Protection Schemes	R50017	24 May 2018	File Report	View Manage
IEEE CTS EMC Chapter Meeting, 23 May 2018	CH05008	23 May 2018	File Report	View Manage
CTCN Monthly Meeting, Wednesday, May 23, 2018: FPGA Chips: ...	CN50005	23 May 2018	File Report	View Manage
IEEE PI2 Austin, May 2018, Tech Meeting, "Modularization of Low...	CH05009	22 May 2018	28 May 2018	View Manage
CTS Women In Engineering Monthly Book Club at CIRRUS: Crafti...	WE50005	21 May 2018	File Report	View Manage
Power and Energy Society Activities Committee	CH05001	21 May 2018	29 May 2018	View Manage
Stochastic Tools used to Improve and/or to evaluate MAC layer in...	R50019	21 May 2018	File Report	View Manage
Historic Fall River Hydro Plant tour in Estes Park	R50053	19 May 2018	19 May 2018	View Manage

OU-Analytics-Map...ppt ou_analytics_train...pptx vitality_dashboard...pdf cpub-mstsc_6-D...rdp cpub-mstsc_6-D...rdp Show all

Report Meetings

<https://events.vtools.ieee.org/>

The screenshot displays the IEEE vTools Events website. The browser address bar shows the URL <https://events.vtools.ieee.org/>. The page header includes the IEEE logo and the text "IEEE vTools EVENTS". Below the header is a navigation menu with options: VTTOOLS, SEARCH, EVENT/REPORT ADMINISTRATION, VIEW FEEDS, and ABOUT. A "Sign Out" link is visible in the top right corner. The main content area is divided into three sections: "About vTools Events", a map of the United States, and "Recent Activity". The "About vTools Events" section explains that the system is used for managing IEEE meetings and events. The map shows the United States with several event locations marked, including Dallas, Houston, Philadelphia, and Chicago. The "Recent Activity" section lists several events, each with a "Manage" link. At the bottom of the page, there are three buttons: "Search Events" (with a magnifying glass icon), "Event/Report Administration" (with a folder icon), and "View Feeds" (with a RSS icon). A red arrow points from the "Search Events" button to the "Event/Report Administration" button. The browser's taskbar at the bottom shows several open files, including "OU-Analytics-Map...ppt", "ou_analytics_train...ppt", "vitality_dashboard...pdf", and "cpub-mstsc_6-D...rdp".

Report Meeting

Report AFTER meeting is held

**Enter the Title,
when, where,
what time
AND for more
info contact
info**



**Be sure to
include your
Chapter name
in the title!!**

IEEE vTools EVENTS

VTOLS SEARCH EVENT/REPORT ADMINISTRATION VIEW FEEDS ABOUT

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Recent Events Upcoming Events Draft Events

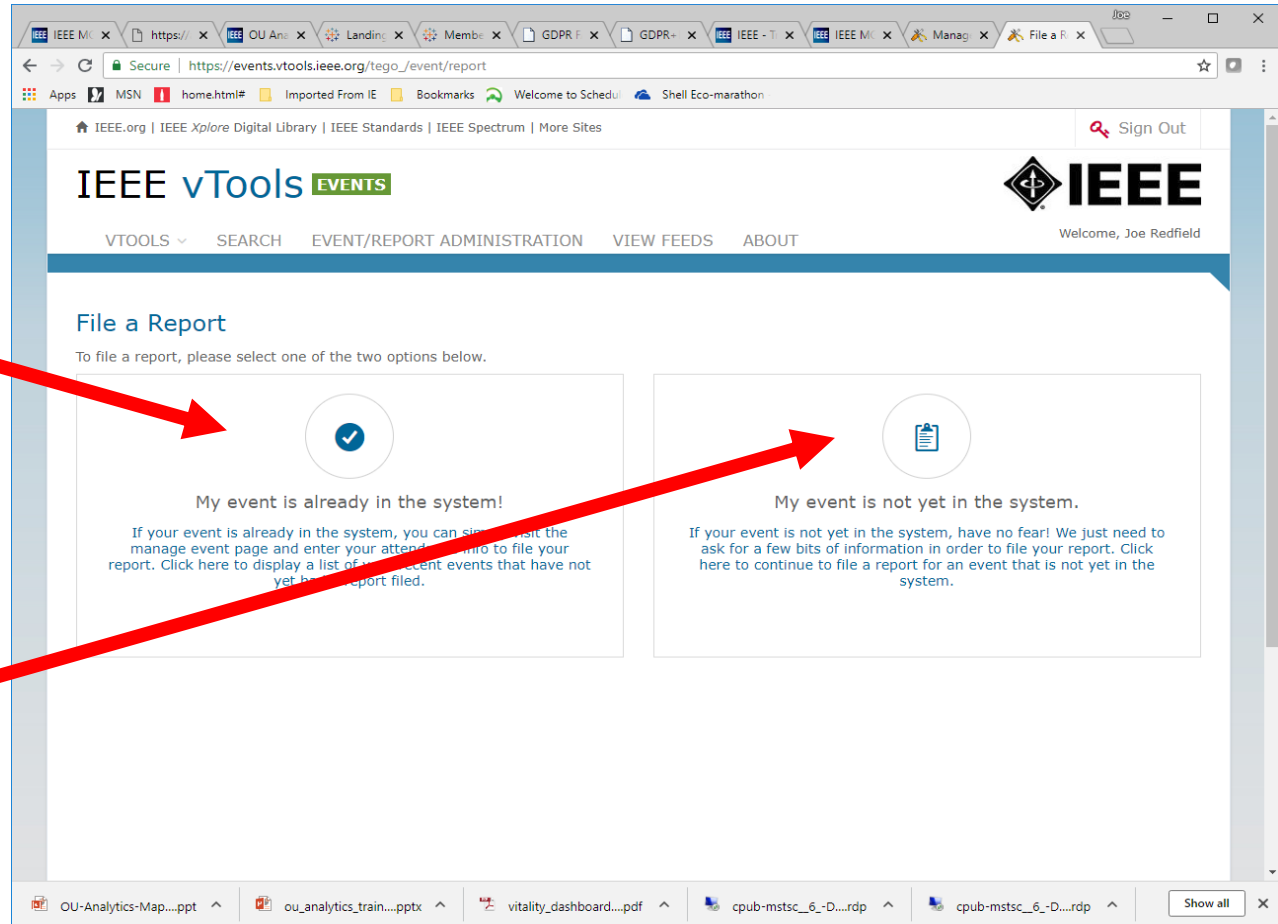
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Historic Fall River Hydro Plant tour in Estes Park	R50053	19 May 2018	19 May 2018	View Manage

Report Meeting

Report whether or not announced or in the system

**If announced,
meeting is already
in system**

**You can report a
meeting that HAS
NOT been entered.
Such as chapter
officer planning
mtg.**



Report Meetings

Already in system

Select meeting and then select manage

OR

Select manage associated with your meeting

The screenshot displays the IEEE vTools EVENTS website. The header includes the IEEE logo and the text 'Welcome, Joe Redfield'. The main content area is divided into three sections: 'About vTools Events', a map of the United States, and 'Recent Activity'. The 'About vTools Events' section contains text about the system and a 'Learn more about vTools Events' link. The map shows event locations across the United States, with a red arrow pointing from the 'Manage' link in the 'Recent Activity' list to the 'Manage' link in the 'About vTools Events' section. The 'Recent Activity' list includes items like 'IEEE Life Members May mtg:...', 'PI^2 Austin Social Event at F...', 'IEEE P12 Austin, June 2018, ...', 'IEEE P12 Austin, May 2018, C...', 'IEEE P12 Austin, JUNE 2018, ...', 'IEEE 1547 Workshop Sponsor', and 'IEEE 1547 Workshop Sponsor'. The bottom navigation bar features icons for 'Search Events', 'Event/Report Administration', and 'View Feeds'.

Report Meeting

Already in system

After meeting, reporting button will be active.

Enter attendance numbers and file the report (You've now filed the meeting L31!)

The screenshot shows the IEEE vTools EVENTS interface. The browser address bar displays the URL: https://events.vtools.ieee.org/tego_event/manage/173551. The page title is "IEEE Life Members June mtg: CPS Energy talk: Energy Industry Past, Present and Future". The event status is "Published".

Host: LMS0005 - Central Texas Section Aff Group, San Antonio LM

Category: Professional > Professional (Other)

Date and Time: 21 June 2018, 11:30 AM to 01:00 PM. All times are US/Central. Includes a link to "Add to Google Calendar".

Location: 8633 Crownhill Blvd., San Antonio, Texas, United States 78216. Building: La Fonda behind Magic Time Machine. Includes a map showing the location.

Contact: Email event contact

Registration & Pricing: No Admission Charge. Starts 30 May 2018 02:27 PM. Ends 21 June 2018 09:00 AM. All times are US/Central. Includes a "Register Now" button.

Reporting: A button labeled "Reporting" with a pie chart icon. Text below it says: "After this event, you can quickly and easily enter attendance numbers and file a report here!". A red arrow points from this button to the "Registration & Pricing" section.

The left sidebar contains navigation options: Administration Home, Manage, View, Edit, Attendance, Create from Existing, Create a Notice from Event, Session Activity, IEEE Life Members..., and Panhandle PES Tec... The top navigation includes VTOOLS, SEARCH, EVENT/REPORT ADMINISTRATION, VIEW FEEDS, and ABOUT. The user is logged in as "Welcome, Joe Redfield".

Report Meeting

NOT already in the system

Enter the title, when, where, what day/time as you would with an meeting announcement.

At the end of the form, enter the attendance and file the report.
(You've created an L31!)

The screenshot shows a web browser window displaying the IEEE vTools 'CREATE AN EVENT' form. The browser address bar shows the URL: https://events.vtools.ieee.org/tego/_event/create.... The page header includes the IEEE logo and navigation links. The main content area is titled 'CREATE AN EVENT' and contains a 'PLEASE NOTE' box and a 'DETAILS' section with various input fields. At the bottom, there are sections for 'HOST', 'LOCATION', 'REGISTRATION & PAYMENT', 'SPEAKERS', and 'REPORT AND ATTENDANCE'. A red arrow points to the 'REPORT AND ATTENDANCE' section.

PLEASE NOTE, when creating an event/report for an event that has already taken place, you must enter attendance information at the bottom of this form in order to successfully file the report!

DETAILS * Denotes a required field

Title * Category * Sub-category *

Start time * End time * Time Zone *

Description *

Header *

Footer *

Agenda *

Keywords * Event Picture * No file chosen

Invite Students? Remotely Accessible?

HOST +

LOCATION +

REGISTRATION & PAYMENT +

SPEAKERS +

REPORT AND ATTENDANCE +

Reach Your Members – Vtools eNotice

<https://enotice.vtools.ieee.org/>

To setup
select
“Manage
eNotices”

If you don't
have access,
select
“Contact” to
send request

Home Manage eNotices Contact About Help

Welcome to the IEEE vTools eNotice System

Express eNotice

- Self Service
- Available for standard geo unit eNotices
- Exceptions will be processed by staff
 - Special requests
 - Automatic reminders
 - Included attachments*

Volunteers with automatic access to eNotice include:

- Region Directors
- Section Executive Committee Members, Newsletter Editors, Webmasters
- Chapter Chairs and eNotice Coordinators

Staff processed eNotices may take up to 5 business days due to the volume of requests received daily.

For **critical eNotice requests** (e.g., cancellations), that do not qualify for eNotice Express, please set the Priority to "Critical". Every attempt will be made to accommodate critical requests during normal business hours.

IEEE organizational units using this service are strongly encouraged to limit emailings to **one per week**.

Is this eNotice for an IEEE sponsored conference?
Please use the [IEEE conference eNotice form](#).

If you need help, please [click here](#) to view a tutorial.

*Attachments can be posted on a web page and the URL included in the eNotice text.

IEEE vTools

IEEE
Advancing Technology
for Humanity

eNotice tutorial
VERY GOOD

eNotice – Creation

Select “Create eNotice”

There are two types of eNotice. They are eNotice Express and regular eNotice. eNotice Express is automatic, has no delay, and does not require IEEE staff time. Regular eNotice has a 2 to 5 day delay and requires staff time to send out.

The screenshot shows a web browser window with the URL <https://enotice.vtools.ieee.org/mailings>. The page title is "eNotice". There are navigation tabs for Home, Manage eNotices, Contact, About, and Help. A "Create eNotice" button is visible. A filter dropdown shows "Draft, Submitted and Pending" with buttons for "Show All", "Draft", "Submitted", "Sent", "Pending", and "Canceled". The main content is a table of eNotice entries.

Subject	Section	Target OUs	Status	Last Status Update	Owner	Send By	Reminder By	Priority	Type	Action
136	R50005	CH011430	Draft	10/14/2016 09:32AM	Vera Sharoff	10/17/2016	11/14/2016	Normal		
2018 IEEE PES Houston	R50017	CH05048	Draft	05/23/2018 09:52AM	Guanqun Wang	05/23/2018	05/29/2018	High		
3D Integration in Adv	R50005	CH05240	Draft	09/08/2017 03:54PM	Brent Lunceford	09/12/2017		Normal		
5	R50015	R50015	Draft	01/17/2017 04:28PM	Diane Bowen Collier	01/18/2017		Normal		
A SPECIAL INVITATION	R50011	LM50011	Draft	03/29/2018 11:09AM	James Sipes	04/02/2018		Normal		
arka	R50047	None	Draft	04/05/2016 04:58PM	Edward Greco	04/06/2016	04/14/2016	High		
Baton Rouge April Mee	R50049	R50049	Draft	03/31/2018 08:58PM	Don Couvillion	04/04/2018		Normal		
Communicati Societ	R50043	CH05085, R50043	Draft	09/28/2015 04:19PM	David Cotton	09/29/2015		Normal		
Consultants	R40037	CN40037	Draft	05/19/2018 11:48AM	Michael Fallenstein	05/23/2018		Normal		
Copy of Calling for v	R50017	None	Draft	03/07/2018 11:41AM	Mona Li	03/09/2018	03/19/2018	Normal		

Showing 1 to 10 of 163 entries

eNotice - Creation

You will have visibility at your IEEE access level.

Enter any special search requests – regular eNotice

The screenshot shows a web browser window with the URL <https://enotice.vtools.ieee.org/mailings>. The page title is "Add eNotice". The form includes the following fields and options:

- *Subject:** eNotice id 34131 (Character count: 16/100)
- *To:** R50005 - Central Texas Section, R5 - Southwestern USA - Region 5, and a "Search OUs:" search box.
- *Membership Grades:** All IEEE Members
- *Membership Status:** Active
- Schedule Reminder:** mm/dd/yyyy
- Privacy:** Private Mailing (checked)
- Special Requests:** Comments/Special Requests for eNotice admins.
- Attachments:** Choose Files (No file chosen)
- *Send By:** 06/01/2018
- From (ieee.org email):** enotice@ieee.org (with a link to "Sign up for an ieee.org email account")
- From (name):** IEEE eNotice
- Reply to (email):** j.redfield@ieee.org
- Reply to (name):** Joe Redfield
- Priority:** Normal

At the bottom, there is a rich text editor with a menu (File, Edit, Insert, View, Format, Table, Tools) and a toolbar (Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Video, Table, Undo, Redo). The text area contains the placeholder "Please insert your eNotice content here." and a red asterisk indicates that the body is a required field.

Buttons at the bottom include "Cancel", "Send Express", "Submit", and "Save".

You can save a draft OR send directly

eNotice Features

Advanced User Functions

- ▶ Automatically populate “to” list from IEEE Membership Database
 - Manages member contact flags
- ▶ Allow for reminder Emails to be automatically sent out
- ▶ Can have your email as “from”
- ▶ Can have your email address as “reply to”
- ▶ Can include send date
- ▶ Can include attachments
- ▶ Can request special actions by IEEE staff
 - Special searches

Chapter Elections

- ❑ Chapter officers: Chair, Vice Chair, Secretary, Treasurer
- ❑ Chapter officers must be Graduate Student, Member, Senior Member, or Fellow
- ❑ Chapter officers serve on Calendar year basis
- ❑ Chapter officer terms are one year for 2018 per Section Committee. Section Executive Committee will decide on later years.
- ❑ Chapter officers are limited to four consecutive years and six years total

Chapter Elections Timetable

Function	Due Date	Responsible
Appoint Nominating Committee		Chapter Chair
Call for Nominations	April 1	Section Chair/ Chapter Chair/Nom Comm Chair
Accept Nominations	Month of April	Nominating Committee Chair
Nominating Committee report to Chapter Excom	August 15	Chapter Chair/Nom Comm Chair
Publish Nominations	August 25 to September <i>Analog</i>	Chapter Chair

Election Timetable, Continued

Function	Due Date	Responsible
Accept Petition Candidates	October 15	Chapter Chair/Nom Comm Chair
Publish Modified Slate in Mid Month Reminder	October 15	Chapter Chair/Nom Comm Chair
Conduct Election via vTools or at November Chapter Meeting	Month of November	Chapter Chair
Report New Officers to Section Secretary and vTools Officer Reporting	By End of December	Chapter Chair

Chapter Finances

OU Analytics Overview

ieee.org/SAMIEEE OR

https://mga.ieee.org/resources-operations/volunteer-tools/samiee

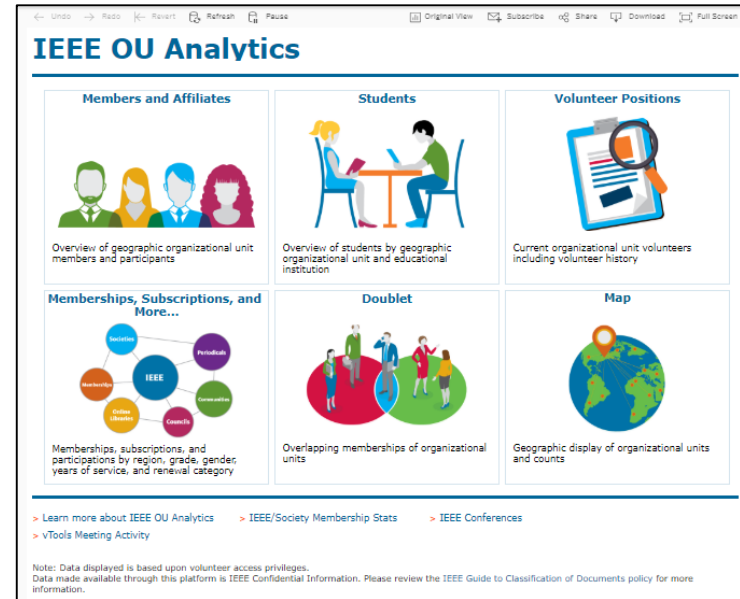
▶ SAMIEEE and the Section Vitality Dashboard have been replaced as of 30 May 2018. THEY ARE NO LONGER OPERATIONAL!

▶ **OU Analytics**

- Based in a business information tool called Tableau
- 6 Individual Dashboards with various information
- Most of the Section Vitality Dashboard has been migrated

▶ Additional training is available

▶ For questions: samiee@ieee.org



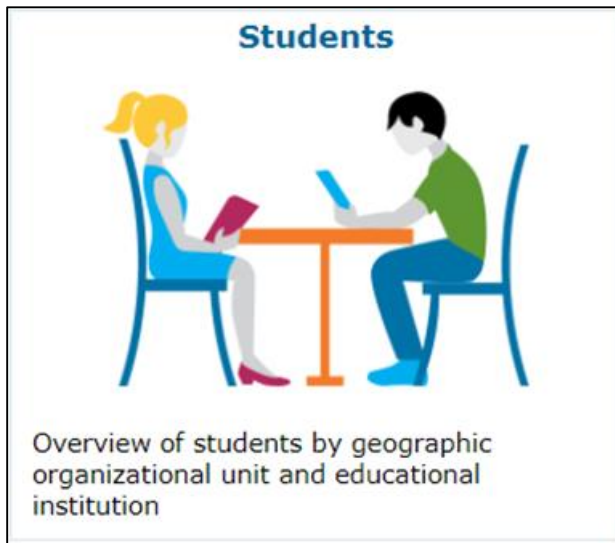
Dashboard 1: Members and Affiliates Dashboard

Main dashboard for chapter officers to get stats

- ▶ This Dashboard provides:
 - An overview of IEEE members, society affiliates, and SA members by their geographic organizational units.
 - Count of members by Region, Council, Section and Subsection is
- ▶ There are two tabs along the top:
 - Tab 1 contains the actual Dashboard
 - Tab 2 contains the member data
- ▶ There are multiple visualizations:
 - Table of Count by Grade
 - Pie chart of Count by Gender
 - Bar graph for Count by Technology Focus Area
 - Bar graph for Count by Grade and Gender



Dashboard 2: Members and Affiliates Dashboard



- ▶ This Dashboard provides:
 - Information regarding members (any grade) attending educational institutions. Information is grouped by Region, Section and School.
 - Top level filtering on Region, Grade and IEEE Status.
- ▶ There are two dashboard tabs available:
 - Tab 1 contains the actual Dashboard
 - Tab 2 contains the individual member data
- ▶ Available Data:
 - Student Counts by Section/School, Member Grade, Gender, Field of Study
 - “Student” view – students attending school outside your Section, but reside there

Dashboard 3: Volunteer Positions

- ▶ There are two tabs and 1 link:
 - Tab 1 lists “all” current IEEE volunteer positions.
 - Tab 2 contains views by OU Type and Name for all related volunteer positions
 - The link lists all “past” volunteer positions recorded in the IEEE database.
- ▶ Available Data:
 - Volunteer Count by Gender
 - Positions Vacant or Filled



Dashboard 4: Memberships, Subscriptions, and More

Main dashboard for chapter officers to member contact data

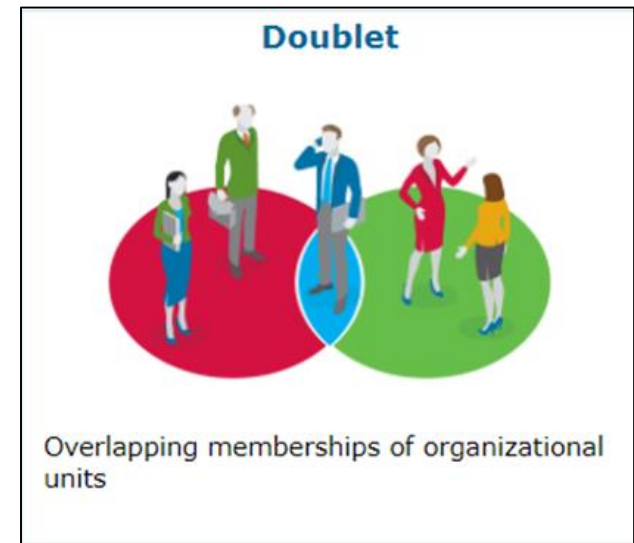


- ▶ This Dashboard provides information for:
 - Other IEEE memberships
 - IEEE Subscriptions and participations
 - By region, grade, gender, years of service, and renewal category.
- ▶ Society, Council, Community, Chapter and Affinity Group users access information for their specific group using filter
- ▶ There are five (5) tab options available:
 - Product Dashboard
 - Product Summary by Region by Grade
 - Renewal Category Dashboard
 - Renewal Summary by Region by Grade
 - Detail

Dashboard 5: Doublet

For advanced users

- ▶ This dashboard only contains one view.
- ▶ Provides counts of overlapping memberships between:
 - IEEE memberships
 - Society memberships
 - IEEE Affinity Groups
 - Standards Association membership
- ▶ The table uses two filters:
 - Primary Membership(s)
 - Secondary Membership(s)



Dashboard 6: Map

Map



Geographic display of organizational units and counts

- ▶ This Dashboard provides a geographic display of organizational units and counts.
- ▶ There are 6 Tabs:
 - Region Summary
 - IEEE/Society Member Summary
 - Chapter Summary
 - Member Count by Chapter
 - Potential Chapters
 - Affinity Group Summary
 - Student Branch Summary

OU Analytics – Getting Member Data

How to get member lists, phone numbers, email addresses

Check the Society of interest

You most likely will ONLY see the society you are a chapter of.

The screenshot shows the IEEE OU Analytics dashboard. At the top, there are browser tabs for 'OU Analytics/SAMIEEE', 'Landing Page: Landing Page', and 'Memberships, Subscriptions, and More'. The address bar shows the URL: <https://tblanalytics.ieee.org/#/site/IEEE/views/MembershipsSubscriptionsandMore/ProductDashboard?iid=2>. The dashboard header includes the IEEE logo and a search bar. Below the header, there are navigation tabs: 'Product Dashboard', 'Product Summary by Region b...', 'Renewal Category Dashboard', 'Renewal Summary by Region b...', and 'Detail'. The main content area is titled 'IEEE OU Analytics' and 'Memberships, Subscriptions, and More - Product Dashboard'. It includes a summary of the dashboard's purpose and a list of filters: Product Type (Memberships), Product Name (All), Region (All), Grade (All), and Status (Active). A 'Summary by Product' table is visible, listing various IEEE societies and their membership counts. To the right, there are two charts: 'Count by Gender' (a pie chart showing 81.81% Male and 9.71% Unknown) and 'Count by Grade and Years of Service' (a stacked bar chart). A red arrow points from the 'Product Name' filter dropdown to the 'Summary by Product' table.

OU Analytics – Getting Member Data

The screenshot shows the IEEE OU Analytics interface. At the top, there are browser tabs for 'IEEE OU Analytics/SAMIEEE', 'Landing Page: Landing Pa', and 'Memberships, Subscriptio'. The address bar shows a secure connection to 'https://tblanalytics.ieee.org/#/site/IEEE/views/MembershipsSubscriptionsandMore/P...'. The navigation bar includes the IEEE logo, a search bar, and the user name 'Joe Redfield'. Below the navigation bar, there are tabs for 'Product Dashboard', 'Product Summary by Region b...', 'Renewal Category Dashboard', and 'Renewal Summary by Region b...'. A red arrow points to the 'Detail' tab. The main content area is titled 'IEEE OU Analytics' and 'Memberships, Subscriptions, and More - Product Dashboard'. It includes a description of the dashboard and a list of filters: Product Type (Memberships), Product Name (IEEE Aerospace and Elect...), Region (R5), Grade (All), and Status (Active). There are three main data visualizations: 1. 'Summary by Product by Region' table:

Product Name	Region	Total
IEEE Aerospace and Electronic Systems	R5	349
	Total	349
Grand Total		349

 2. 'Count by Grade' pie chart showing the distribution of member grades. 3. 'Count by Gender' pie chart showing 88.83% Male, 5.16% Female, and 6.02% Unknown. At the bottom, there is a 'Count by Grade and Years of Service' stacked bar chart. A note at the bottom states: '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.'

Select Data

OU Analytics – Getting Member Data

First you must select “click” on the first column, the column will be highlighted

The screenshot shows the IEEE OU Analytics interface. The browser address bar displays the URL: <https://tblanalytics.ieee.org/#/site/IEEE/views/MembershipsSubscriptionsandMore/...>. The page title is "IEEE OU Analytics". Below the title, there is a navigation bar with options like "Product Dashboard", "Product Summary by Region", "Renewal Category Dashboard", and "Renewal Summary by Region". The main content area is titled "Memberships, Subscriptions, and More - Detail". It includes a list of filters for Product Type, Product Name, Region, Grade, Status, Gender, Years of Service, and Renewal Category. Below the filters is a table with columns: Product Name, Region, Section, Member/Customer Number, Last Name, First Name, Middle Name, Email Address, Grade, Gender, Company/Attention, City, State/Province, Country, Work Number, and Renewal Category. The table contains 18 rows of member data. A red arrow points to the "Download, Crosstab" button in the top right corner of the application. Another red arrow points to the first column of the table, which is highlighted.

Product Name	Region	Section	Member/Customer Number	Last Name	First Name	Middle Name	Email Address	Grade	Gender	Company/Attention	City	State/Province	Country	Work Number	Renewal Category
IEEE Aerospace and Electronic Systems Society Membership	RS	Arkansas Section	01259134	Rogers	Cleon	L	rogers@swbell.net	Member	Male		Little Rock	AR	USA	+1 800 245 4098	Renew
			40091956	Gentry	Brad	N	brgentry@odysseyc...	Member	Male		Maumelle	AR	USA	+1-800-257-23..	Renew
Baton Rouge Section			93692994	Chandler	Seth	E.	sethchandler@gmail...	Member	Male		Slaughter	LA	USA	+12256549340	First Year Renewed
Beaumont Section			41546166	Wang	Ruhai		rwang@lamar.edu	Senior Member	Male	Lamar Univ Elec Eng Dept	Beaumont	TX	USA		Renew
Central Texas Section			00408336	Camargo	Chris	E	chris_camargo@sbc...	Member	Male		San Antonio	TX	USA	+1 210 522 2095	Renew
			00956557	MOODIE	MYRON	L	mmoodie@ieee.org	Senior Member	Male	Southwest Res. Inst	San Antonio	TX	USA	+1 210 522 5557	Renew
			01215532	Fielding	John	E	jfielding@caci.com	Life Senior	Male		Round Rock	TX	USA	+1 512 406 3609	Renew
			01490283	Johnson	Richard	L	rjohnson042@sabx.r...	Life Fellow	Male		San Antonio	TX	USA	+210-828-3428	Renew
			02168391	Jacobsen	Debra	M	debra_jacobsen@ke...	Member	Female	Keysight Technologies	Austin	TX	USA		Renew
			02641496	Durusau	Joseph	A	durusau@att.net	Life Member	Male		San Antonio	TX	USA		Renew
			04067914	Downing	Walter	D	w.downing@ieee.org	Life Senior	Male		San Antonio	TX	USA	+1 210 522 3186	Renew
			04748331	Smith	Charles	Nils	nils.smith@ieee.org	Senior Member	Male	Southwest Research Institute	San Antonio	TX	USA	+1 210 522 3685	Renew
			04971016	Hestlow	Travis	J	hestlow@srcinc.com	Member	Male		San Antonio	TX	USA	+1 210 582 2947	Renew
			05530969	Henderson	Terry	L	henderson@arlut.ut...	Life Member	Male		Austin	TX	USA	+1 512 835 3363	Renew
			06036867	Hegedus	Daryl	J	lonestar.hegedus@s...	Life Member	Male		San Antonio	TX	USA		Renew
			07317019	Viviani	Gary	L	glv@tiac.net	Senior Member	Male		Bastrop	TX	USA	+1 512-492-2709	Renew
			07667965	Grinnan	Clara	H	grinnan@ethelohel	Life	Male		Austin	TX	USA	+1 512 329 5082	Renew

Then select “Download, Crosstab”

The file will download as a CVS.

What is the GDPR?

- ▶ **The General Data Protection Regulation (GDPR)**
 - Intended to strengthen and unify data protection for all European Union (EU) citizens and individuals within the EU
 - Instituted by the European Parliament, the Council of the European Union, and the European Commission
- ▶ The GDPR's primary aim is to give control back to citizens and residents over their personal data.
- ▶ Because of its extraterritorial aspects, international businesses will be impacted by the regulation

GDPR Went into effect 25 May 2018

Who Does the GDPR Apply To?

- ▶ GDPR applies to organizations:
 - Established in the EU or
 - Process the personal data of EU individuals, whether or not the organization was established in the EU
 - IEEE meets these qualifications and is subject to GDPR
- ▶ GDPR protects the personal data of individuals. Examples include:
 - Name
 - Photo
 - Email address
 - IP address

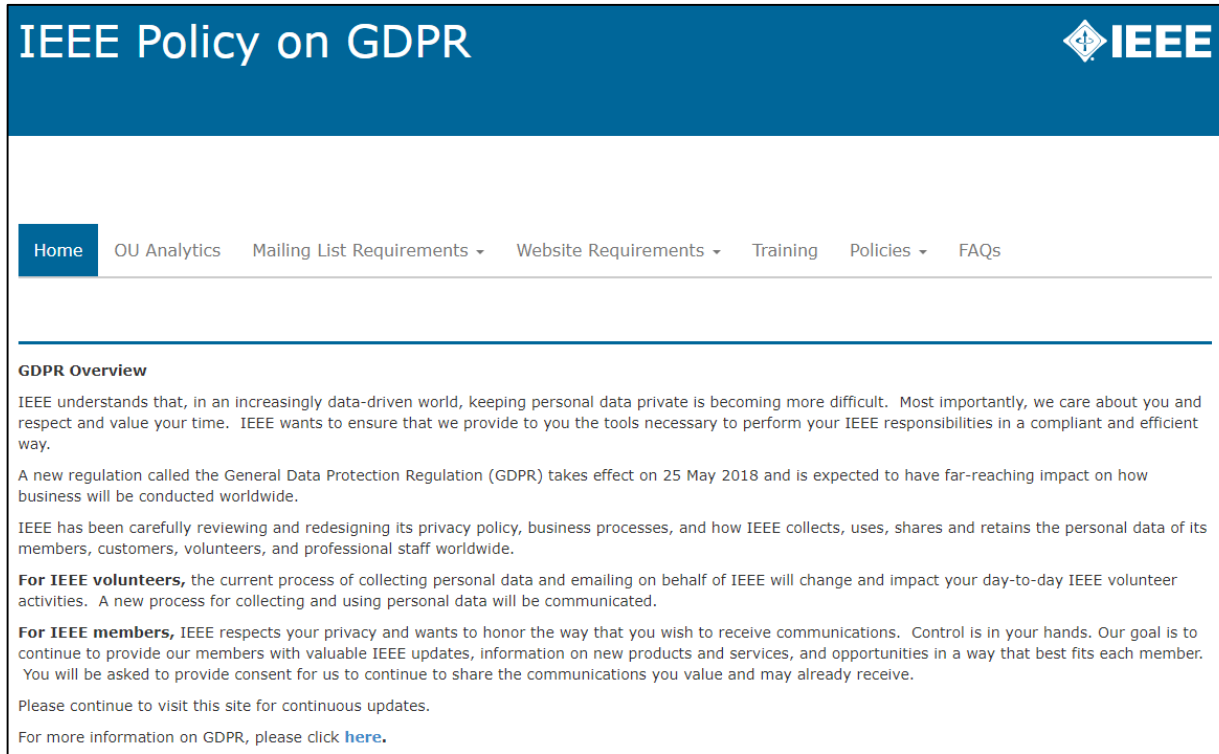
Why is Compliance Important?

- ▶ Organizations can be fined up to 4% of annual global turnover* for breaching the GDPR or €20 Million, whichever is higher.
 - This is the maximum fine that can be imposed for the most serious infringements
 - e.g., deliberate violations, not having sufficient customer consent to process data, or violating the core of Privacy by Design concepts.
- ▶ Regulatory agencies may also be permitted to enforce other penalties such as deletion of personal data and placing limitations on interactions with citizen of EU member states.
- ▶ Individuals can be held personally liable if the data access and use policy is in place, but is blatantly disregarded

* *Global Turnover/Revenue*


Where to start...

IEEE's GDPR Resources Page



The screenshot shows the IEEE website's 'Policy on GDPR' page. The page has a dark blue header with the IEEE logo and the title 'IEEE Policy on GDPR'. Below the header is a navigation menu with links for 'Home', 'OU Analytics', 'Mailing List Requirements', 'Website Requirements', 'Training', 'Policies', and 'FAQs'. The main content area is titled 'GDPR Overview' and contains several paragraphs of text explaining IEEE's commitment to data privacy and the impact of the GDPR regulation.

IEEE Policy on GDPR



Home OU Analytics Mailing List Requirements Website Requirements Training Policies FAQs

GDPR Overview

IEEE understands that, in an increasingly data-driven world, keeping personal data private is becoming more difficult. Most importantly, we care about you and respect and value your time. IEEE wants to ensure that we provide to you the tools necessary to perform your IEEE responsibilities in a compliant and efficient way.

A new regulation called the General Data Protection Regulation (GDPR) takes effect on 25 May 2018 and is expected to have far-reaching impact on how business will be conducted worldwide.

IEEE has been carefully reviewing and redesigning its privacy policy, business processes, and how IEEE collects, uses, shares and retains the personal data of its members, customers, volunteers, and professional staff worldwide.

For IEEE volunteers, the current process of collecting personal data and emailing on behalf of IEEE will change and impact your day-to-day IEEE volunteer activities. A new process for collecting and using personal data will be communicated.

For IEEE members, IEEE respects your privacy and wants to honor the way that you wish to receive communications. Control is in your hands. Our goal is to continue to provide our members with valuable IEEE updates, information on new products and services, and opportunities in a way that best fits each member. You will be asked to provide consent for us to continue to share the communications you value and may already receive.

Please continue to visit this site for continuous updates.

For more information on GDPR, please click [here](#).

sites.ieee.org/gdpr/

What Can You Do Now

- ▶ ALL IEEE volunteers must become knowledgeable on how to comply with the regulation
- ▶ If you are not using vTools eNotice, consider making the switch for your email communications.
 - eNotice will automatically apply all the necessary communication preferences thereby keeping you compliant with GDPR.
- ▶ If you are using ListServ, insure your list is managed, has a welcome message, and the opt-out text at the bottom of every Email.
- ▶ Take the time to delete any old member lists you may have stored locally.

Our Request to You

GDPR FAQ

https://supportcenter.ieee.org/app/answers/detail/a_id/3023/kw/gdpr

- ▶ Be engaged—this impacts all of IEEE including all partners that we work with
- ▶ Ask questions (privacypolicy@ieee.org)
- ▶ Be alert for communications about GDPR (see FAQ)
- ▶ Be prepared to communicate and take action within your Chapter
- ▶ Be patient
- ▶ Best practices for handling private data, consent and compliance language, internal operational changes etc..., for an association with our global reach, do not exist. They are being developed and will be available shortly.

PACE

Professional Activities (PACE)

ieeer5.org/member-opportunities/professional-activities-pace/

WEATHER - Austin... Soccer Fields Slaug... Monthly... Communities Death Financial Fun Health Travel Upcoming Talks

IEEE.org | IEEE Xplore Digital Library | IEEE Standards Association | IEEE Spectrum Online | More IEEE Sites

IEEE Region 5 News and Information

IEEE GreenTech Conference | Region 5 Annual Meeting

Home News Areas Governance Awards **Membership Activities** Contact

Search IEEE Region 5 Search

Home > [Membership Activities](#) > Professional Activities (PACE)

Membership Activities

- Life Members
- Region 5 Educational Activities Programs and Services
- Student Activities
- Young Professionals
- Women in Engineering (WIE)
- Professional Activities (PACE)**
- Standards Association (SA)

Professional Activities (PACE)

Professional Activities

IEEE-USA makes funds available for the support of professional activities in IEEE Sections and Societies. The funds are managed and distributed through the Region. The R5 funding request form (no login required) and other documentation is available in the [2018 PACE folder](#).

In general, to obtain funding, a Section or Society PACE Chairs must complete a Section Project Plan and Financing Request form, obtain supporting signatures, and file the form with their Regional PACE Coordinator. The forms are available here:

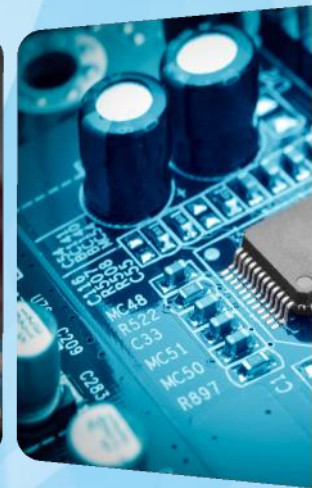
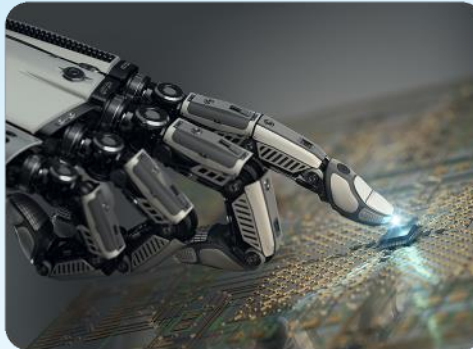
[IEEE-USA PACE funding form](#)

When a project is completed, the [Final Project Report form](#) must be filed with the same individuals.

If you have questions, please contact the Region 5 PACE Chairman at pacechair@ieeer5.org.

Examples of Chapter Professional Activities Programs

- ▶ Panel Sessions at Technical Meetings
- ▶ Keynote Luncheon Speaker
- ▶ Tutorials on Professional Topics
- ▶ IEEE Day Event with a Speaker



Thank You!

* Access this training content via the [Central Texas Section Website](#)