* V-Tools - L31 Reporting
  * LISTSERV
  * Other tools

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Tutorial for Region 1 and 7
January 16, 2015
Overview

• **vTools.Meetings**
  – About vTools
  – About vTools. Meetings
    • Scheduling Meetings
    • L31 Meeting Reporting
    • Find Meetings (recent/upcoming meetings)

• **LISTSERV**
  – Subscribing to Existing Lists
  – Starting a New List
  – Managing a List
  – More Information

• **Other tools (link share)**
  – Section Vitality Dashboard
  – SAMIEEE
About vTools

• A portfolio of software tools for volunteers and staff to support the IEEE members
• Sponsored by IEEE Membership and Geographic Activities (MGA)
• vTools: More information and tutorial: http://sites.ieee.org/vtools/training/
About vTools (cont’d)

Current portfolio (please check for updated information):

• In Production:
  – **Meetings**
  – WebInABox
  – Voting
  – Web Conferencing - WebEx
  – Blog and CMS tool – WordPress (staff, branded)
  – Survey tool – Chide.it Inc. (branded)
  – ReviewRoom – Chide.it Inc.

• Pilot (Beta)
  – Officer Reporting
  – Student Branch Reporting

• Recommended Tool
  – Doodle
About vTools.Meetings

• A tool for managing Section and Chapter meetings
• Major functions:
  – Scheduling Meetings
  – L31 Meeting Reporting
  – Find Meetings (recent/upcoming meetings)
• Accessibility:
  – Limited to volunteers listed in the Geographic Activities Roster
  – Integrated with myIEEE
  – https://meetings.vtools.ieee.org/main
Scheduling Meetings

• Officers can create and promote meeting announcements
• Members and the public may also see and register
• Provides a form for entering meeting info: (who/what/when/where/registration)
• Displays meeting list online (anywhere)
• Handles registrations (start, end, limit)
• Credit Card registration payments for R1-R7 with deposits to Concentration Banking (support for R8-R10 is being investigated)
• Provides registration list and nametags file
• Various feeds: RSS, XML, iCal
Scheduling Meetings (cont’d)

Login at: https://meetings.vtools.ieee.org/main

Scheduling Meetings (cont’d)

Enter meeting details

Scheduling Meetings (cont’d)

- Select ‘Start Time’ and ‘End Time’
- Select ‘Registration Starts’ and ‘Registration Deadline’
- Leave ‘Registration Starts’ and ‘Registration Deadline’ to the default to skip registration

[start_time]

[registration_starts]

[end_time]

[registration_deadline]

[time_zone]

Scheduling Meetings (cont’d)

- **No Admission Charge**
  - no admission charge
  - admission charge (Optional food or facility expenses are not considered an admission charge (**used for L31 report))
  - optional charges not required to attend meeting (food, etc.)

- **Admission Charge**
  - Pricing
    - There is a single price level for all meeting attendees.
      - Amount: ___________
    - There are multiple price levels for meeting attendees (ex: student, member, non-member)
      - Price level description: ___________ Amount: ___________
      - Price level description: ___________ Amount: ___________
      - Price level description: ___________ Amount: ___________
  - Currency (preset based on your CBRS account): USD
  - Time of payment
    - This fee is required to be paid by credit card at the time of registration.
    - This fee is NOT required at the time of registration and can be paid in person by check or cash at the meeting.
    - Make fee optional
    - This fee is optional (ex: it is for an optional dinner)

Scheduling Meetings (cont’d)

• Address of meeting
• URL for map
• URL for other registration system
  – Not necessary if using vTools for registration.
• URL for Survey
• Header and Footer for web page
• Meeting contact name and email address
• Enter speaker information
Scheduling Meetings (cont’d)

Meeting page created with registration open

L31 Meeting Reporting

• Minimum meeting requirements to earn a rebate each year are five (5) meetings for Sections and Subsections, two (2) technical meetings for Chapters, and two (2) meetings for Affinity Groups.
• For Joint meetings, a form should be completed for each entity in order to count as two (2) separate meetings.
• Meeting reports should be submitted to IEEE Member and Geographic Activities (MGA) after each meeting is held.
• Report all meetings, including social events and administrative meetings.
• E-mail a copy of your meeting report to your Section Secretary and others by using the e-mail field at the bottom of the form.
L31 Meeting Reporting (cont’d)

Welcome to the IEEE vTools Meeting System

Click on “L31 Meeting Reports.”

http://sites.ieee.org/vtools/documents/2013/10/7-creating-searching-l31-reports.ppt
There are two ways of creating an L31 report:

1) You can create L31 reports for meetings not in the system. In other words, if you did not use the Meetings tool to create a meeting notice, you can still create and submit L31.

2) You can create an L31 report based on a meeting notice you created earlier.

Let us first look at how you can create an L31 for meetings that are not in the system.

Select “Create an L31 Meeting Report (for meeting not in the system)” link.
Specify data required by the L31.
L31 Meeting Reporting (cont’d)

Meeting Report Form

Please fill out the event information below to create this meeting report.

- **Event Title:** (256 chr max)
- **Event Category:** Event sub-category:
  - Select one
- **Event Description in Format:** Text
- **Technical presentation by Dr. Andrews on cyclotrons. Dr. Andrews overviewed technology evolution from past to present. He also presented future direction for developing new cyclotrons.**
- **Meeting Keywords:** (512 chr max)
  - cyclotron, Dr. Andrews
- **Guest Attendance:**
- **IEEE Member Attendance:**

Admission Charge? (Optional food or facility expenses not considered an admission charge)

- **Select Region:**
- **Select Section:** PHILADELPHIA
- **Select Organizational Unit:**

- **Start Time:** 28 Jun 2013 14:00
- **End Time:** 28 Jun 2013 18:00 (Maximum duration of meeting - 5 days)
- **Time Zone:** EST
- **City:** (128 chr max)

- **Piscataway**
  - **State/Province:**
    - United States
  - **Cosponsor Name:** (256 chr max) Meeting Contact E-mail:

- **Give “Meeting Contact E-mail” address**
- **Click on the button to “Show 1st speaker_report,” then fill in the details about the speaker.**

http://sites.ieee.org/vtools/documents/2013/10/7-creating-searching-l31-reports.ppt
If the lecturer is distinguished, make sure to select this box.

Once all the details are entered, click “Create.”

http://sites.ieee.org/vtools/documents/2013/10/7-creating-searching-l31-reports.ppt
If you miss any of the required information, the tool will show validation errors. Correct them as necessary.

http://sites.ieee.org/vtools/documents/2013/10/7-creating-searching-l31-reports.ppt
L31 Meeting Reporting (cont’d)

Click "Create" to save changes.

http://sites.ieee.org/vtools/documents/2013/10/7-creating-searching-l31-reports.ppt
L31 Meeting Reporting (cont’d)

You can edit the report by clicking on the “Edit” link

http://sites.ieee.org/vtools/documents/2013/10/7-creating-searching-l31-reports.ppt
Finding Meetings

• Find Meetings (recent/upcoming meetings)
• Find, Edit, Cancel, and Delete an Existing Meeting
• Using existing Meeting as a template in creating a new Meeting Notice
• Registration functionality and Meeting Statistics
• Creating and Searching L31 Reports
Now let’s take a quick look at how you can create an L31 report based on an existing meeting notice. Click on “Find Meetings.”

http://sites.ieee.org/vtools/documents/2013/10/7-creating-searching-l31-reports.ppt
Finding Meetings (cont’d)

Click on “Recent Meetings for my Section”

http://sites.ieee.org/vtools/documents/2013/10/7-creating-searching-l31-reports.ppt
Finding Meetings (cont’d)

- vTools.Meetings: More information and tutorial
- http://sites.ieee.org/vtools/vtools-meeting-tutorials/

vTools Meeting Tutorials

Click on the following links to download the PowerPoint tutorials:

1. Schedule a meeting - Training Intro (PPT) (PDF)
2. Find, Edit, Cancel, and Delete an Existing Meeting (PPT) (PDF)
3. Using existing Meeting as a template in creating a new Meeting Notice (PPT) (PDF)
4. Registration functionality and Meeting Statistics (PPT) (PDF)
5. Creating Menu Tag and Name Tags (PPT) (PDF)
6. Creating and Searching L31 Reports (PPT) (PDF)
7. How to automatically fill in fields in similar L31 reports (PPT) (PDF)
8. Payment Functionality and Pricing Levels (PPT) (PDF)
9. Meeting Notice feeds and iCal Functionality (PPT) (PDF)
10. Finding a meeting in vTools and MyIEEE (PPT) (PDF)
LISTSERV

• LISTSERV – developed by L-Soft, is an e-mail list management software

• This mailing lists
  – allows sending emails to one address and have it automatically forwarded to a list of recipients
  – offers a variety of e-mail list types including announcement-only and discussion groups (moderated or un-moderated)
  – allows list owners to maintain their lists through e-mail or web-browser interfaces.
Subscribing to Existing Lists

- Visit: LISTSERV Archives at https://listserv.ieee.org/cgi-bin/wa?INDEX
- Many LISTSERV selections do not require a login.
- The first time you see the screen Login Required you will have to create a LISTSERV E-mail Address and Password.
- Click Obtaining a login account and password for more information about e-mail addresses and passwords.
Starting a New List

• Review The LISTSERV policy statement
  http://eleccomm.ieee.org/email-aup.shtml

• Review The IEEE Mailing-Lists Overview
  http://eleccomm.ieee.org/maillist.shtml

• Request a new mailing list
  https://listserv.ieee.org/request/add-listserv.html
Managing a List

- Subscriber management
- List configuration wizard
More Information

• Listserv Owners Manual

• Listserv Owner FAQ
  http://www.lsoft.com/manuals/owner-faq.stm
Other Tools

- SAMIEEE
  http://www.ieee.org/about/volunteers/samieee/index.html
  Please try logging in. Tutorial coming up.

- Section Vitality Dashboard
  http://www.ieee.org/societies_communities/geo_activities/dashboard.html
Summary

• vTools and LISTSERV are powerful tools
• May require trial and errors at the initial stage, but guaranteed to maximize efficiency
• Visit vTools and LISTSERV websites for updates, FAQs, manuals and tutorials
• SAMIEEE tutorial coming up.