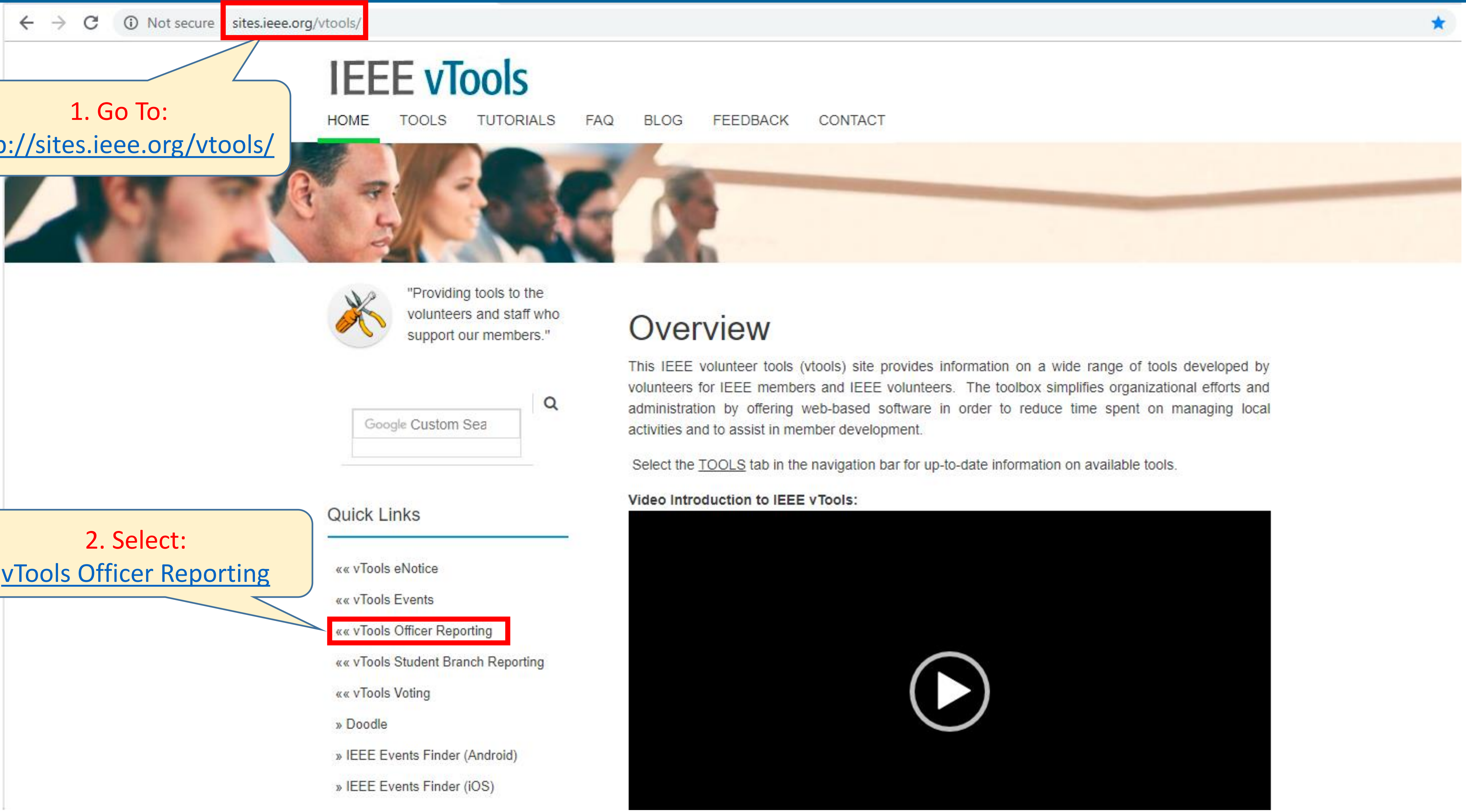
How to Report Officers Using vTools

A Guide to Reporting Your Chapter Officers

Before you begin the reporting process:

1. Have every officer's IEEE Member number (All officers MUST be Active IEEE members.)
2. Only one individual should report ALL positions for the Chapter during a single submission.
3. Make sure the position titles you fill start with: HKN (See slide 5.)
4. Your chapter may have officers whose titles do not exist in the vTools system (i.e. HKN-Webmaster or HKN-Compliance Officer). Please choose an appropriate title from those available:
    - HKN-Department Head
    - HKN-Faculty Adviser
    - HKN-Chapter President
    - HKN-Chapter Vice President
    - HKN-Chapter Corresponding Secretary
    - HKN-Chapter Recording Secretary
    - HKN-Chapter Treasurer
    - HKN-Chapter Officer (You can add up to three officers using this title.)
5. For any questions, contact info@hkn.org

How to report officers using vTools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"Providing tools to the volunteers and staff who support our members."

Quick Links

- «« vTools eNotice
- «« vTools Events
- «« vTools Officer Reporting
- «« vTools Student Branch Reporting
- «« vTools Voting
- » Doodle
- » IEEE Events Finder (Android)
- » IEEE Events Finder (iOS)

Overview

This IEEE volunteer tools (vtools) site provides information on a wide range of tools developed by volunteers for IEEE members and IEEE volunteers. The toolbox simplifies organizational efforts and administration by offering web-based software in order to reduce time spent on managing local activities and to assist in member development.

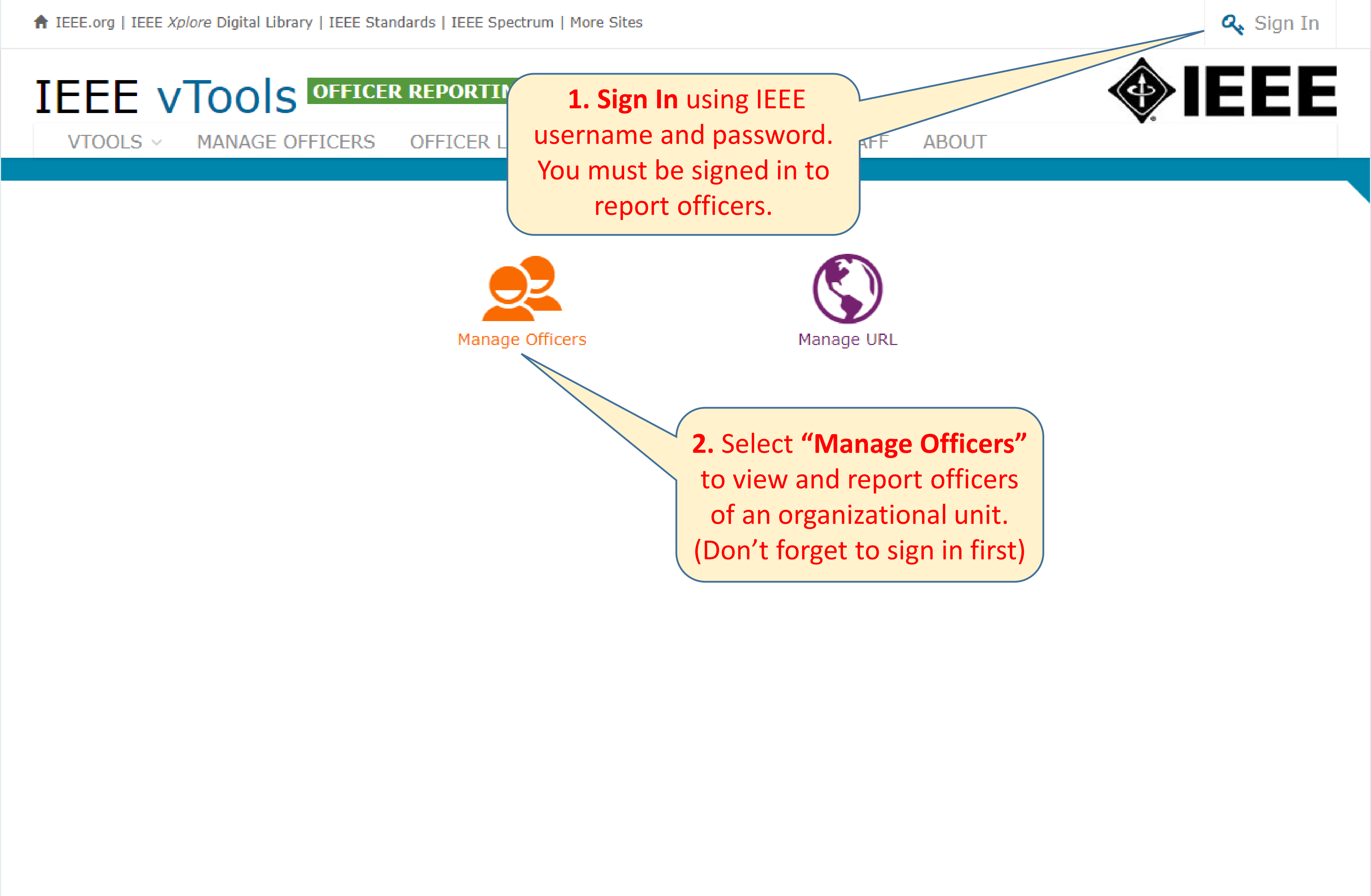
Select the TOOLS tab in the navigation bar for up-to-date information on available tools.

Video Introduction to IEEE vTools:

1. Go To:
http://sites.ieee.org/vtools/

2. Select:
vTools Officer Reporting

Sign In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Sign In
IEEE vTools
OFFICER REPORTIN
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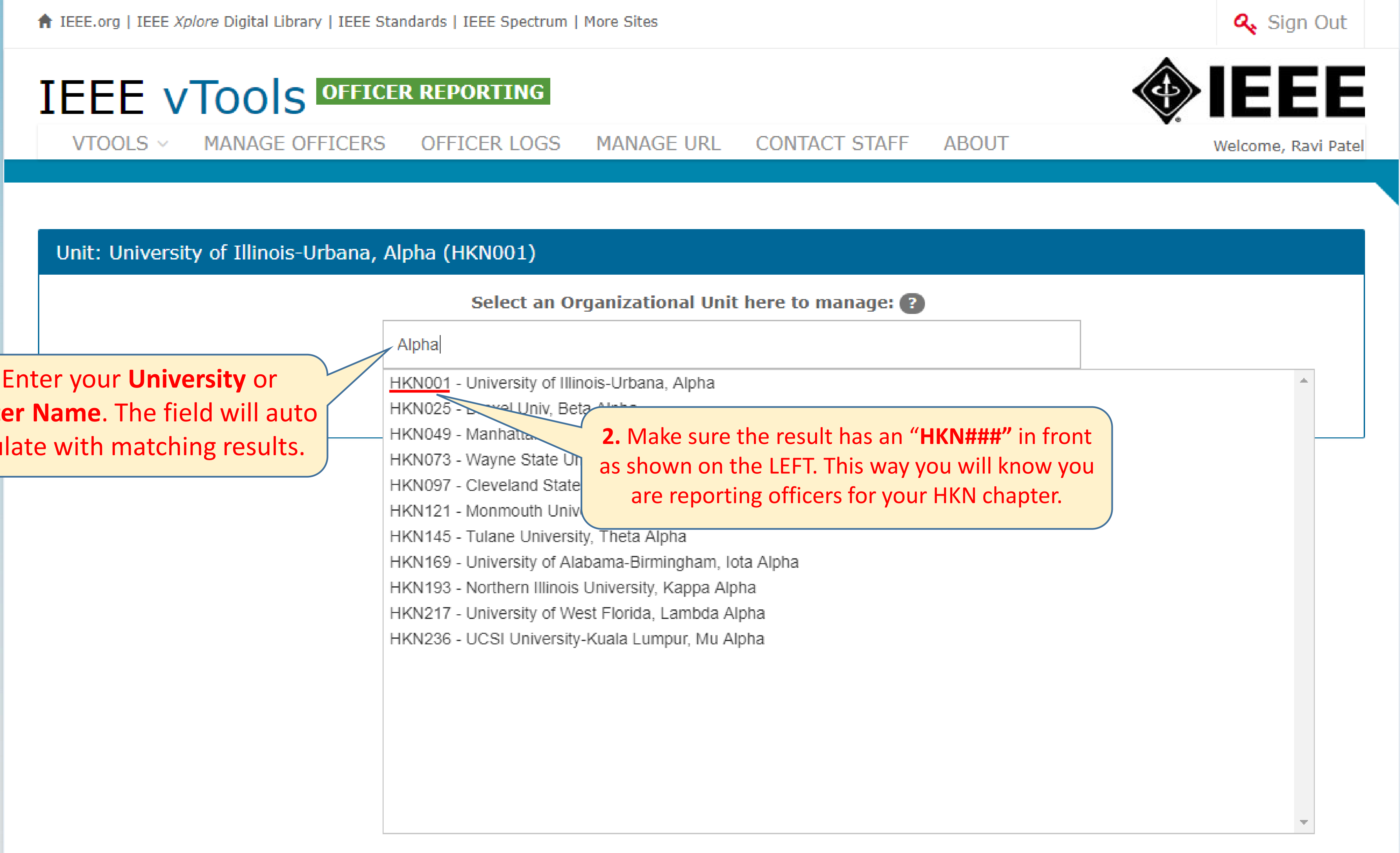
AFF
ABOUT
Manage Officers
Manage URL

1. Sign In using IEEE username and password. You must be signed in to report officers.

2. Select **“Manage Officers”** to view and report officers of an organizational unit. (Don’t forget to sign in first)

Select Organizational Unit



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Sign Out
IEEE vTools OFFICER REPORTING
IEEE
VTOOLS
MANAGE OFFICERS
OFFICER LOGS
MANAGE URL
CONTACT STAFF
ABOUT
Welcome, Ravi Patel

Unit: University of Illinois-Urbana, Alpha (HKN001)

Select an Organizational Unit here to manage: ?

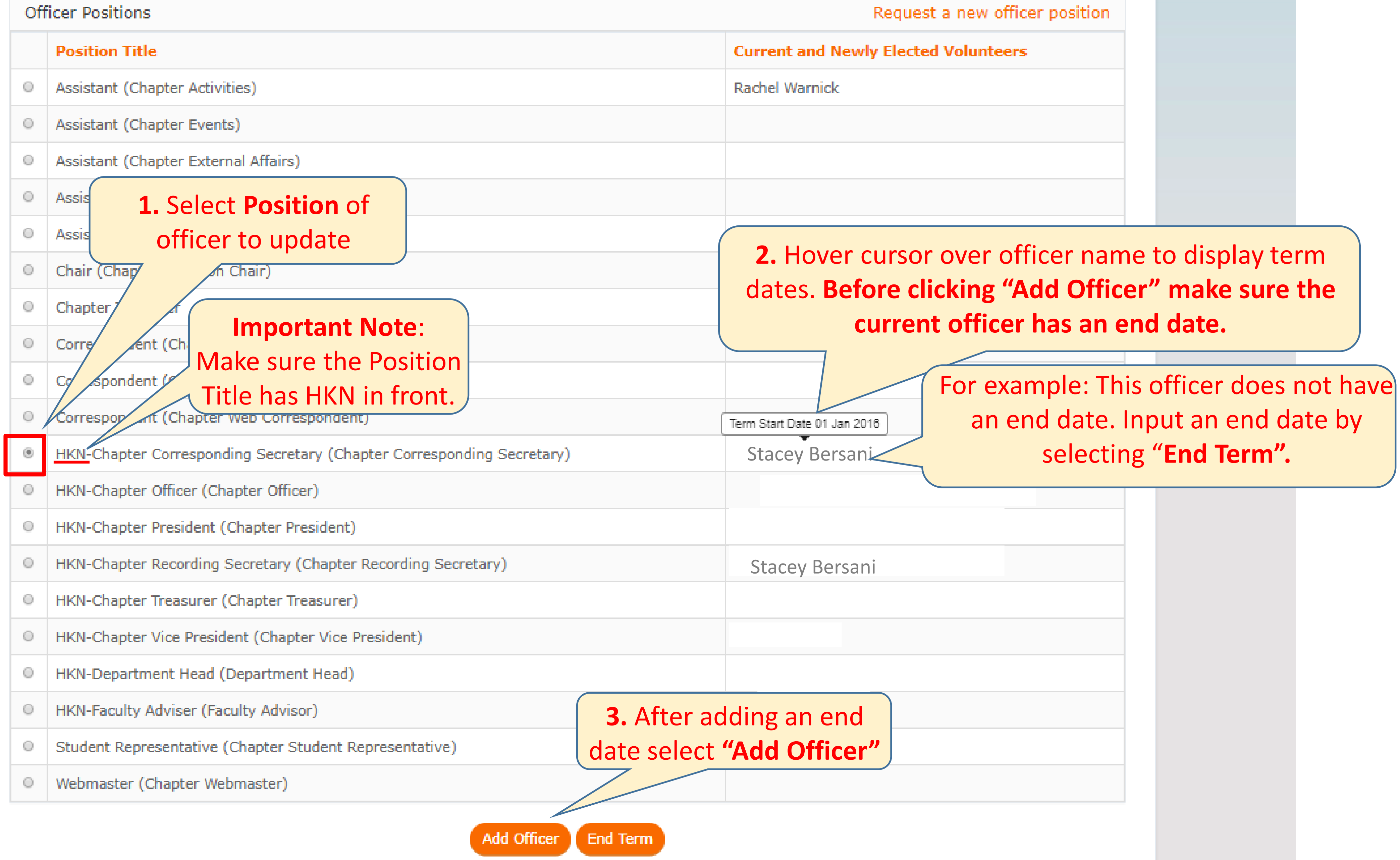
Alpha

HKN001 - University of Illinois-Urbana, Alpha
HKN025 - Drexel Univ, Beta Alpha
HKN049 - Manhatta
HKN073 - Wayne State Un
HKN097 - Cleveland State
HKN121 - Monmouth Univ
HKN145 - Tulane University, Theta Alpha
HKN169 - University of Alabama-Birmingham, Iota Alpha
HKN193 - Northern Illinois University, Kappa Alpha
HKN217 - University of West Florida, Lambda Alpha
HKN236 - UCSI University-Kuala Lumpur, Mu Alpha

1. Enter your **University** or **Chapter Name**. The field will auto populate with matching results.

2. Make sure the result has an **"HKN###"** in front as shown on the LEFT. This way you will know you are reporting officers for your HKN chapter.

Adding An Officer



Officer Positions

Request a new officer position

	Position Title	Current and Newly Elected Volunteers
○	Assistant (Chapter Activities)	Rachel Warnick
○	Assistant (Chapter Events)	
○	Assistant (Chapter External Affairs)	
○	Assis	
○	Assis	
○	Chair (Chap n Chair)	
○	Chapter r	
○	Corre ent (Ch	
○	Co spondent (	
○	Correspon nt (Chapter Web Correspondent)	
●	HKN-Chapter Corresponding Secretary (Chapter Corresponding Secretary)	Term Start Date 01 Jan 2016 Stacey Bersani
○	HKN-Chapter Officer (Chapter Officer)	
○	HKN-Chapter President (Chapter President)	
○	HKN-Chapter Recording Secretary (Chapter Recording Secretary)	Stacey Bersani
○	HKN-Chapter Treasurer (Chapter Treasurer)	
○	HKN-Chapter Vice President (Chapter Vice President)	
○	HKN-Department Head (Department Head)	
○	HKN-Faculty Adviser (Faculty Advisor)	
○	Student Representative (Chapter Student Representative)	
○	Webmaster (Chapter Webmaster)	

1. Select **Position** of officer to update

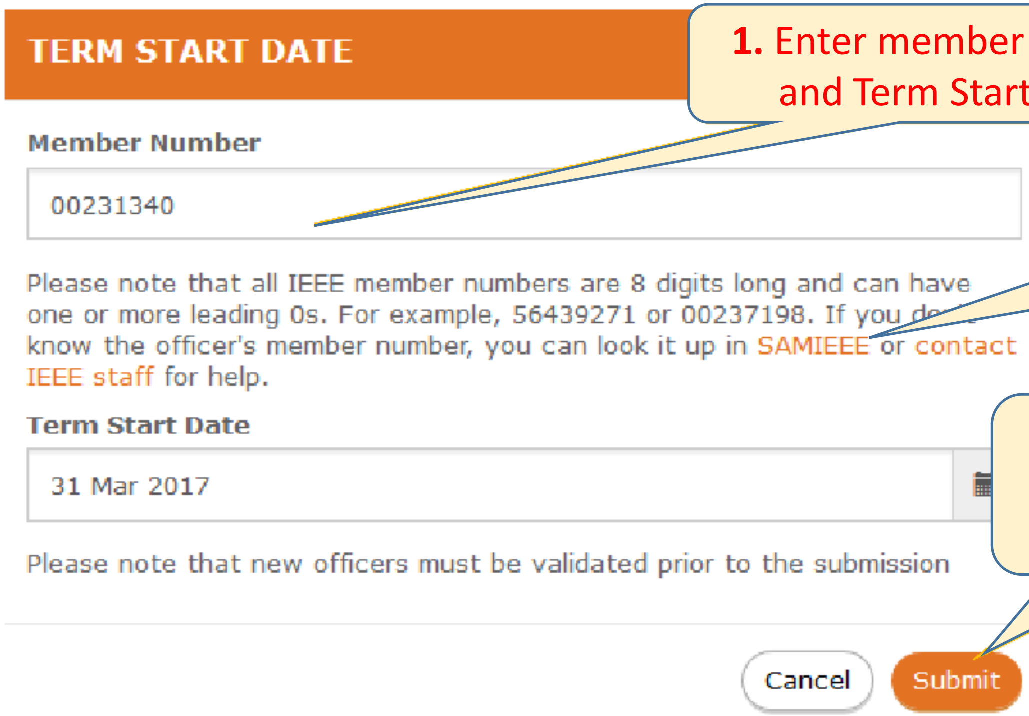
Important Note: Make sure the Position Title has HKN in front.

2. Hover cursor over officer name to display term dates. **Before clicking "Add Officer" make sure the current officer has an end date.**

For example: This officer does not have an end date. Input an end date by selecting "**End Term**".

3. After adding an end date select **"Add Officer"**

Add Officer number and term date



TERM START DATE

Member Number

00231340

Please note that all IEEE member numbers are 8 digits long and can have one or more leading 0s. For example, 56439271 or 00237198. If you don't know the officer's member number, you can look it up in SAMIEEE or contact IEEE staff for help.

Term Start Date

31 Mar 2017

Please note that new officers must be validated prior to the submission

1. Enter member number and Term Start Date

Finding a IEEE number? (slides 7-9)

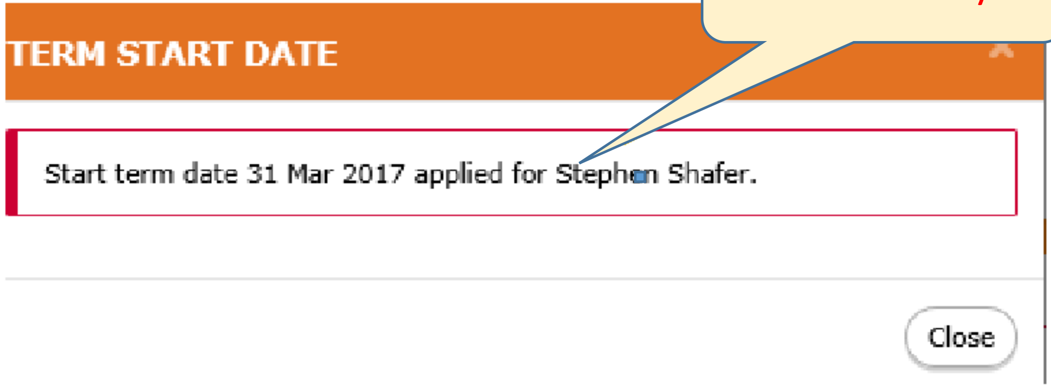
a. Ask Chapter Officers for member numbers

b. Click **“SAMIEEE”** to search member number

2. Click on “Submit” to validate.

The system will retrieve member data and validate that (s)he is eligible to serve in the position based on IEEE rules.

Term Date updated automatically.

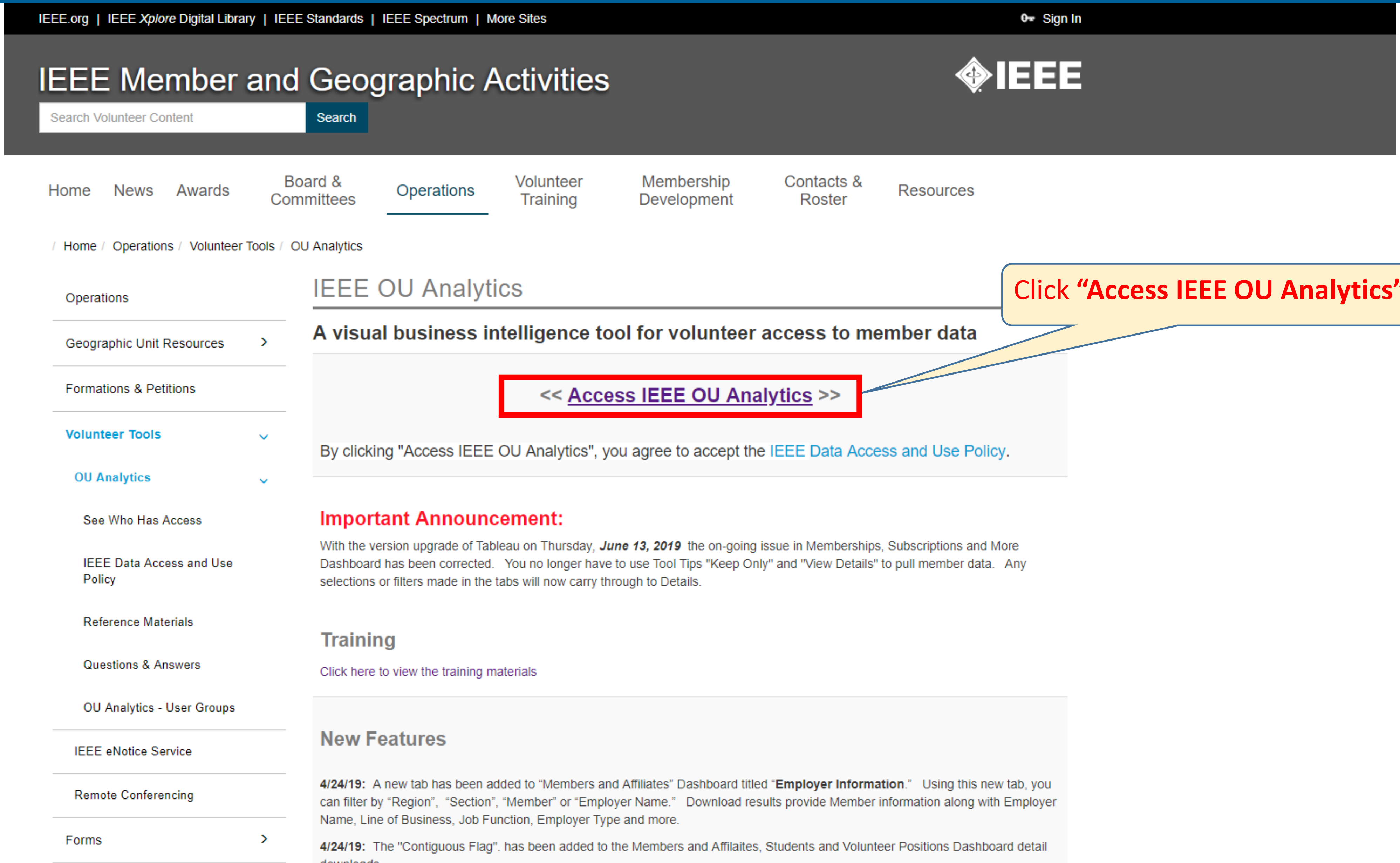


TERM START DATE

Start term date 31 Mar 2017 applied for Stephen Shafer.

Finding a Member Number

(If you clicked SAMIEEE you will see this page)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Operations
Geographic Unit Resources
Formations & Petitions
Volunteer Tools
OU Analytics
See Who Has Access
IEEE Data Access and Use Policy
Reference Materials
Questions & Answers
OU Analytics - User Groups
IEEE eNotice Service
Remote Conferencing
Forms

IEEE OU Analytics

A visual business intelligence tool for volunteer access to member data

<< Access IEEE OU Analytics >>

By clicking "Access IEEE OU Analytics", you agree to accept the IEEE Data Access and Use Policy.

Important Announcement:

With the version upgrade of Tableau on Thursday, ***June 13, 2019*** the on-going issue in Memberships, Subscriptions and More Dashboard has been corrected. You no longer have to use Tool Tips "Keep Only" and "View Details" to pull member data. Any selections or filters made in the tabs will now carry through to Details.

Training

Click here to view the training materials

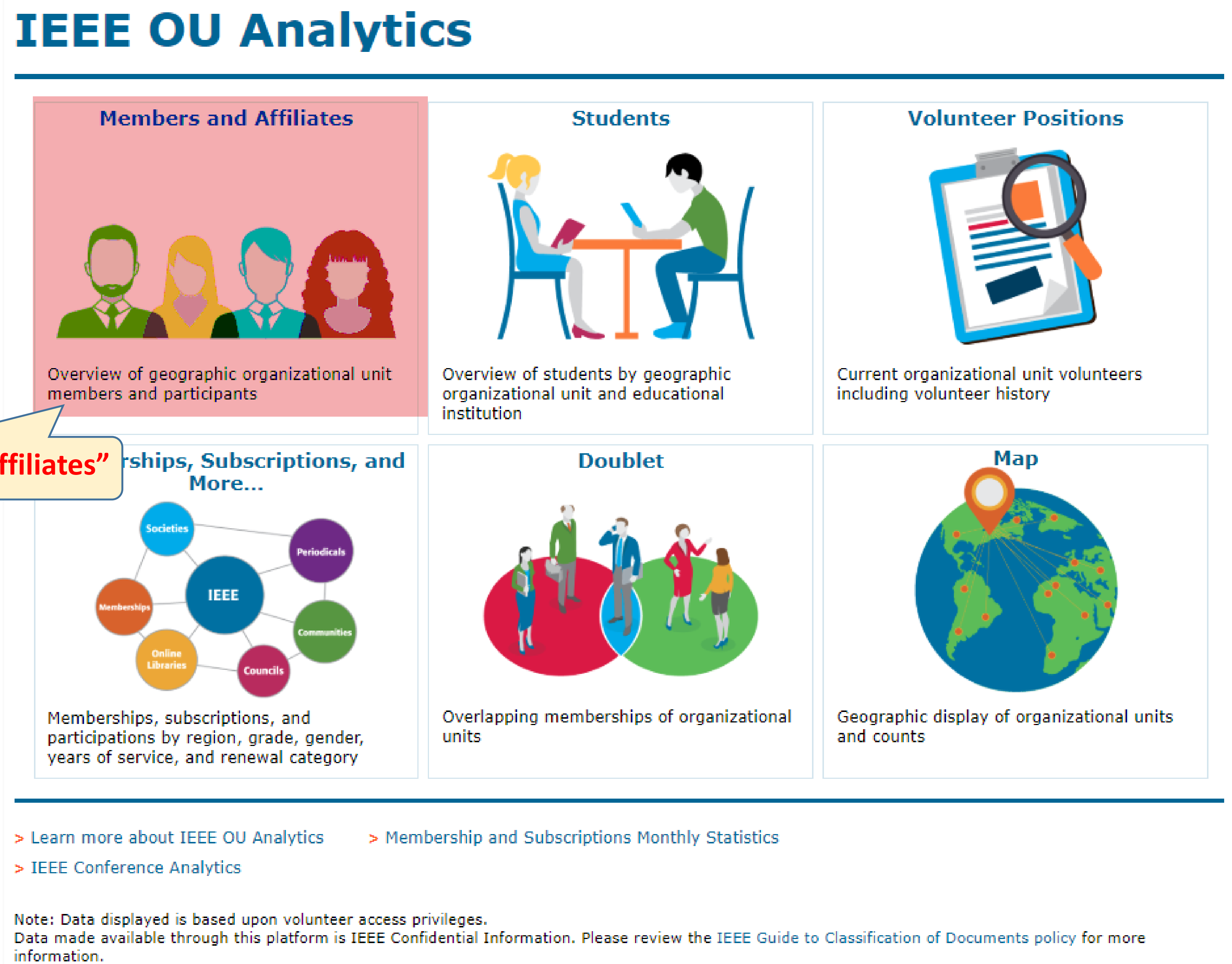
New Features

4/24/19: A new tab has been added to "Members and Affiliates" Dashboard titled "**Employer Information**." Using this new tab, you can filter by "Region", "Section", "Member" or "Employer Name." Download results provide Member information along with Employer Name, Line of Business, Job Function, Employer Type and more.

4/24/19: The "Contiguous Flag". has been added to the Members and Affilaites, Students and Volunteer Positions Dashboard detail

Click **"Access IEEE OU Analytics"**

Finding a Member Number



IEEE OU Analytics

Members and Affiliates

Overview of geographic organizational unit members and participants

Select **“Members and Affiliates”**

Students

Overview of students by geographic organizational unit and educational institution

Volunteer Positions

Current organizational unit volunteers including volunteer history

rships, Subscriptions, and More...

Memberships, subscriptions, and participations by region, grade, gender, years of service, and renewal category

Doublet

Overlapping memberships of organizational units

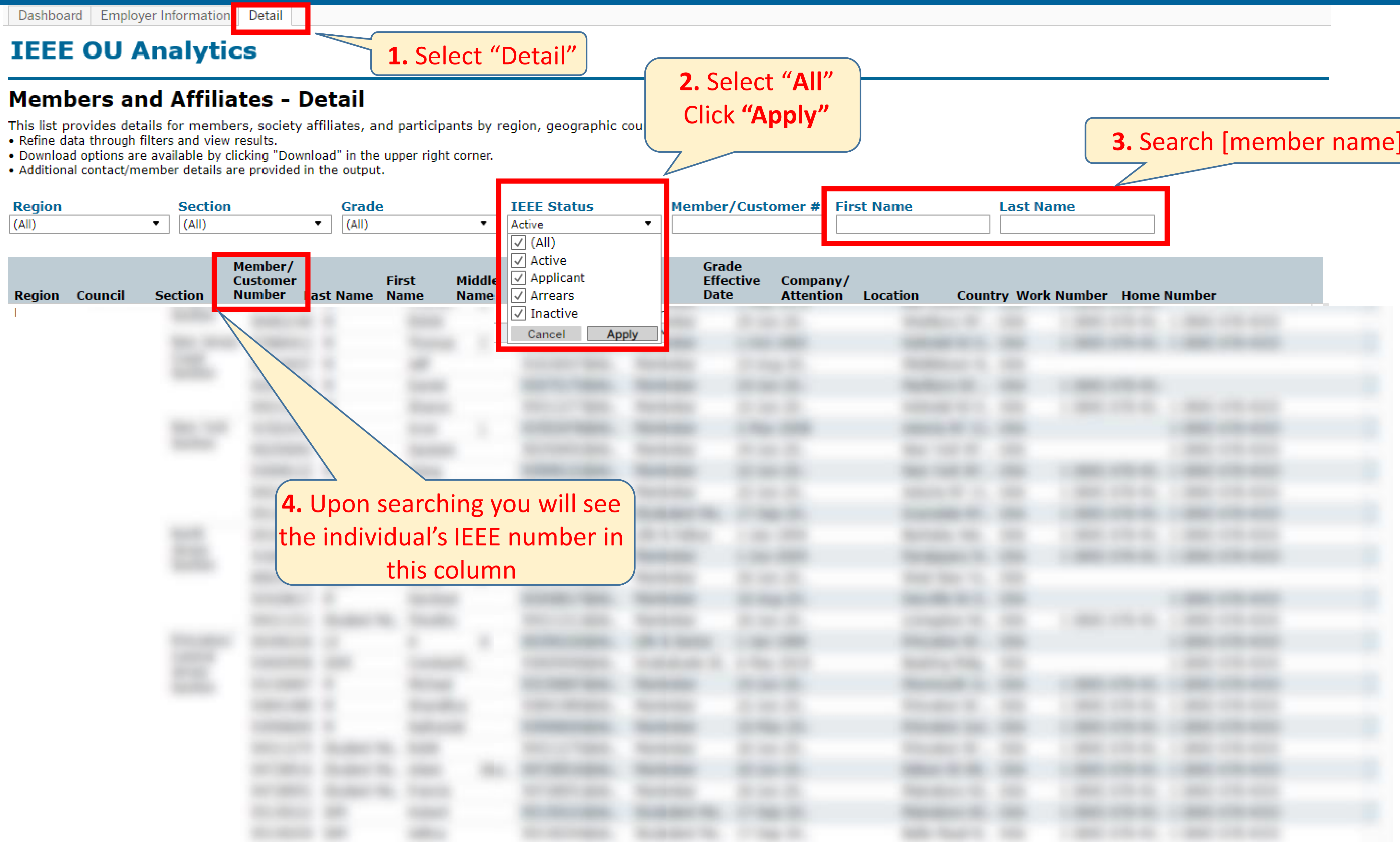
Map

Geographic display of organizational units and counts

- > Learn more about IEEE OU Analytics
- > Membership and Subscriptions Monthly Statistics
- > IEEE Conference Analytics

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.

Finding a Member Number



Dashboard
Employer Information
Detail

IEEE OU Analytics

Members and Affiliates - Detail

This list provides details for members, society affiliates, and participants by region, geographic cou

- Refine data through filters and view results.
- Download options are available by clicking "Download" in the upper right corner.
- Additional contact/member details are provided in the output.

Region: (All)
Section: (All)
Grade: (All)
IEEE Status: Active
Member/Customer #:
First Name:
Last Name:

☑ (All)
☑ Active
☑ Applicant
☑ Arrears
☑ Inactive
Cancel
Apply
Region
Council
Section
Member/ Customer Number
Last Name
First Name
Middle Name
Grade Effective Date
Company/ Attention
Location
Country
Work Number
Home Number

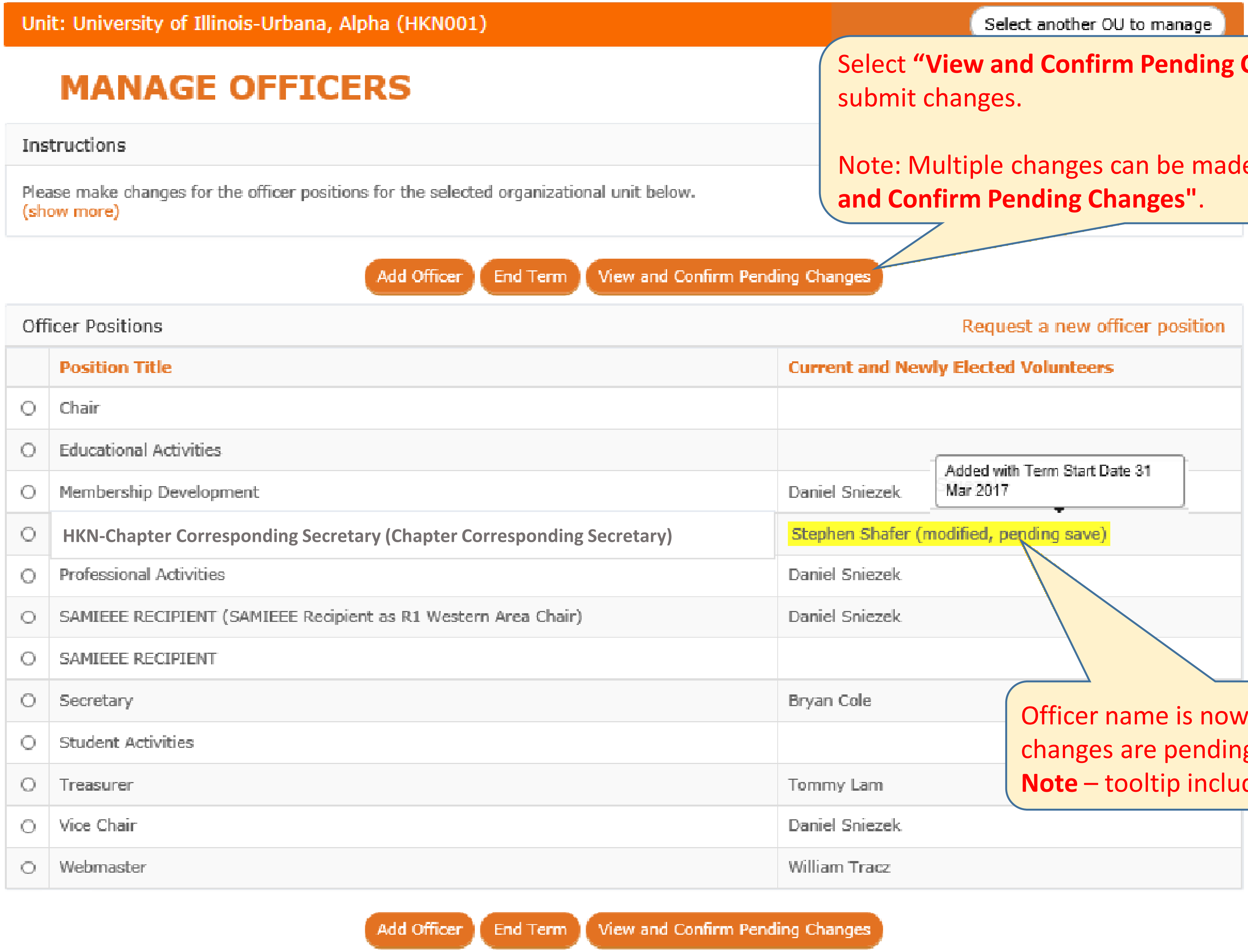
1. Select "Detail"

2. Select "**All**"
Click **"Apply"**

3. Search [member name].

4. Upon searching you will see the individual's IEEE number in this column

Pending changes for a position



Unit: University of Illinois-Urbana, Alpha (HKN001)

Select another OU to manage

MANAGE OFFICERS

Instructions

Please make changes for the officer positions for the selected organizational unit below.
(show more)

Add Officer
End Term
View and Confirm Pending Changes

Officer Positions

Request a new officer position

	Position Title	Current and Newly Elected Volunteers
○	Chair	
○	Educational Activities	
○	Membership Development	Daniel Sniezek
○	HKN-Chapter Corresponding Secretary (Chapter Corresponding Secretary)	Stephen Shafer (modified, pending save)
○	Professional Activities	Daniel Sniezek
○	SAMIEEE RECIPIENT (SAMIEEE Recipient as R1 Western Area Chair)	Daniel Sniezek
○	SAMIEEE RECIPIENT	
○	Secretary	Bryan Cole
○	Student Activities	
○	Treasurer	Tommy Lam
○	Vice Chair	Daniel Sniezek
○	Webmaster	William Tracz

Added with Term Start Date 31 Mar 2017

Add Officer
End Term
View and Confirm Pending Changes

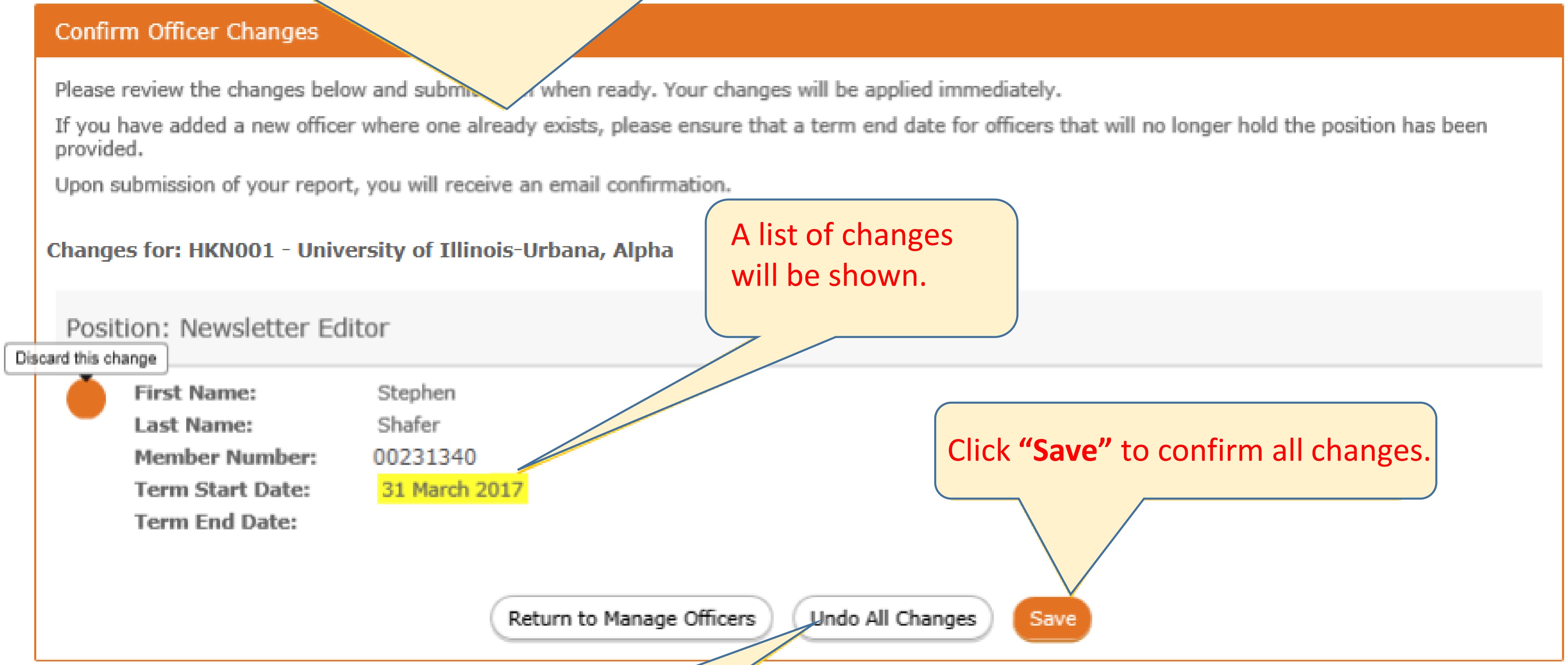
Select **"View and Confirm Pending Changes"** to review and submit changes.

Note: Multiple changes can be made before clicking on **"View and Confirm Pending Changes"**.

Officer name is now highlighted to show changes are pending.
Note – tooltip includes details of change.

Confirm Officer Changes

A notification will be sent to HKN Headquarters to confirm your officer update.



Confirm Officer Changes

Please review the changes below and submit when ready. Your changes will be applied immediately.

If you have added a new officer where one already exists, please ensure that a term end date for officers that will no longer hold the position has been provided.

Upon submission of your report, you will receive an email confirmation.

Changes for: HKN001 - University of Illinois-Urbana, Alpha

Position: Newsletter Editor

First Name:	Stephen
Last Name:	Shafer
Member Number:	00231340
Term Start Date:	31 March 2017
Term End Date:	

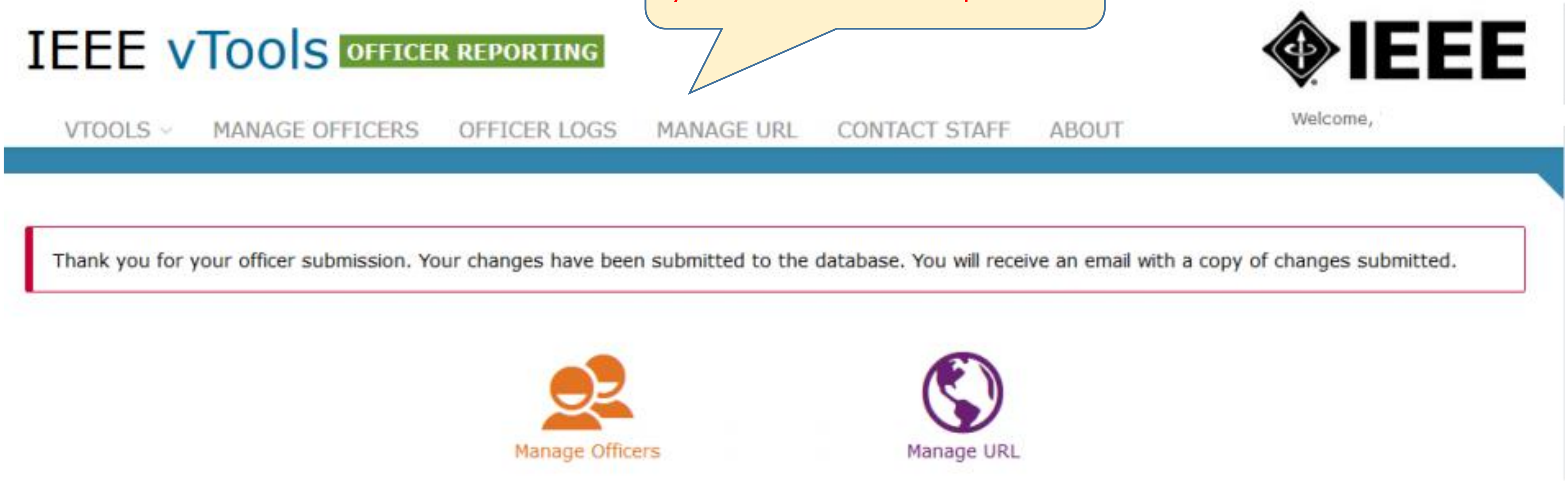
A list of changes will be shown.

Click **"Save"** to confirm all changes.

Click **"Undo All Changes"** to discard all pending changes.

Confirmation of report

This is the page you will see when your submission is complete.


IEEE vTools OFFICER REPORTING
IEEE
VTOOLS
MANAGE OFFICERS
OFFICER LOGS
MANAGE URL
CONTACT STAFF
ABOUT
Welcome,
Manage Officers
Manage URL

Thank you for your officer submission. Your changes have been submitted to the database. You will receive an email with a copy of changes submitted.