IEEE Region 3

vTools Training

April 1, 2017

Jill Gostin
Agenda

- What is/are vTools?
- IEEE Section Vitality Dashboard
- vTools eNotice
- vTools Events (Meetings)
- vTools Officer Reporting
- vTools Voting
What is/are vTools?

Overview

This IEEE volunteer tools (vtools) site provides information on a wide range of tools developed by volunteers for IEEE members and IEEE volunteers. Most of these tools have been developed by IEEE volunteers. The toolbox simplifies organizational efforts and administration by offering web-based software in order to reduce time spent on managing activities and to assist in member development. The tools are sponsored by IEEE Membership and Geographic Activities (MGA), which serves the needs of IEEE members by supporting IEEE Sections, Chapters, and Branches and is responsible for IEEE membership, and member development.

The vTools toolkit contains tools in various phases of development, from production, to pilots, to active development. Select the TOOLS tab in the navigation bar for up-to-date information on available tools.

Video Introduction to IEEE vTools:
What is/are vTools?

- IEEE Section Vitality Dashboard
- vTools eNotice
- vTools Events (Meetings)
- vTools Meetings Reporting (L31)
- vTools Officer Reporting
- vTools Student Branch Reporting
- vTools Surveys
- vTools Voting
- Doodle
- GoogleApps for OUs (G4Os)
- IEEE Collabratec
- IEEE Events Finder (Android)
- IEEE Events Finder (iOS)
- IEEE Web Hosting
- Listserv
- Remote Conferencing and Screencasting
- SAMIEEE
- WebEx Request Form

- Accessible by any volunteer on the Section roster.
- Login with IEEE username and password
- Members and in many cases non-members can view meeting info
- Anyone with an IEEE web account can submit and view L31 meeting reports and student branch reports
Section Vitality Dashboard

• Tabs for
  • Members; Active Student Members; Officers; Members in Arrears/Inactive; Pre-Arrears Members; Additional Member Lists; Meeting Activity; IEEE Conferences; Vitality Checklist

• Tables and Graphs, depending on the item

• **Meeting Activity** shows Scheduled and Reported meetings

• **IEEE Conferences** takes you to the Conferences Dashboard

• **Vitality Checklist** suggests things to do throughout the year
vTools eNotice (1 of 2)

- For sending out emails to your Organizational Unit (OU)
- Can specify a subset based on Member Grade or Membership Status
- Recommend using Chrome or Mozilla Firefox
- Sign in – if not set up, click on the Contact tab to request access
- List of eNotices allows you to view past/existing eNotices for your OU, and to create new eNotices
  - Be cautious of sending too many!
- Can preview, edit, duplicate, delete, and contact staff about existing eNotices
vTools eNotice (2 of 2)

- Create: Specify OU (only those allowed will show), grade, status, upload attachments, and enter message
- Click Submit when done (or save for later editing)
- eNotice Express sends without staff intervention
  - Only if no special requests, no automatic reminders, no attachments
  - Hit <confirm> to send, then sends within 2 hrs
- Staff-processed takes up to 5 business days
- Attachments post to a webpage and include a URL in the msg.
vTools Events (Meetings)

• Find existing Events
  • Search by Region, Section, type of event, OU, Society, date, location

• Create new Events
  • Enter details, host, location (and map), set up registration and payment, enter speaker info

• Edit an Event

• Report Events (L31)
  • New report, or for an existing event

• View Feeds
  • Useful links for extracting event info in an RSS feed format
vTools Officer Reporting

- Enter your OU
- Existing Positions and officer names will be shown
- Click on the radio button to make changes
- Option to Request a new Officer position
- You will need to know the IEEE member number for new officers
  - Member numbers are 8 digits (pad the front with 0s if necessary)
  - vTools will check to ensure the individual is eligible to serve
- View Logs to see all officer info and changes made
**vTools Voting**

- Create and manage ballots
- Run an election
- The Voting system uses SSL encryption to ensure that the data is transferred in a secured manner.
- Only officers will have access (must have been reported via Officer Reporting)
Select option to **manage your ballots**. This is the **Ballot Dashboard** for volunteers.
The Ballot Dashboard shows all of the ballots that you have created including: Active, Saved (Drafts), and Past Ballots.

You have an option to create a ballot from a template that has pre-defined officer positions. Using a template is not required.

The Ballot Dashboard shows all of the ballots created including: Active, Saved (Drafts), and Past Ballots. As the Election Manager, you have access to only those ballots you have created. This is to maintain the integrity of the election process.

Only the Election Manager has access to the results of this election.
Choose a Template

IEEE Voting

New Ballot
Select organization: Philadelphia Section
Choose template: Chair | Vice-Chair | Secretary | Treasurer
Create

Active Ballots
There are no entries to display.

Saved Ballots

<table>
<thead>
<tr>
<th>Name</th>
<th>Dates</th>
<th>Organization</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nomination of Candidates for Section Election</td>
<td>July 03, 2013 00:00 - July 12, 2013 23:59 Eastern Time (US &amp; Canada)</td>
<td>Princeton/Central Jersey Section</td>
<td>preview</td>
</tr>
<tr>
<td></td>
<td>May 19, 2013 00:00 - May 19, 2013 23:59 Eastern Time (US &amp; Canada)</td>
<td>Princeton/Central Jersey Section</td>
<td>preview</td>
</tr>
<tr>
<td></td>
<td>October 05, 2012 00:00 - October 05, 2012 23:59 Eastern Time (US &amp; Canada)</td>
<td>Orlando Section</td>
<td>preview</td>
</tr>
<tr>
<td></td>
<td>April 27, 2011 00:00 - April 27, 2011 23:59 Eastern Time (US &amp; Canada)</td>
<td>Princeton/Central Jersey Section</td>
<td>preview</td>
</tr>
</tbody>
</table>

Past Ballots

<table>
<thead>
<tr>
<th>Name</th>
<th>Dates</th>
<th>Organization</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia PES/IAS Joint Chapter</td>
<td>February 17, 2013 00:00 - March 03, 2013 23:59 Eastern Time (US &amp; Canada)</td>
<td>Philadelphia Section, Jt Chapter, PES/I, IA34</td>
<td>preview</td>
</tr>
</tbody>
</table>
Filling out the Ballot

Please enter ballot name: (up to 50 characters)

Please select time zone:
(GMT-05:00) Eastern Time (US & Canada)

Please select a starting and ending date and time for voting:
Open ballot on: September 10, 2015 12:00 AM
Close ballot on: September 10, 2015 11:59 PM

Please enter voter instructions: (up to 4000 characters)

Welcome to the <<Insert Ballot Name Here>> Election! I want to take this opportunity to personally express my sincere appreciation for you being an IEEE member!

Our duty and responsibility is to ensure that your voting rights are protected and that you are confident that your ballot is cast and tabulated. We will utilize the vTools.Voting system for our elections.

Please select one candidate for each position or specify a write-in candidate.

Please don't hesitate to contact me at <<Insert Email Address Here>> if you have a question, comment or concern.

Thank you for voting – your vote counts!
Filling out the Ballot

Enter a single email address. This email will appear as a link on the voter’s Ballot Dashboard under Contact Election Manager.

Add candidates for each position by clicking on the “Add new candidate…” link.

Select the number of candidates a voter can select for a position.

Check here to allow write-in candidates.
Candidate Information

Please enter candidate's member number: (up to 8 characters)

Please enter candidate's first name: (up to 100 characters)

Please enter candidate's last name: (up to 100 characters)

Please enter candidate's details - biography, reasons for running, etc: (up to 4000 characters)

Enter the candidate’s member number and click ‘Verify’. System will verify member’s eligibility.

Enter the candidate’s information, including first name, last name and short biography information here.

Click ‘Save’ when all candidate’s details have been entered.
Load an Image for the Candidates

Position: Chair
Candidate: Thomas Edison
Add new candidate to Chair position

You’ll return to this page where you may choose to add an image for the candidate.

Upload candidate's picture: (up to 50kB - GIF, JPEG, PNG)
Browse... No file selected.

Current picture:
No picture currently saved.
Close
Load and Save Candidate Image

Once you choose the file, click the “load” button to display the image below (as preview).

Click on the “Close” link after the picture is uploaded to return to editing the ballot.
Add more Candidates for Each Position

Positions and candidates
Please enter positions and candidates (position titles can be up to 50 characters):

Position: Chair
  Candidate: Thomas Edison
  Add new candidate to Chair position

Position: Vice Chair
  Add new candidate to Vice Chair position

Position: Secretary-Treasurer
  Add new candidate to Secretary-Treasurer position

Add new position
Allow write-in candidate for each position: 

Voters
Voters currently loaded: 0

Load voter list
Load voters for OU: R10329
To auto-load a list of voters, please enter your IEEE password: 

Save as draft  Save and activate  Cancel
Edit/Delete/Add a Position

Please enter a contact email in case users have any questions: (up to 50 characters)

Please enter positions and candidates: (position titles can be up to 50 characters)

Position: Chair  edit  delete
Candidate: Thomas Edison  edit  delete  manage picture
Candidate: Marchese Marconi  edit  delete  manage picture
Add new candidate to Chair position

Position: Vice-Chair  edit  delete
Add new candidate to Vice-Chair position

Position: Secr/Treas  edit  delete
Add new candidate to Secr/Treas position
Add new position

Allow write-in candidate for each position: □

You can edit or delete a position

Positions can easily be added by clicking on the “Add new position” link. Positions will need to be added if you did not use a template.

You can allow your voters to specify write in candidates for each position
Add a Voter List

To auto-load a list of voters, enter your IEEE password and click on “Load” to automatically retrieve the voter list.

Save your ballot as a draft once the voter list has been uploaded.
To Activate, Click on “Edit.”

The ballot will show under the “Saved Ballots” section. Select “preview” link to preview the ballot and check for any mistakes before it is activated.

Once the ballot is activated, no changes to the ballot are permitted.
Activate the Ballot

Please enter positions and candidates: (position titles can be up to 50 characters)

Position: Chair edit delete
  Candidate: Thomas Edison edit delete manage picture
  Candidate: Marchese Marconi edit delete manage picture
  Add new candidate to Chair position

Position: Webmaster edit delete
  Candidate: Marie Curie edit delete manage picture
  Add new candidate to Webmaster position

Position: Newsletter Editor edit delete
  Candidate: Alexandre Dumas edit delete manage picture
  Candidate: Mark Twain edit delete manage picture
  Add new candidate to Newsletter Editor position

Add new position

Allow write-in candidate for each position: ☑

After you make any necessary changes, you can activate the ballot.

Reminder: Once a ballot is activated, no changes are permitted.

Votees

Voters currently loaded: 5168 clear voter list

Load voter list
  Load voters for OU: R10329
  To auto-load a list of voters, please enter your IEEE password:

Save as draft Save and activate Cancel
Print version (pdf) of a ballot is to be sent via postal mail to those voters that do not have an email address.
You would compose and send email to your voters directly from vTools.Voting once the ballot has been activated. Email is not sent out automatically to your voters.

Click on “email” link to open the email editor window.

PLEASE NOTE: You must wait one hour after activating the ballot before you can send an email to your voters. Sending email before then might not work, i.e. no messages will be sent.
Email Voters of the Ballot

Note: Only 3 emails may be sent per ballot. Also, emails can only be sent once every 72 hours.
Organization: South Carolina Council (R303)
Timezone: Eastern Time (US & Canada)
Eligible voters: There is 1 registered voter
# of emails sent: 0 (out of 3 max)
Last email sent on: No emails have been sent.

All emails sent to voters will include the creator of the ballot as one of the recipients.

The following information is automatically included in the footer of each email sent to the voters:

To place your vote, go to https://voting.vtools.ieee.org. You will need your IEEE web account to vote. If you don’t have an IEEE web account, go to http://www.ieee.org/web/accounts. A web-based tutorial on how to vote is available at http://sites.ieee.org/vtools/documents/2013/10/3-voter-instructions-tutorial-pdf.pdf

To unsubscribe from the mailings regarding “Title of Ballot inserted here” please click here. Please note that this will not unsubscribe you from the e-mails regarding future elections.

Pre-populated content has been provided as a template that you may want to modify.

Note: A footer will be added to your message as follows:
To place your vote, go to https://voting.vtools.ieee.org. You will need your IEEE web account to vote. If you don’t have an IEEE web account, go to http://www.ieee.org/web/accounts. A web-based tutorial on how to vote is available at http://sites.ieee.org/vtools/documents/2013/10/3-voter-instructions-tutorial-pdf.pdf
To unsubscribe from the mailings regarding “Title of Ballot inserted here” please click here. Please note that this will not unsubscribe you from the e-mails regarding future elections.

Then click “Send.”
Email Log

You can view all of the emails that you have sent to the voters for this ballot by clicking on the "email log" link.

<table>
<thead>
<tr>
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<th>Dates</th>
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<th>Status</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>Ballot Name</td>
<td>July 23, 2013 00:00 – July 23, 2013 23:59 Eastern Time (US &amp; Canada)</td>
<td>Philadelphia Section</td>
<td>0% voted</td>
<td>manage</td>
</tr>
</tbody>
</table>

Email Log:

All emails sent to voters will include the creator of the ballot as one of the recipients.

Please click on e-mail subject to view its contents

<table>
<thead>
<tr>
<th>Subject</th>
<th>Sent on</th>
<th>Sent to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section Election Test 1</td>
<td>July 31, 2009 16:49 – Eastern Time (US &amp; Canada)</td>
<td>All voters</td>
</tr>
<tr>
<td>Reminder to vote in the Section Election Test 1</td>
<td>August 06, 2009 11:01 – Eastern Time (US &amp; Canada)</td>
<td>All voters</td>
</tr>
</tbody>
</table>
Change the Election End Date

If necessary, and approved by the election committee, you can change the end date of the election by clicking on the “manage” link. For example, you can extend the end date if you would like to give your members more time to vote.

Note: An election can not end earlier than the close date saved to the ballot.
View Election Results

### Active Ballots

<table>
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<th>Action</th>
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<tbody>
<tr>
<td>Ballot Name Here</td>
<td>July 23, 2013 00:00 - July 31, 2013 23:59</td>
<td>Philadelphia Section</td>
<td>0%</td>
<td>manage</td>
</tr>
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You can view the election results by clicking on the “manage” link.

### Saved Ballots

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<td>July 03, 2013 00:00 - July 12, 2013 23:59</td>
<td>Princeton/Central Jersey Section</td>
<td>preview</td>
</tr>
<tr>
<td></td>
<td>July 02, 2013 00:00 - July 02, 2013 23:59</td>
<td>Philadelphia Section</td>
<td>preview</td>
</tr>
<tr>
<td></td>
<td>July 02, 2013 00:00 - July 02, 2013 23:59</td>
<td>Philadelphia Section</td>
<td>preview</td>
</tr>
<tr>
<td></td>
<td>May 19, 2013 00:00 - May 19, 2013 23:59</td>
<td>Princeton/Central Jersey Section</td>
<td>preview</td>
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<tr>
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<td>October 05, 2012 00:00 - October 05, 2012 23:59</td>
<td>Orlando Section</td>
<td>preview</td>
</tr>
<tr>
<td></td>
<td>April 27, 2011 00:00 - April 27, 2011 23:59</td>
<td>Princeton/Central Jersey Section</td>
<td>preview</td>
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### Past Ballots

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<tbody>
<tr>
<td>Philadelphia PES/AIS Joint Chapter</td>
<td>February 17, 2013 00:00 - March 03, 2013 23:59</td>
<td>Philadelphia Section Jt. Chapter, PE1/IA34</td>
<td>preview</td>
</tr>
<tr>
<td>PP</td>
<td>September 24, 2010 00:00 - September 24, 2010 23:59</td>
<td>Princeton/Central Jersey Section</td>
<td>preview</td>
</tr>
<tr>
<td>TEST election</td>
<td>August 08, 2010 00:00 - August 10, 2010 23:59</td>
<td>Princeton/Central Jersey Section</td>
<td>manage</td>
</tr>
<tr>
<td>R9 test ballot</td>
<td>March 26, 2010 00:00 - March 26, 2010 23:59</td>
<td>Princeton/Central Jersey Section</td>
<td>manage</td>
</tr>
<tr>
<td>TEST election for NJ Section GOFLD</td>
<td>March 23, 2010 00:00 - March 24, 2010 00:00</td>
<td>Princeton/Central Jersey Sec Aff Grp,GOFLD</td>
<td>manage</td>
</tr>
<tr>
<td>Section Election Test 1</td>
<td>July 30, 2009 00:00 - August 20, 2009 00:00</td>
<td>Princeton/Central Jersey Section</td>
<td>manage</td>
</tr>
</tbody>
</table>
View Election Results

IEEE Voting

<table>
<thead>
<tr>
<th>Home</th>
<th>Voting</th>
<th>Ballot Dashboard</th>
<th>About</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization:</td>
<td>Princeton/Central Jersey Section (R10329)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start/End dates:</td>
<td>July 30, 2009 00:00 - August 20, 2009 00:00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timezone:</td>
<td>Eastern Time (US &amp; Canada)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eligible voters:</td>
<td>There are 18 registered voters</td>
<td></td>
<td></td>
</tr>
<tr>
<td># of emails sent:</td>
<td>2 (out of 3 max)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last email sent on:</td>
<td>August 06, 2009 11:01</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Next email can be sent on:</td>
<td>You can send an email now.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Ballot results:

- View results
- Report results to IEEE headquarters
- Export results (CSV)
- Update results based on paper ballots
- Voter status report (shows who voted online and who did not)

Ballot statistics at a glance:

- Online voter turnout: 33%

Note: Election results will need to be reported using vTools Officer Reporting

Add results from paper ballots via “Update results based on paper ballots.”
The candidate who received the highest number of votes will be shown in red.