

INSTRUCTIONS FOR OBTAINING SOCIETY CHAPTER MEMBER COUNTS/LISTS FROM OU ANALYTICS DASHBOARD

1. Log into OU Analytics using your IEEE Username and Password
<http://www.ieee.org/ouanalytics>
2. From Landing Page, select Memberships, Subscriptions, and More

IEEE OU Analytics

The dashboard features six main sections:

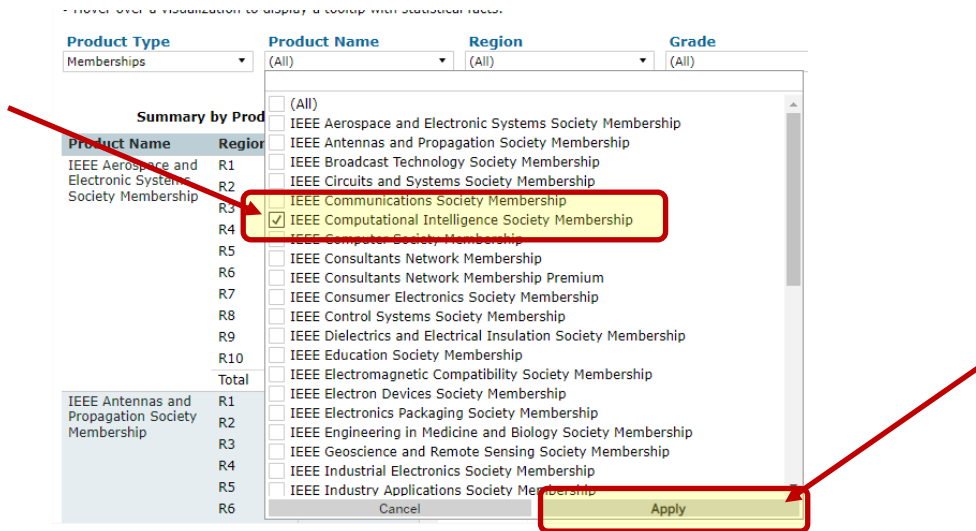
- Members and Affiliates:** Overview of geographic organizational unit members and participants.
- Students:** Overview of students by geographic organizational unit and educational institution.
- Volunteer Positions:** Current organizational unit volunteers including volunteer history.
- Memberships, Subscriptions, and More...:** Memberships, subscriptions, and participations by region, grade, gender, years of service, and renewal category. This section is highlighted with a red box and a red arrow.
- Doublet:** Overlapping memberships of organizational units.
- Map:** Geographic display of organizational units and counts.

3. You will be taken to the Product Dashboard, the Product Type will default to Memberships. Under Product Name, deselect “All” then select your society and click “Apply”.

The Product Dashboard includes the following elements:

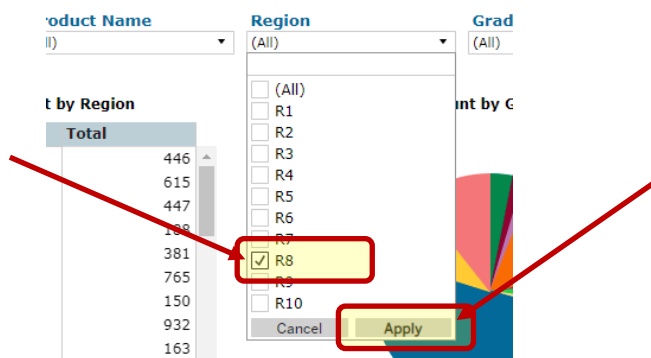
- Navigation tabs: Product Dashboard, Product Summary by Region b..., Renewal Category Dashboard, Renewal Summary by R...
- Section Header: **IEEE OU Analytics**
- Section Header: **Memberships, Subscriptions, and More - Product Dashboard**
- Introductory text: This dashboard provides interactive views for memberships, communities, councils, online libraries, and per...
 - Refine data through filters or click within a visualization to view results and details.
 - Hover over a visualization to display a tooltip with statistical facts.
- Filters: Product Type (Memberships), Product Name ((All)), Region ((All)), Grade ((All)).
- Summary by Product Name table:

Product Name	Region	Summary
IEEE Aerospace and Electronic Systems	R1	<input checked="" type="checkbox"/> IEEE Aerospace and Electronic Systems Society Membership
IEEE Aerospace and Electronic Systems	R2	<input checked="" type="checkbox"/> IEEE Antennas and Propagation Society Membership
		<input checked="" type="checkbox"/> IEEE Broadcast Technology Society Membership
		<input checked="" type="checkbox"/> IEEE Circuits and Systems Society Membership



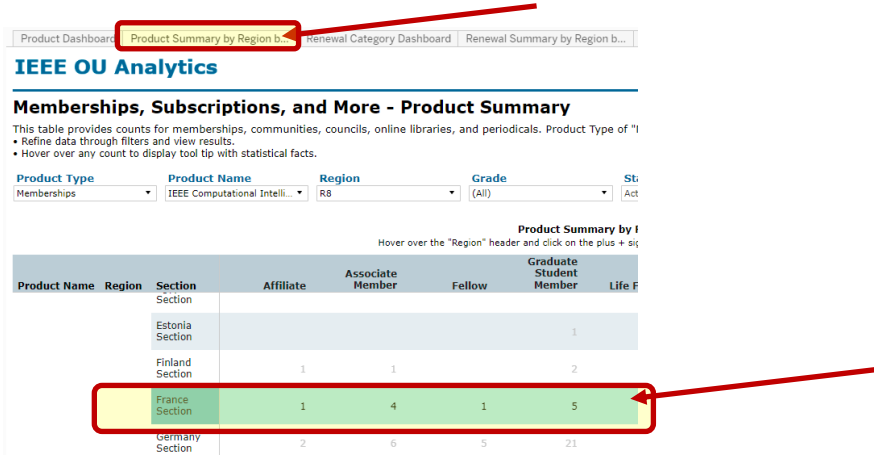
4. Click white space on page to close filter box.

5. Under Product Region, deselect "All" then select the specific Region and click "Apply".

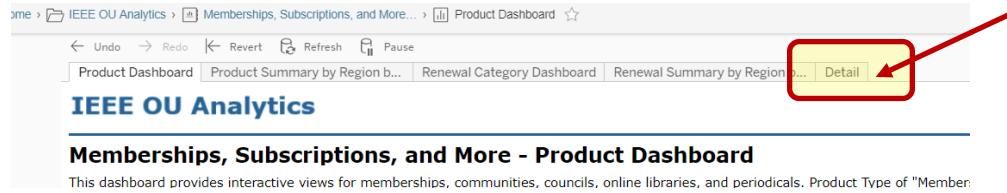


6. Click white space on page to close filter box.

7. To obtain the count of members for the Chapter, click on the second tab "Product Summary by Region b..." tab. Hover over "Region" and click on the "+" to expand to Sections. Scroll down to the Section where the chapter is.

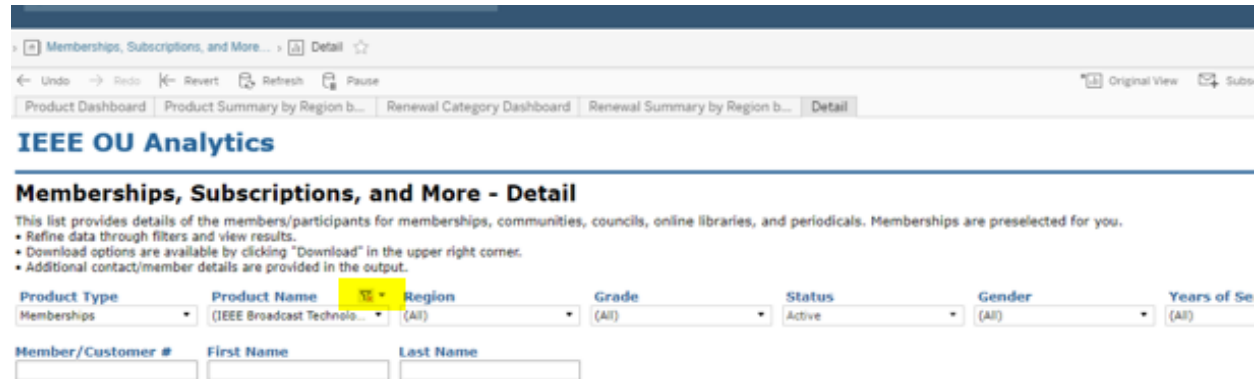


- To obtain the details for these members hover over the Section name for the tooltip to appear, click on “View Details”
- You will be brought to the “Details” tab showing those members in that specific Section.

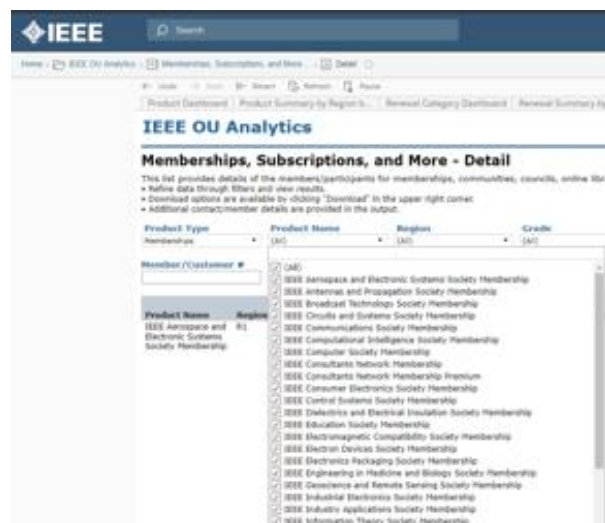


If you receive no results on the Details Tab, please use the following steps:

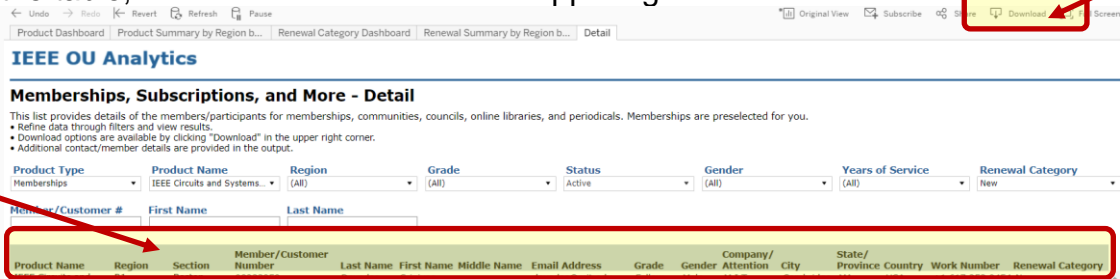
On the Detail tab, no info shows, click on the filter icon next to 'Product Name' to show all values.



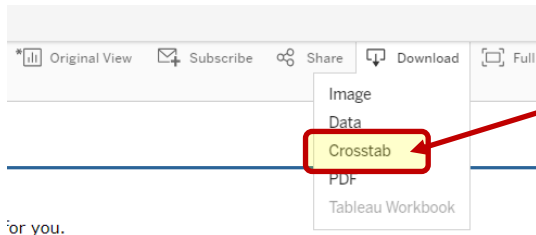
Then select the 'Product Name' from the drop down filter for the list of members to display.



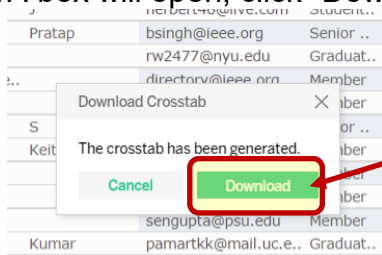
10. The screen view is limited to 16 columns; there is additional data available in the download including Society List, which provides all of the active societies the member belongs to. To download, click in grey, title bar, or somewhere within the table, then click on “Download” in upper right corner.



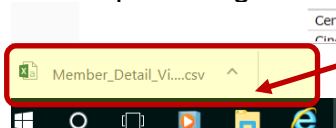
11. Click on “Crosstab”



12. A box will open, click “Download”



13. Your report will generate a csv file, you will need to “Open With” Excel



14. The report will populate all cells in Excel

15. To maintain GDPR compliance, please adhere to “Okay to Contact” filters – “N” means DO NOT CONTACT and must be removed from the target list.

Note: Chapter Chairs will only be able to obtain data on members for their chapter based on the Section. If a S/C Officer is obtaining the data on behalf of the Chapter, they will need to delete the data not applicable.