

INSTRUCTIONS FOR OBTAINING TECHNICAL COUNCIL 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

The screenshot shows the IEEE OU Analytics dashboard with the following sections:

- Members and Affiliates:** Overview of geographic organizational unit members and participants. (Icon: four stylized people)
- Students:** Overview of students by geographic organizational unit and educational institution. (Icon: two people at a table)
- Volunteer Positions:** Current organizational unit volunteers including volunteer history. (Icon: clipboard with magnifying glass)
- Memberships, Subscriptions, and More...:** Memberships, subscriptions, and participations by region, grade, gender, years of service, and renewal category. (Icon: IEEE logo with surrounding categories like Societies, Periodicals, Communities, Councils, Online Libraries, and Memberships)
- Doublet:** Overlapping memberships of organizational units. (Icon: two overlapping circles with people)
- Map:** Geographic display of organizational units and counts. (Icon: globe with location pins)

3. You will be taken to the Product Dashboard, Select the OU for your Volunteer Role. If you hold positions in multiple OU's, select the OU that you would like the data filtered for. After selecting, click the white space to close the filter.

The screenshot shows the Product Dashboard with the following elements:

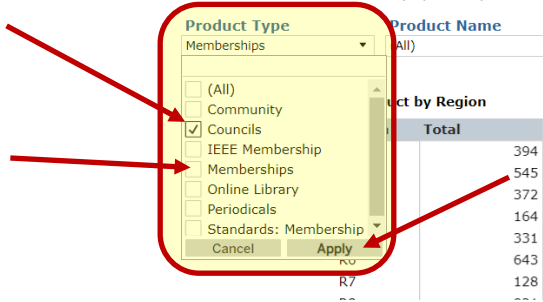
- Refine data through filters or click within a visualization to view
- Hover over a visualization to display a tooltip with statistical data
- **Important:** Choose an OU from "Select OU of your Volunteer Role"
- Select OU of your Volunteer Role** (dropdown menu with "(All)" selected)
- Product Type** (dropdown menu with "Memberships" selected)
- Summary by Product by Region** (table header)

- The Product Type will default to “Memberships”. Deselect “Memberships” and Select “Councils” and click “Apply”.

IEEE OU Analytics

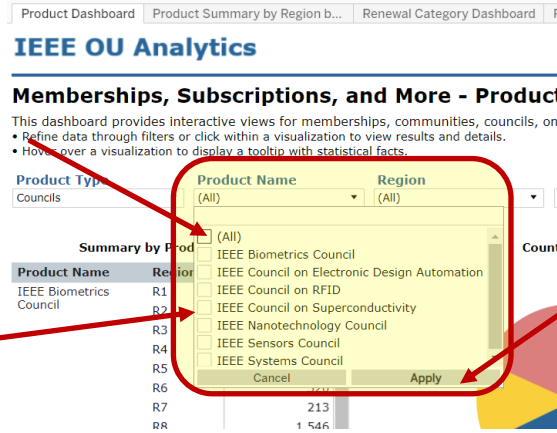
Memberships, Subscriptions,

This dashboard provides interactive views for mem
 • Refine data through filters or click within a visualizati
 • Hover over a visualization to display a tooltip with sta



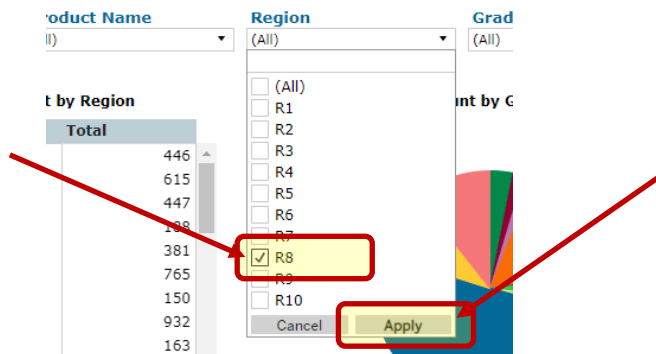
- Click white space on page to close filter box.

- Under Product Name, deselect “All” then select your council and click “Apply”.



- Click white space on page to close filter box.

- Under Region, deselect “All” then select the specific Region and click “Apply”.



- Click white space on page to close filter box.

10. To view the breakdown of active society members by grade and section click the second tab 'Product Summary by Region...' Hover over "Region" and click on the "+" to expand to Sections. The counts provided your Society's member count for that Joint Chapter.

Product Dashboard | **Product Summary by Region b...** | Renewal Category Dashboard | Renewal Summary by Region b... | Detail

IEEE OU Analytics

Memberships, Subscriptions, and More - Product Summary

This table provides counts for memberships, communities, councils, online libraries, and periodicals. Product Type of "Memberships" is preselected.

- Refine data through filters and view results.
- Hover over any count to display tool tip with statistical facts.

Product Type: Memberships | Product Name: IEEE Reliability Society M... | Region: (All) | Grade: (All) | Status: Active

Product Summary by Region by Grade
Hover over the "Region" header and click on the plus + sign to expand Region counts by Council and Section.

Product Name	Region	Section	Affiliate	Associate Member	Fellow	Graduate Student Member	Life Fellow	Life Member	Life Senior	Member	Senior Member	Student Member	Total	
IEEE Reliability Society Membership	(All)	Northampton Section						1		4	2		7	
		Boston Section		2		1		6	5	35	6		55	
		Connecticut Section			1						5			6
		Green Mountain Section						1			4	1		6
		Long Island Section						3	1	1	3	2		10
		Maine Section									3			3
		Mid-Hudson Section									2			2
		Mohawk Valley Section							1	1		3		5
		New Hampshire Section			1		1		2	2	3	3		12

11. To view the breakdown of active society members by Renewal Category (New, Reinstated, Renewed, First Year Renewed) click the tab 'Renewal Category Dashboard'. Hover over "Region" and click on the "+" to expand to Sections.

Product Dashboard | Product Summary by Region | **Renewal Category Dashboard** | Renewal Summary by Region b... | Detail

IEEE OU Analytics

Memberships, Subscriptions, and More - Renewal Dashboard

This renewal dashboard provides interactive views for memberships, communities, councils, online libraries, and periodicals. Memberships are preselected for you.

- 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.

Product Type: Memberships | Product Name: IEEE Reliability Society M... | Region: (All) | Grade: (All) | Renewal Category: (All) | Status: Active

Overview of Product Renewals

Legend: Renew (blue), First Year Renewed (yellow), New (green), Reinstated (orange), Not Yet Renewed (grey), Arrears (purple), Product Deletion (red), Resigned (dark red), Deceased (light blue), Pub Conversion (pink), Canceled (dark grey)

IEEE Reliability Society Membership: 100 200 300 400 500 600 700 800 900 1000 1100 1200 1300 1400 1500 1600

Product Summary by Region by Renewal Category
Hover over the "Region" header and click on the plus + sign to expand Region counts by Council and Section.

Product Name	Region	Renew	First Year Renewed	New	Reinstated	Not Yet Renewed	Product Deletion	Total
IEEE Reliability Society Membership	R1	18	1	3	1	121	1	145
	R2	14	1	4	1	106	1	127
	R3	5	2	4	1	97		109
	R4	6		2	1	96		105
	R5	7	1		1	111	3	123
	R6	22	1	6		240	4	273
	R7	4		2	1	39		46
	R8	11		2	1	237	3	254
	R9	2	1			26		29
	R10	13		18	2	350		383
	Total		102	7	41	9	1,423	12
Grand Total		102	7	41	9	1,423	12	1,594

12. To see the breakdown of members by Renewal Category and Section and Grade click on the tab 'Renewal Summary by Region b...' Hover over "Region" and click on the "+" to expand to Sections.

IEEE OU Analytics

Memberships, Subscriptions, and More - Renewal Summary

This table provides counts by renewal category for memberships, communities, councils, online libraries, and periodicals. Product Type of "Memberships" is preselected.

- Refine data through filters and view results.
- Hover over any count to display tool tip with statistical facts.

Product Type: Memberships | Product Name: IEEE Reliability Society M... | Region: (All) | Grade: (All) | Renewal Category: (All) | Status: Active

Renewal Summary by Region by Grade

Hover over the "Region" header and click on the plus sign to expand Region counts by Council and Section.

Product Name	Region	Section	Affiliate	Associate Member	Fellow	Graduate Student Member	Life Fellow	Life Member	Life Senior	Member	Senior Member	Student Member	Total	
IEEE Reliability Society Membership	R1	Brighamton Section								1	4	2	7	
		Boston Section		2		1		6	5	35	6		55	
		Connecticut Section		1							5		6	
		Green Mountain Section							1		4	1	6	
		Long Island Section						3	1	1	3	2	10	
		Maine Section									3		3	
		Mid-Hudson Section									2		2	
		Mohawk Valley Section							1	1			3	5
		New Hampshire Section	1			1			2	2	3	3		12
		New Jersey Coast Section										2		2
New York Section							1	1	1		1	4		

13. To obtain the details for these members click on the "Details" tab.

IEEE OU Analytics

Memberships, Subscriptions, and More - Product Dashboard

This dashboard provides interactive views for memberships, communities, councils, online libraries, and periodicals. Product Type of "Member

14. 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, Technical Community List, Technical Council List, etc. To download, click in grey, title bar, or somewhere within the table, then click on "Download" in upper right corner.

IEEE OU Analytics

Memberships, Subscriptions, and More - Detail

This list provides details of the members/participants for memberships, communities, councils, online libraries, and periodicals. Memberships are preselected for you.

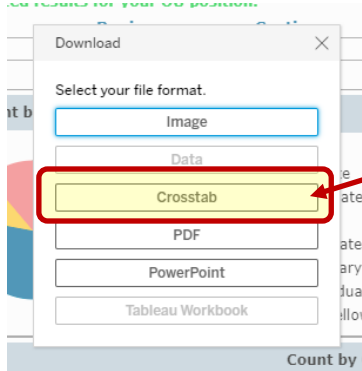
- Refine data through filters and view results.
- Download options are available by clicking "Download" in the upper right corner.
- Additional contact/member details are provided in the output.

Product Type: Memberships | Product Name: IEEE Circuits and Systems... | Region: (All) | Grade: (All) | Status: Active | Gender: (All) | Years of Service: (All) | Renewal Category: New

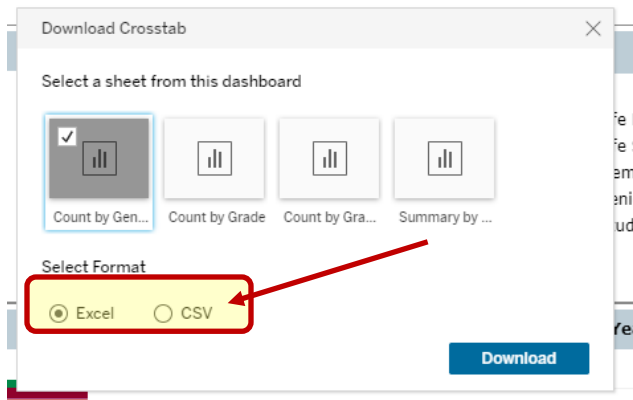
Member/Customer # | First Name | Last Name

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
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15. Click on “Crosstab”



16. A download box will open. The default is Excel. If you will be sorting the data, it is recommended to select “CSV” as the download file type



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