INSTRUCTIONS FOR OBTAINING PRODUCT DELETION AND ARREARS SOCIETY MEMBER COUNTS AND LISTS FROM OU ANALYTICS DASHBOARD

Product Deletion: Members who renewed their IEEE membership and cancelled (deleted) their Society membership during the current renewal year.

Arrears: Members, who have not renewed for the current renewal year, are placed into Arrears as part of the Service Deactivation process at month-end February.

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

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.
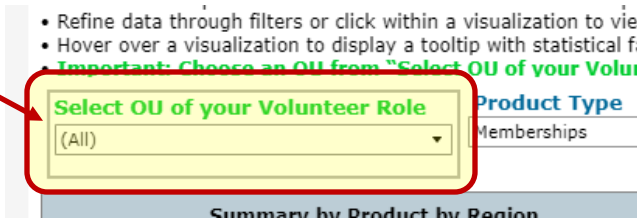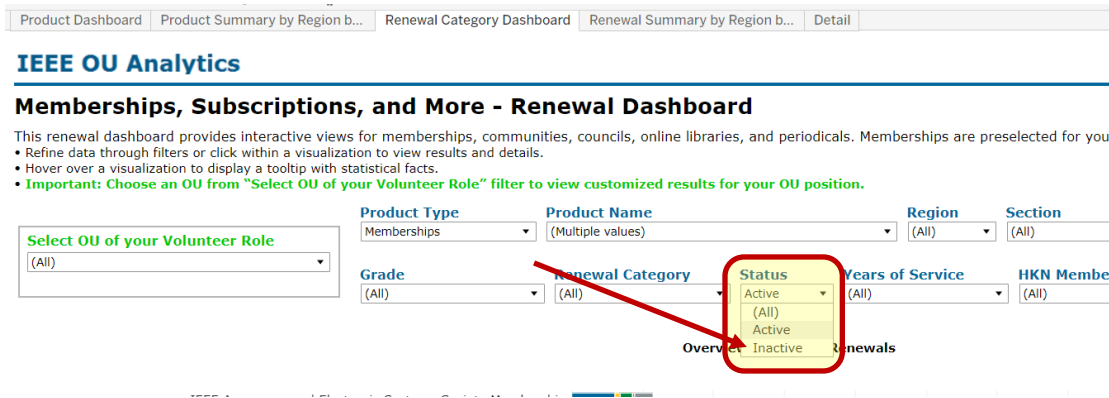

4. The Product Type will default to Memberships. Under Product Name, deselect "All" then select your society and click "Apply".

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

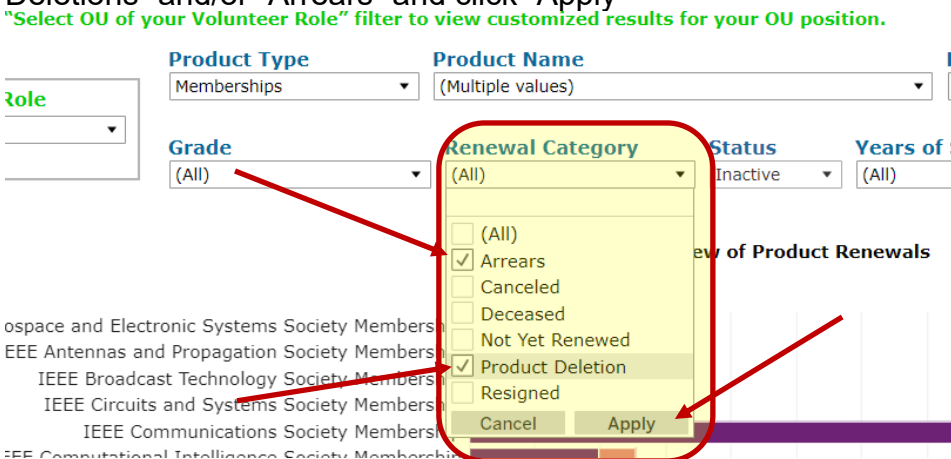6. Click on the "Renewal Catetgory Dashboard" tab.
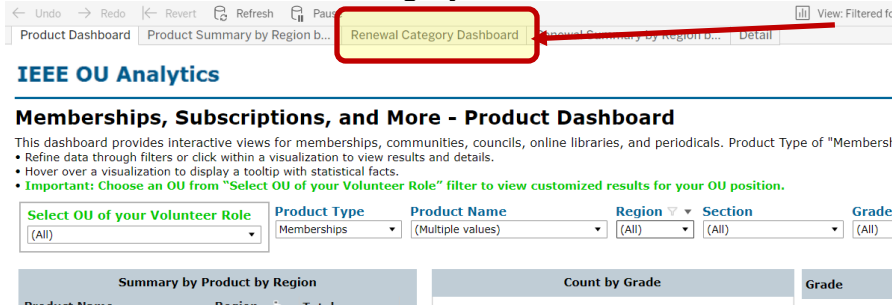
7. Click on the "Status" filter and select "Inactive"

8. The Bar Chart and Table will update to reflect the count of the Society's Inactive members by Renewal Category.

9. Click on the "Renewal Category" filter, deselect "All", then select "Product Deletions" and/or "Arrears" and click "Apply"

10. To save this view with the filters applied, click on "Original View" in the upper right.

11. A dialogue box will open. Type in the name you would like this view saved as, then click "Save". If you would like this view displayed when you open this tab, click on the box next to "Make it my default".

12. To obtain the list of these members, click on the "Details" tab
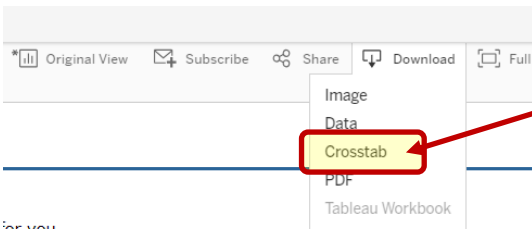

13. The filters that were applied on the Product Dashboard and Renewal Category Dashboard will carry over to all of the other tabs.

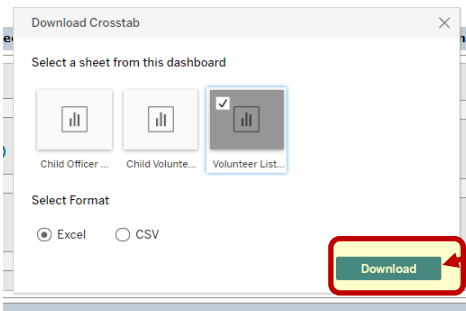14. Click white space on page to close filter box.

15. Click in grey, title bar, or somewhere within the table, then click on "Download" in upper right corner.
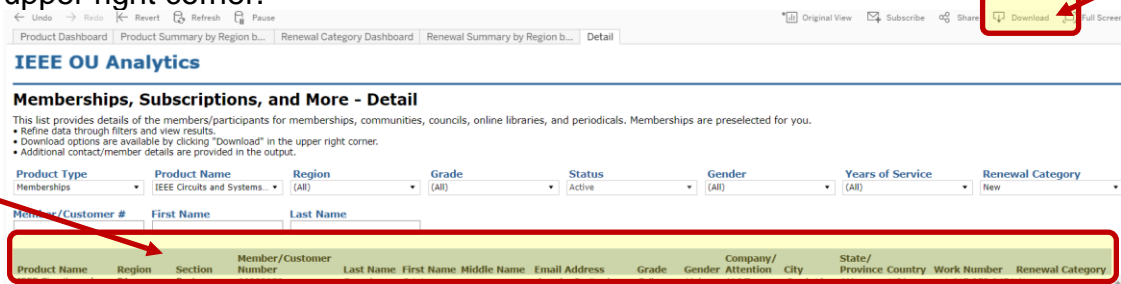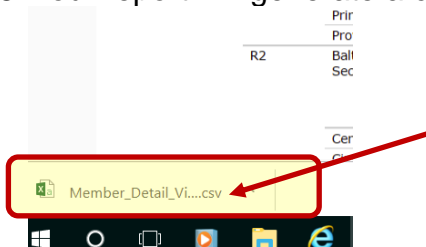

16. Click on "Crosstab"

17. A box will open, select either Excel or CSV. The Excel option will download the data with merged fields. It is recommended to use CSV if you will be sorting the data. Click "Download"
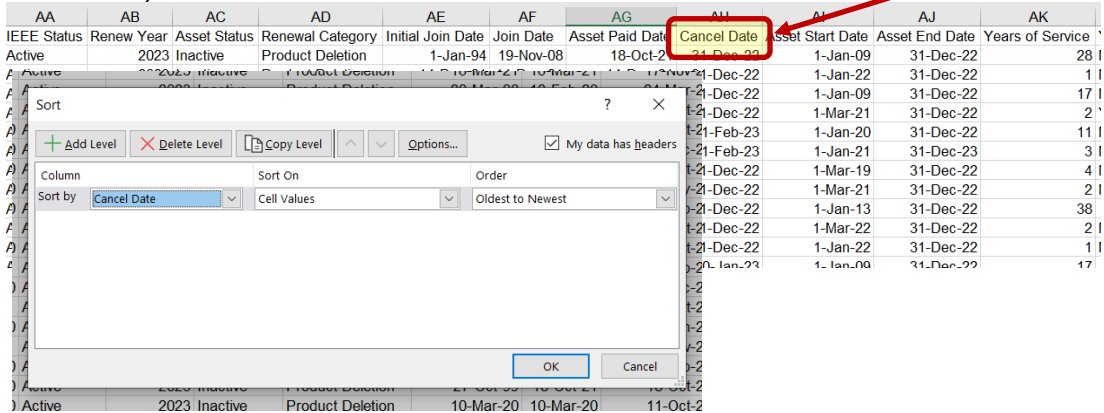

18. Your report will generate a csv file, you will need to "Open With" Excel

19. The report will populate all cells in Excel

20. From the ribbon on top, click Sort/Filter and Sort by "Cancel Date" (not "Asset End Date")

21. This list is all "Product Deletions" and/or "Arrears" for the current Renewal Year (i.e. 2023 Renewal Year).

22. Scroll over to the last column "OK to Contact". Everyone with "Yes" have provided authorization for contact.

Remove those with "No" because they have explicitly requested **NOT** to be contacted.