

# 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

## IEEE OU Analytics

### 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

### Doublet



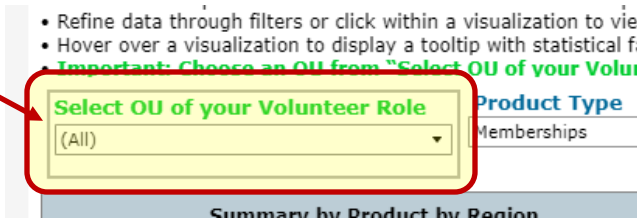
Overlapping memberships of organizational units

### Map

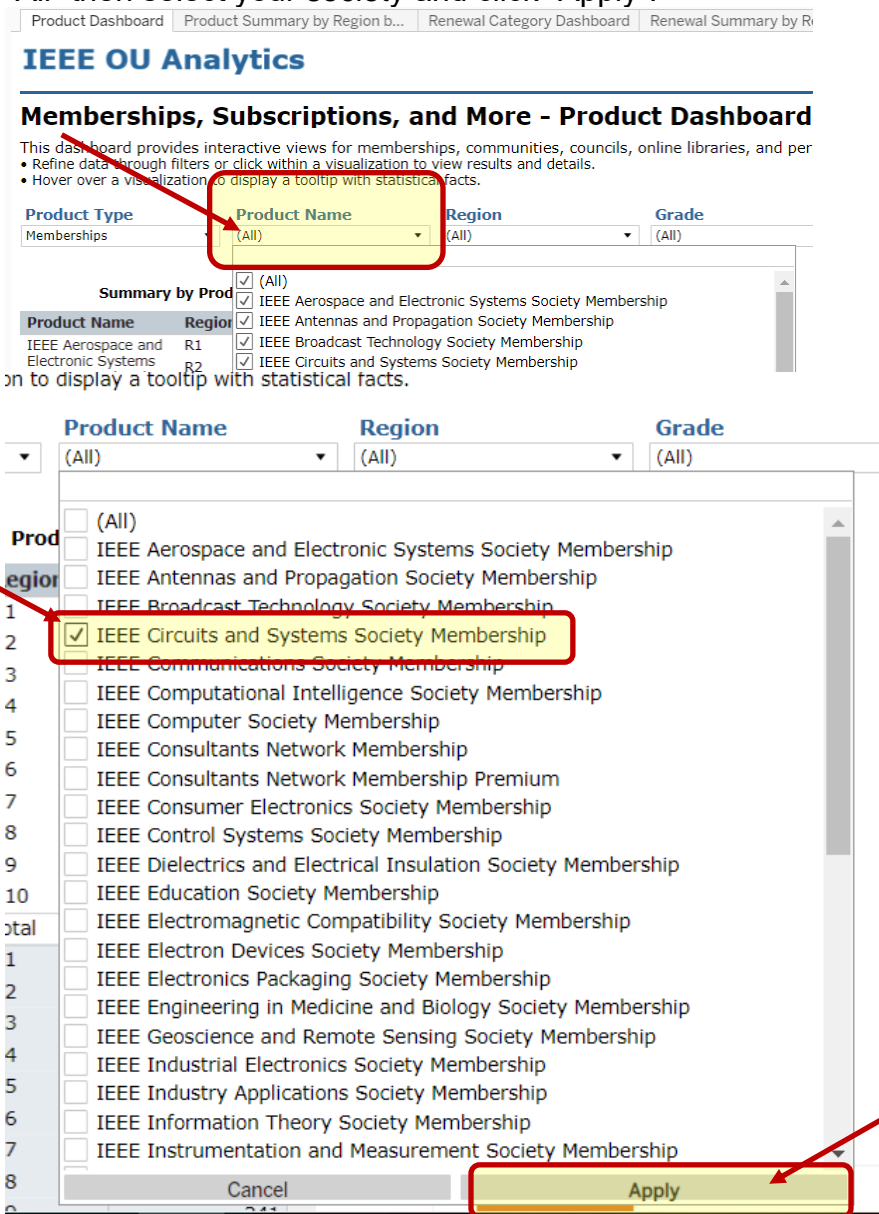


Geographic display of organizational units and counts

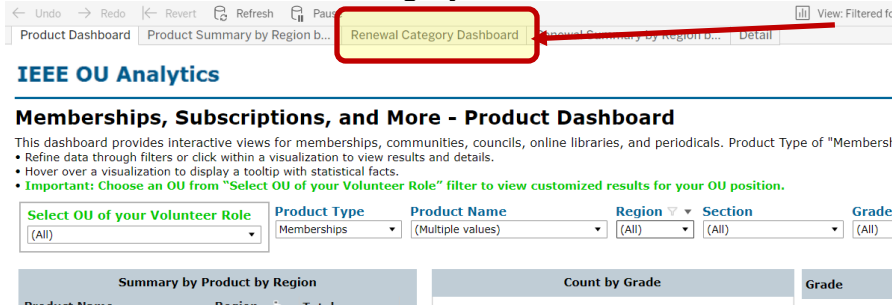
- You will be taken to the Product Dashboard, Select the OU for your Volunteer Role. If you hold positions in multiple OU's, select the OU that you would like the data filtered for. After selecting, click the white space to close the filter.



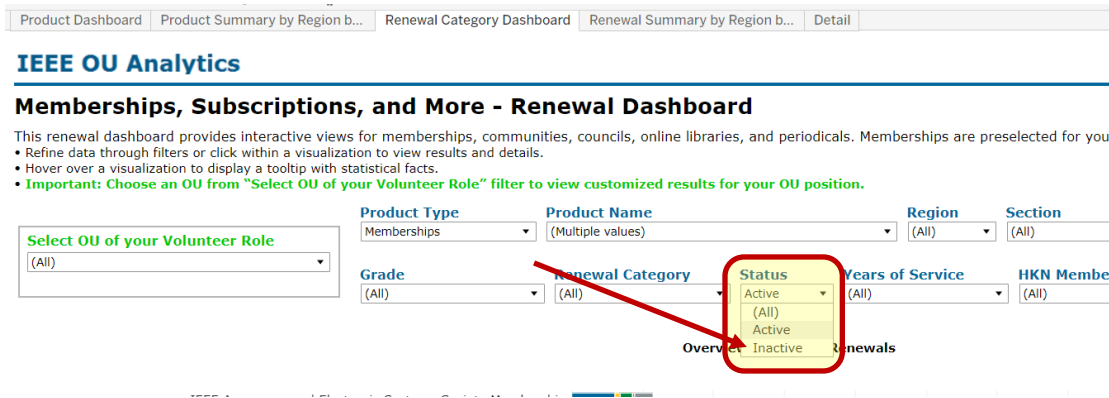
- The Product Type will default to Memberships. Under Product Name, deselect "All" then select your society and click "Apply".



- Click white space on page to close filter box.
- Click on the “Renewal Category Dashboard” tab.

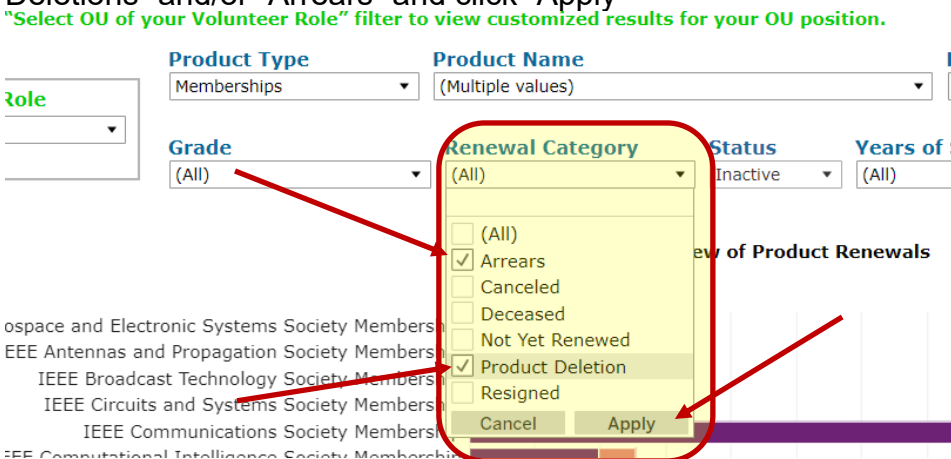


- Click on the “Status” filter and select “Inactive”



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

- 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.

The screenshot shows the IEEE OU Analytics dashboard. At the top right, there is a button labeled "Original View" with a small icon, which is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, there are two pie charts: "Volunteer Count by Gender" (Male 69.37%, Female 18.92%, Unknown 11.71%) and "Position Vacant or Filled" (Filled 87.38%, Vacant 12.62%). Below the charts is a table with columns: OU Type, OU Name, Position, Position Description, Last Name, First Name, Middle Name, Email Address, Grade, Gender, Position Start, Position End, Country, and Region. The table contains several rows of volunteer data.

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”.

The screenshot shows a dialog box for saving a view. It has a text input field containing "Test", a "Save" button, and two checkboxes: "Make it my default" and "Make it public". Red arrows point to the input field, the "Save" button, and the "Make it my default" checkbox. Below the dialog box, there is a section titled "My Views" which currently shows "Nothing saved yet". Below that is a section titled "Other Views" which lists several saved views: "Original View (default)" by Muralidhar Arjunan, "BTS Fellows" by Mary Curtis, "OKC New Members" by Robert Scollin, and "RAS View" by Amy Reeder.

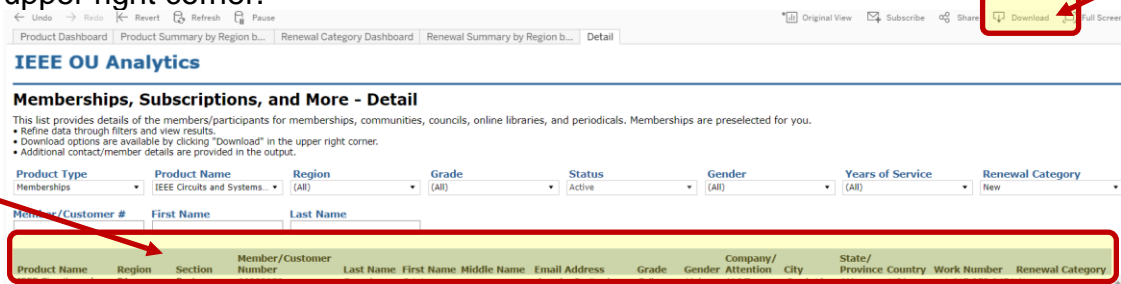
12. To obtain the list of these members, click on the “Details” tab

The screenshot shows the IEEE OU Analytics dashboard for "Memberships, Subscriptions, and More - Product Dashboard". At the top right, there is a tab labeled "Details" which is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, there is a section titled "Memberships, Subscriptions, and More - Product Dashboard" with a subtitle: "This dashboard provides interactive views for memberships, communities, councils, online libraries, and periodicals. Product Type of 'Member'".

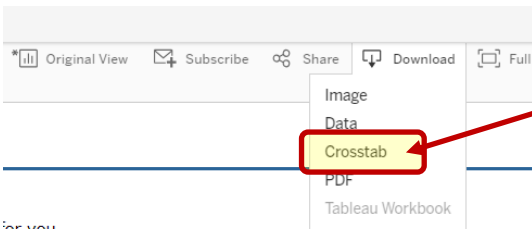
13. The filters that were applied on the Product Dashboard and Renewal Category Dashboard will carry over to all of the other tabs.

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

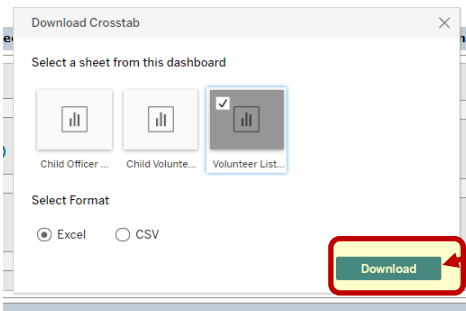
15. Click in grey, title bar, or somewhere within the table, then click on “Download” in upper right corner.



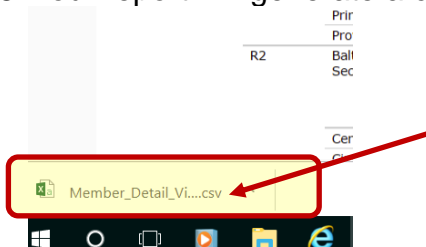
16. Click on “Crosstab”



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”



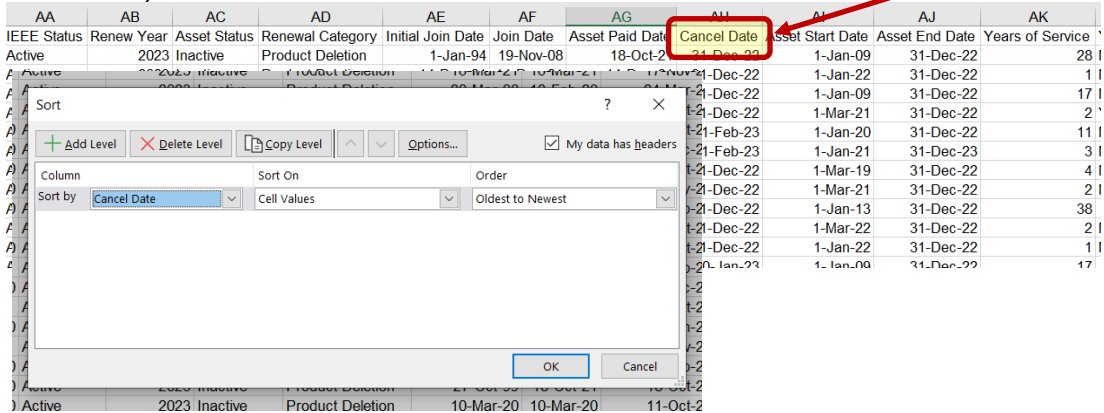
18. Your report will generate a csv file, you will need to “Open With” Excel



19. The report will populate all cells in Excel

Product	Product Name	Product Category	Region	Section	Subsecto	Member/C	Last Name	First Name	Middle	Nar	Email	Ass	Grade	Gender	Company/	Address 1	Address 2	Address 3	City
Members	IEEE Circ	MEMCAS1	R1	Boston	Section	8233959	Devedas	Srinivas			devedas@	Fellow	Male	MIT	32 Vassar St	32G-844			Cam
Members	IEEE Circ	MEMCAS1	R1	Boston	Section	94478168	Oliva	Alexander			a.oliva@	Member	Unknown		350 3rd St	Unit 1909			Cam
Members	IEEE Circ	MEMCAS1	R1	Boston	Section	95190235	Tunney	Anthony	E		anthony.tu	Member	Male		5 Bunker Ave				Rosl
Members	IEEE Circ	MEMCAS1	R1	Buffalo	Section	95146163	T Chandra	Sangeev			stansirk@	Graduate	Male		1525 Amherst Manor Dr	Apt 511			Buff
Members	IEEE Circ	MEMCAS1	R1	Maine	Section	95174408	Herbert	Alexander	J		herbert@	Student	Male		69 5th St				Old T
Members	IEEE Circ	MEMCAS1	R1	New Hampshire	Section	94950094	Singh	Bhama	Pratap		bongh@	Senior	Male	Meloxic	8 Fond Pond Dr				Bedf
Members	IEEE Circ	MEMCAS1	R1	New York	Section	95128894	Wiang	Rui			rw477@	Graduate	Male		1361 67th				Broo
Members	IEEE Circ	MEMCAS1	R1	Princeton/Central	Jer	93064084	R Director	Ch	MemberNet		directory@	Member	Unknown		445 Hoes Ln				Pisc
Members	IEEE Circ	MEMCAS1	R1	Providence	Section	95158185	Maher	Tom			tmaher@	Member	Male	Sensata	T529 Peasa	MS B-39			Attle
Members	IEEE Circ	MEMCAS1	R2	Baltimore	Section	80261355	Lee	Jeremy	S		jeremy.s	Senior	Male		5416 Meadowpond Dr				Ellic
Members	IEEE Circ	MEMCAS1	R2	Baltimore	Section	95086162	Burchfield	Zachary	Keith		zachary.b	Member	Male	JHU/APL	11100 Johns Hopkins Rd				Laun
Members	IEEE Circ	MEMCAS1	R2	Baltimore	Section	95189065	pujatha	edward			epujatha@	Member	Male	JHU	Apple 11100 John	Mail Stop 200-W321			Laun
Members	IEEE Circ	MEMCAS1	R2	Baltimore	Section	95189052	Karanakar	Kanu			vignakar@	Member	Male		Johns Hop	4915 Silver Sage Dr			Ellic
Members	IEEE Circ	MEMCAS1	R2	Portland/Andover	Section	95578678	Convents	Abhinav			abhinav@	Member	Male		Down State	900M P	Rollins Ave	Ap 21	Chate

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.

AE	AF	AG	AH	AI	AJ	AK	AL	AM
Asset Start Date	Asset End Date	Years of Service	HKN Code	HKN Name	HKN Induc	OK for	OK to contact	
1-Jan-19	31-Dec-19	1				Yes	Yes	
1-Jan-19	31-Dec-19	1				Yes	Yes	
1-Jan-19	31-Dec-19	1				Yes	Yes	
1-Jan-19	31-Dec-19	1				Yes	Yes	
1-Jan-19	31-Dec-19	1				Yes	Yes	
1-Jan-19	31-Dec-19	1				Yes	Yes	

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

1		Yes	Yes	
1		Yes	Yes	
1		Yes	Yes	
1		Yes	Yes	
1		Yes	Yes	
1		Yes	No	
1		Yes	Yes	
1		Yes	Yes	