PRESENTS

Introduction to vTools.Officer Reporting
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Create an Officer Report

In order to make a new report, first select an organizational unit. You can either type in a name of the unit or its SPO ID (aka geocode). When you start typing a name, the system will use auto assist technology to come up with a list of possible organizational units, based on the text you type. Select a name in the drop down menu shown and click on the “Select Unit” button to retrieve and display current officer data for the selected organizational unit.

Navigate to [https://officers.vtools.ieee.org/](https://officers.vtools.ieee.org/)
Create an Officer Report – cont’d.

Instructions: To view current officers and report changes to the officer roster type in a name of the unit or its SPC ID (aka geocode) in the text box below. (show more)

Notice how starting to type “Princeton” results in dynamically changing drop down list with possible organizational unit names. Please allow time for the system to process your input and come up with a list of possible values.

Note: Take care not to click off the box until you have selected an organizational unit.

Once you get a short list of units that match the word you typed, you can scroll down the list and click on the one you are submitting a report for. Please take care not to take focus off the drop down (Do no click anywhere else on the screen).
Create an Officer Report – cont’d.

Let’s select Princeton/Central Jersey Section by clicking on its name.
Create an Officer Report – cont’d.

Welcome to vTools.OfficerReporting, Noam Hassid! (logout)

Instructions: To view current officers and report changes to the officer roster type in a name of the unit or its SPO ID (aka geocode) in the text box below. (show more)

R10329 - Princeton/Central Jersey Section

Select Unit

Please enter unit's name or code on the left to select your unit.

After you select an organizational unit in the drop down, it’ll be shown in the text box above and the drop down will disappear. Now click on the “Select Unit” button to retrieve and show data for the Princeton/ Central Jersey Section.
Create an Officer Report – cont’d.

Note the message that the organizational unit was successfully selected.

Note the name of the organizational unit you selected.

You can select a different unit by following the previously outlined steps.
Create an Officer Report – cont’d.

Use the inside scroll bar to view additional officers

Active elected volunteers in the selected organizational unit are shown here. Note that vacant positions have a blank corresponding officer name.
Create an Officer Report – cont’d.

If the position you are reporting is not in the list, fill out a request form which can be accessed by clicking this link.

<table>
<thead>
<tr>
<th>Position</th>
<th>Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Activities</td>
<td>N. Iwan Santoso, Hemant Vora</td>
</tr>
<tr>
<td>SAMIEEE RECIPIENT</td>
<td>Wieslaw Bury</td>
</tr>
<tr>
<td>SAMIEEE User - Full Access</td>
<td>IEEE Testing</td>
</tr>
<tr>
<td>Secretary</td>
<td>Francis Oconnell</td>
</tr>
<tr>
<td>Student Activities</td>
<td></td>
</tr>
<tr>
<td>Treasurer</td>
<td>David Soll</td>
</tr>
</tbody>
</table>
Create an Officer Report – cont’d.

In order to make changes to a position, click on the corresponding radio button.

Once a position is selected, the system will show details about officer(s) holding that position.
Create an Officer Report – cont’d.

Welcome to vTools.OfficerReporting, Noam Hassid! (logout)

Instructions: To view current officers and report changes to the officer roster type in a name of the unit or its SPO ID (aka geocode) in the text box below. (show more)

You can also end term of an individual officer in the selected position.

You can add a new officer to a selected position or end term for all of the officers in that position.
When adding a new officer, you will be asked to provide officer’s IEEE member number and the term start date. Note that all of the IEEE member numbers are 8 digits long (some start with 0). Once you click on the “Validate & Submit,” the system will retrieve member data and validate that (s)he is eligible to serve in that position based on IEEE rules.

If you have questions regarding eligibility errors, click on the “contact IEEE staff” hyperlink.
When vacating a position, you will be asked to provide a term date end for all the officers in the selected position.
When ending a term for an individual officer, make sure to select a corresponding radio button first, then click on the “End Term” button above.
Create an Officer Report – cont’d.

Now let’s end the term for an officer.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testing</td>
<td>IEEE</td>
<td>01/01/2008</td>
<td></td>
</tr>
</tbody>
</table>
Create an Officer Report – cont’d.

Click in the box to show a pop-up calendar

Select a date.
Create an Officer Report – cont’d.

Next, click “Submit” button.
Create an Officer Report – cont’d.

Note how the row corresponding to the officer is now highlighted and a new end date is shown.
Create an Officer Report – cont’d.

When done making changes, click on the “Confirm Change” button. Note that you can make multiple changes before clicking on the “Confirm Change” button.
Create an Officer Report – cont’d.

Welcome to vTools.OfficerReporting, Noam Hassid! (logout)  help

Please review the changes below and submit them when ready. Since you are not authorized to make the changes for this unit, they will be forwarded to the appropriate staff member.

Changes for UNIT: Princeton/Central Jersey Section

POSITION: SAMIEEE User - Full Access

First Name: IEEE
Last Name: Testing
Member Number: 90247965
Term Start Date: 01/01/2008
Term End Date: 03/21/2014

Submit Changes  Undo All Changes

List of changes you made will be shown. Available actions include submitting changes, undoing all of the changes, or going back to the organizational unit to make more changes.

A confirmation message is shown upon submission of the officer report.

If you are an officer of the organizational unit in which this report is for, your changes will be made immediately, Otherwise changes will be reviewed by staff before taking effect.
View Logs

Welcome to vTools.OfficerReporting, Noam Hassid! (logout)

Instructions: Note that by default, the system shows reports submitted by you. You can also search for reports submitted for any organizational units by others. (show more)

Filtering for User: n.hassid@IEEE.ORG

Submission Info

2013-06-12 20:32:55
Princeton/Central Jersey Section
Submitted By: Noam Hassid
Reviewed By: error

Report Details

No Changes

Clicking on the “View Logs” tab will allow you to search all of the logged officer reports. By default, the system shows the changes made by you.
Welcome to vTools.OfficerReporting, Noam Hassid! (logout)

Instructions: Note that by default, the system shows reports submitted by you. You can also search for reports submitted for any organizational units by others. (show more)

Filtering for User: n.hassid@IEEE.ORG

<table>
<thead>
<tr>
<th>Submission Info</th>
<th>Report Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013-06-12 20:32:55 Princetor/Central Jersey Section Submitted By: Noam Hassid Reviewed By: error</td>
<td>No Changes</td>
</tr>
</tbody>
</table>

Just as when typing a name, the system will use provided SPO ID to suggest possible organizational units based on what you type.

Click on “Show Log or selected Unit”
**Instructions:** Note that by default, the system shows reports submitted by you. You can also search for reports submitted for any organizational units by others. (show more)

Filtering for Unit: R30711

<table>
<thead>
<tr>
<th>Submission Info</th>
<th>Report Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013-03-20 20:38:57 Chattanooga Section Submitted By: <a href="mailto:rpbarnett@ieee.org">rpbarnett@ieee.org</a> Reviewed By: <a href="mailto:rpbarnett@ieee.org">rpbarnett@ieee.org</a> approved</td>
<td><strong>Position</strong></td>
</tr>
<tr>
<td></td>
<td>SAMIEEE RECIPIENT</td>
</tr>
<tr>
<td>2011-09-29 17:35:23 Chattanooga Section Submitted By: p.kovacs Reviewed By: p.kovacs approved</td>
<td><strong>Position</strong></td>
</tr>
<tr>
<td></td>
<td>Chair</td>
</tr>
<tr>
<td></td>
<td>Chair</td>
</tr>
<tr>
<td></td>
<td>Treasurer</td>
</tr>
<tr>
<td></td>
<td>Treasurer</td>
</tr>
<tr>
<td></td>
<td>Secretary</td>
</tr>
<tr>
<td></td>
<td>Secretary</td>
</tr>
</tbody>
</table>

A detailed log report will be shown with changes made highlighted.
You can contact staff by clicking on the “Contact staff” tab.
IEEE vTools are a series of web applications (toolbox) designed to assist volunteers in managing their OU activities as well as assisting them in managing member development and engagement. The toolbox goals are to simplify administration, reduce the time spent managing activities, and to provide assistance in member development. The vTools portfolio contains tools in various phases of development, from production, to pilot, to active development.

Visit vTools portal for more information: [http://vtools.ieee.org](http://vtools.ieee.org)

Click on the “About” tab to view information about vTools.

You can learn about many other IEEE tools in the vTools portfolio by navigating to [http://vtools.ieee.org](http://vtools.ieee.org)
Logging out

Once you're done using the system, please logout by clicking on the “logout” link.

Visit vTools portal for more information: http://vtools.ieee.org
Thank you for viewing the tutorial. Please remember to visit the vTools site (http://vtools.ieee.org) to learn more about our projects.

Thank you!