

IEEE Region 3 Senior Membership Coordinator Create Section Analysis Tool

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IEEE Region 3 Senior Membership Coordinator

April 2023

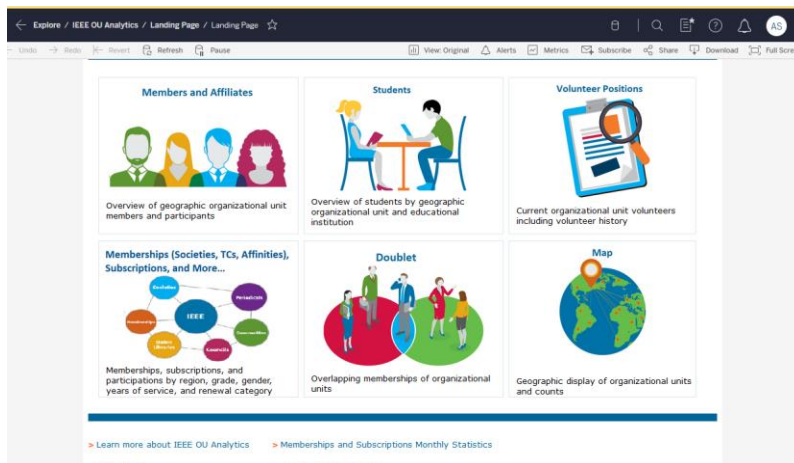
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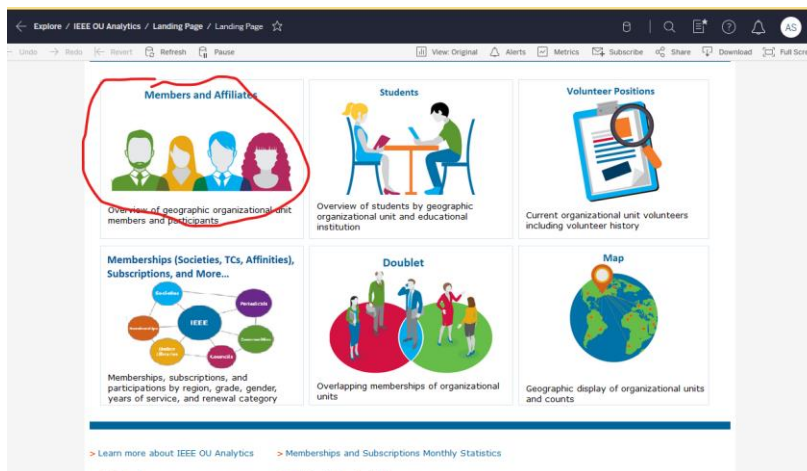
Step by Step: Build the Section Analysis Tool

The Section Analysis Tool is an Excel spreadsheet that provides summary statistics and detailed contact lists for officers and section members in Region 3. This guide details how to build this tool from OU Analytics data.

Log into OU Analytics. <https://mga.ieee.org/resources-operations/volunteer-tools/samiee>



Select Members and Affiliates.



Select the Region 3 OU.

The screenshot shows the IEEE OU Analytics dashboard. The 'Select OU of your Volunteer Role' dropdown is highlighted with a red circle and contains the following options: (All), Florida West Coast Section, Florida West Coast Section Jt. Chapter, AES10/C16, Southeastern USA - Region 3, and Act. Council - Section. The 'Region' dropdown is set to (All). The 'Grade' dropdown is set to (All). The 'IEEE Status' dropdown is set to Active. The 'HKN Member' dropdown is set to (All). The table below shows member counts by region and grade.

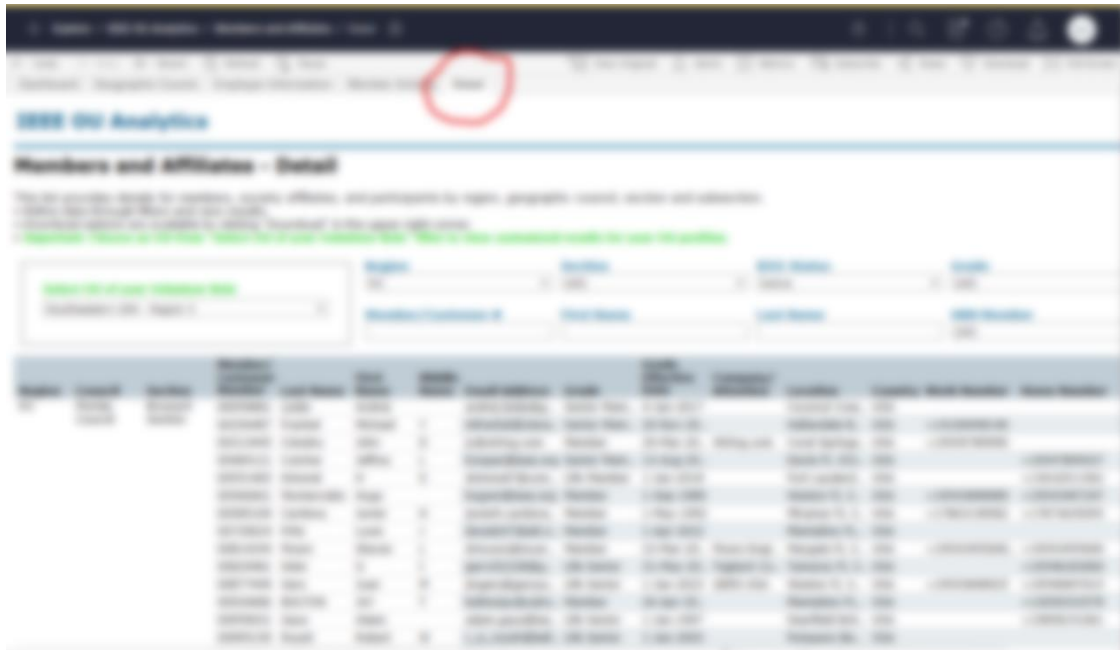
Region	Council	Section	Grade	Total
R1	Metro Sec. Connecticut Act. Council	IEEE Section	Student Member	5
			Member	4
			Total	9
Long Island Section	IEEE	Section	Member	1
			Total	1
			Total	1
New Jersey Coast Section	IEEE	Unspecified	Student Member	1
			Total	1
			Total	1
New York Section	IEEE Grades	Section	Graduate Student Member	5
			Member	1
			Student Member	3

Select Region 3 from the Region menu. There are inconsistencies in the underlying data where non-Region 3 members are still in the Region 3 OU.

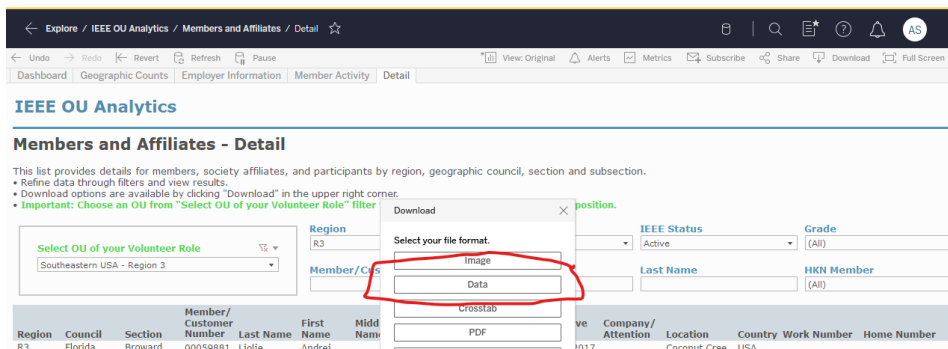
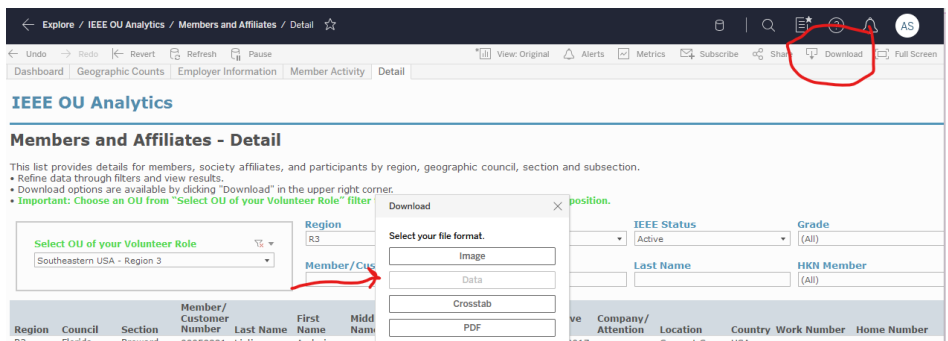
The screenshot shows the IEEE OU Analytics dashboard. The 'Select OU of your Volunteer Role' dropdown is highlighted with a red circle and contains the following options: (All), R1, R2, R3, R4, R5, R6, R7, R8, R9, R10, Unspecified, and Cancel. The 'Region' dropdown is set to (All). The 'Grade' dropdown is set to (All). The 'IEEE Status' dropdown is set to Active. The 'HKN Member' dropdown is set to (All). The table below shows member counts by region and grade.

Region	Council	Section	Grade	Total
R1	Metro Sec. Connecticut Act. Council	IEEE Section	Student Member	5
			Member	4
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			Total	1
			Total	1
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			Member	1
			Student Member	3

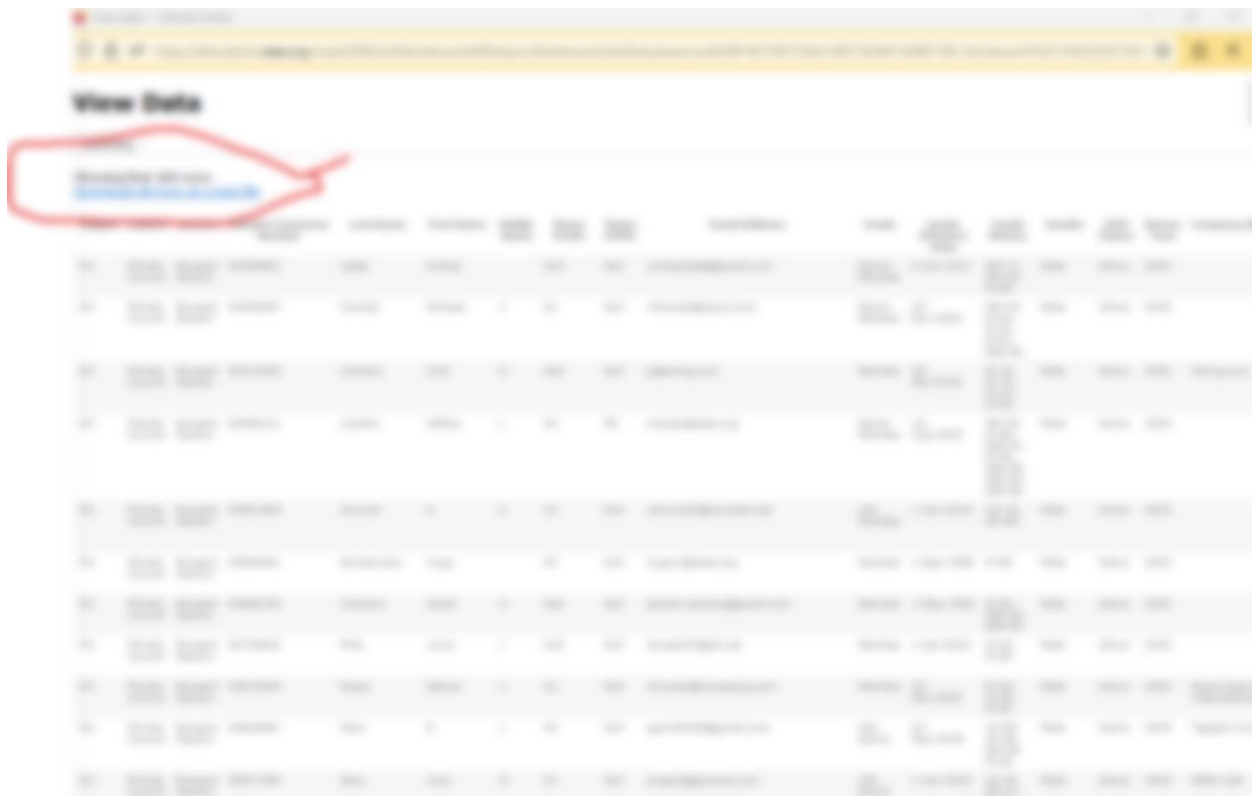
Select the Detail tab along the top.



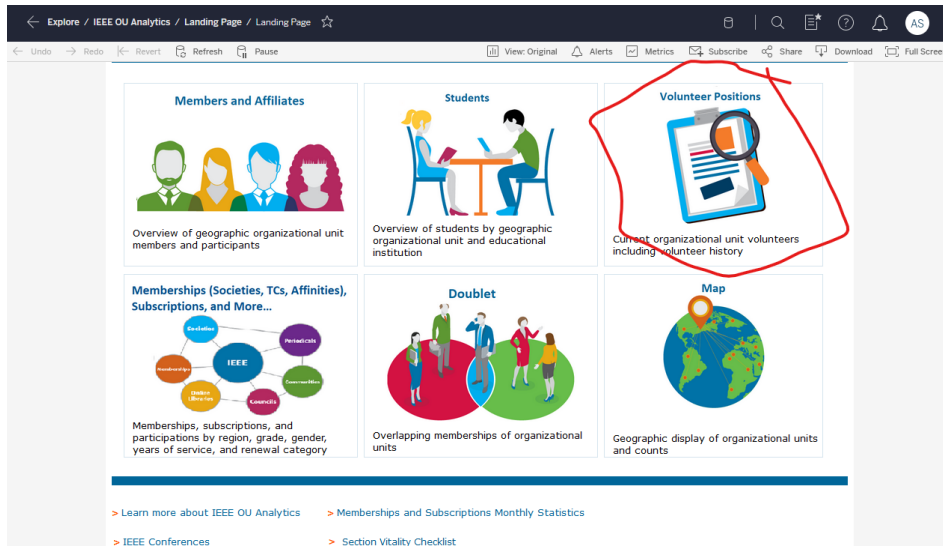
In the next pop-up, if the “data” option is greyed out, cancel with the “X” in the upper right of the pop-up and double-click a record that is on the screen. Then go back to download. For mysterious and unknown reasons, this seems to fix it.



Click the “download all rows as a text file” link. This will download a comma-separated values CSV file.



Go back to OU Analytics landing page and select “Volunteer Positions.”



Select Section and Sub-Section from the OU Type.

Explore / IEEE OU Analytics / Volunteer Positions & History / Volunteer Positions

Volunteer Positions

This dashboard provides interactive views for volunteers of IEEE organizational units.

- 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.
- Download options are available by clicking "Download" in the upper right corner.
- Additional contact/member details are provided in the output.

Select Organizational Unit Type, Organizational Unit Name, Volunteer Position, Region or Section below to refine your volunteer list. Enter Last Name/First Name/Customer# to search.

Volunteer Count by Gender

Organizational Unit (OU) Type

- (All)
- Affinity
- Board
- Chapter
- Committee
- Community
- Council
- Division
- IEEE
- IEEE Department
- Joint Chapter
- Local Group
- Region
- Section
- Section Student Branch
- Society
- Student Branch
- Student Branch Chapter
- Sub-section

Cancel Apply

Last Name

First Name

Member/Customer #

Region

Section

Position Vacant or Filled

OU Type	OU Name	Pos	First Name	Middle Name	Email Address	Grade	Gender	Position Start	Position End	Count
Affinity	A P Shah Institute of ..	Adv	Sukhada	Shasha..	ssaloni@apsit.edu.in	Member		12-Feb-2020		India
Affinity	A.P. Shah Institute of ..	Affin	Khushali	Kiran	khushalidesal2271@g...	Student Mem..	Female	2-Jan-2023	1-Jan-2024	India
Affinity	A.P. Shah Institute of ..	Sec	RUSHTI	KIRITB..	prushifuletra@gmail.c...	Student Mem..	Female	2-Jan-2023	1-Jan-2024	India
Affinity	A.P. Shah Institute of ..	Tre	Palak	Saurabh	palakshrofi16@gmail.c...	Student Mem..	Female	2-Jan-2023	1-Jan-2024	India

Select R3 in Region. Then download as done in the previous section.

← Explore / IEEE OU Analytics / Volunteer Positions & History / Volunteer Positions ☆

Undo Redo Revert Refresh Pause View: Original Alerts Metrics Subscribe Share Download Full Screen

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Volunteer Count by Gender

Unknown 5.38% Female 17.33% Male 77.13%

Organizational Unit (OU) Type
(Multiple values)

Organizational Unit (OU) Name
(All)

Position
(All)

Last Name

First Name

Member/Customer #

Region
(All) R1 R2 R3 R4 R5 R6 R7 R8 R9 R10 Vacant

Position Vacant or Filled
Filled 69.20%

OU Type	OU Name	Position	Position Description	Last Name	First Name	Middle Name	Email Address	Position Start	Position End	Country
Section	Aguascalientes Section	Chair		Castro	Mylena	Lopez	mylennalopezca	Apr-2021	30-Apr-2021	Mexico
Section	Aguascalientes Section	Membershi..								
Section	Aguascalientes Section	Newsletter..								
Section	Aguascalientes Section	Represent..	SIGHT							
Section	Aguascalientes Section	SAMIEEEE ..								
Section	Aguascalientes Section	Secretary								
Section	Aguascalientes Section	Student A..								
Section	Aguascalientes Section	Treasurer								

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Volunteer Positions

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Organizational Unit (OU) Type
(Multiple values)

Organizational Unit (OU) Name
(All)

Position
(All)

Region
R3

Section
(All)

Position Vacant or Filled
Filled 69.20%

Download

Select your file format.

Image

Data

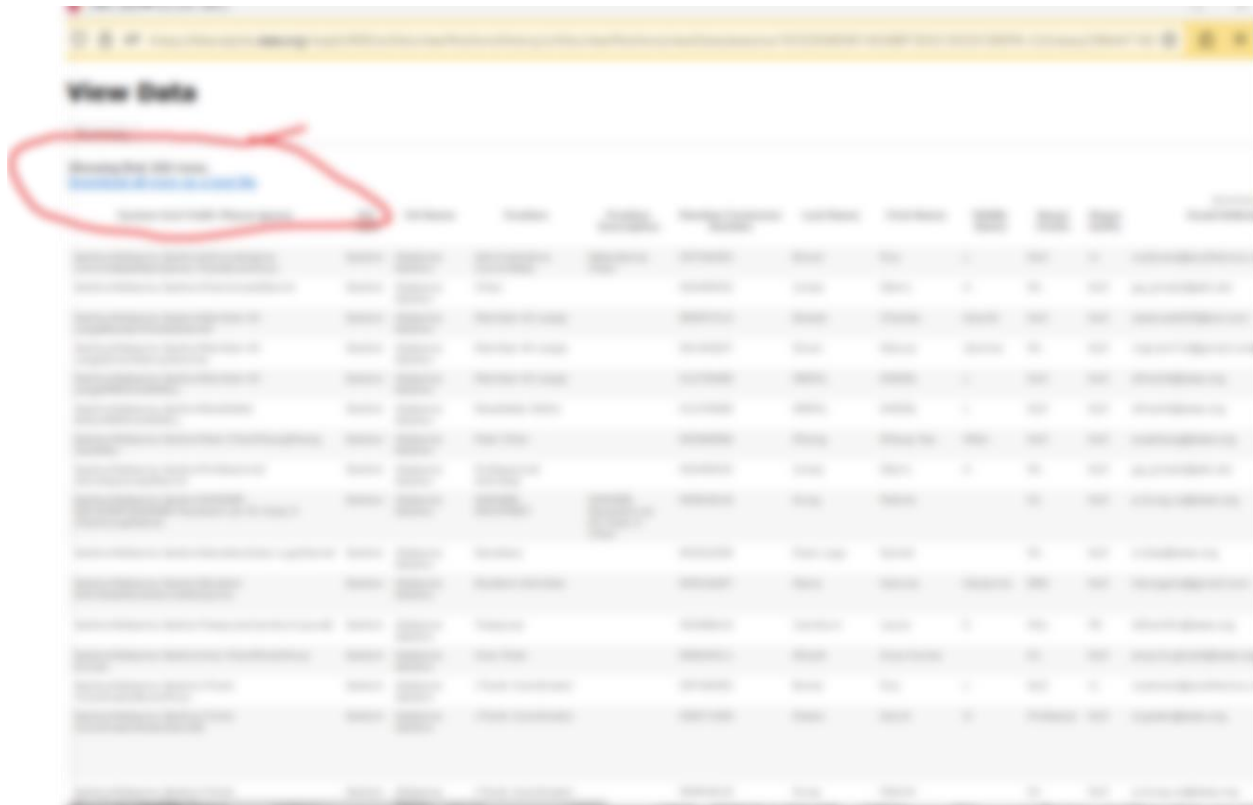
Crosstab

PDF

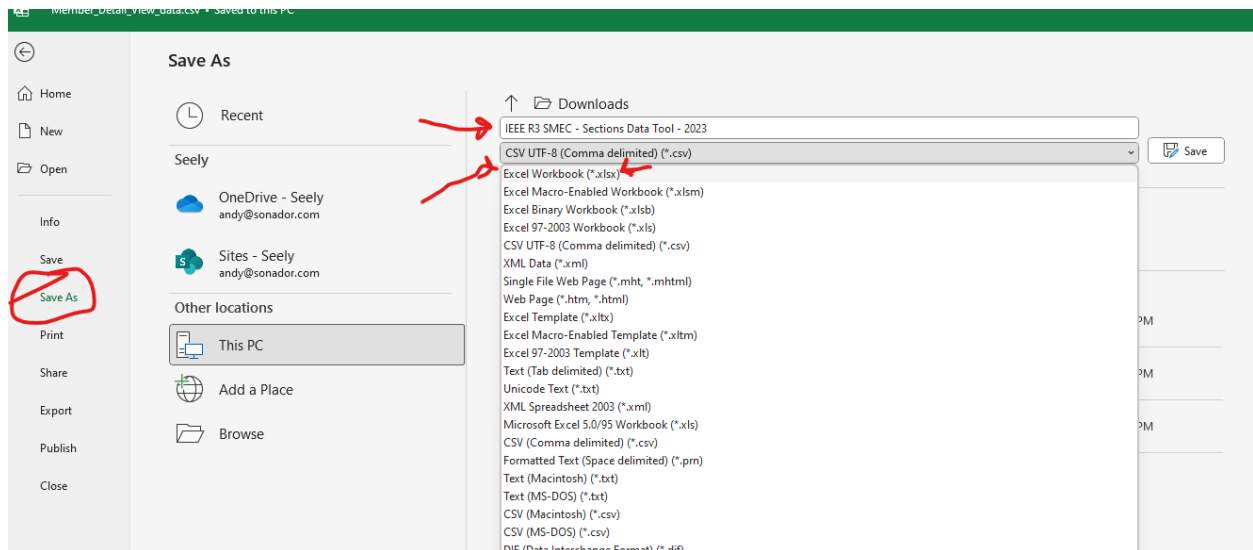
PowerPoint

Tableau Workbook

OU Type	OU Name	Position	Position Description	Last Name	First Name	Middle Name	Email Address	Grade	Gender	Position Start	Position End	Country
Section	Alabama Section	Administra	Attendance C	Brown	Rov	I	rovbrown@southernco	Life Senior	Male	14-Mar-2017		USA



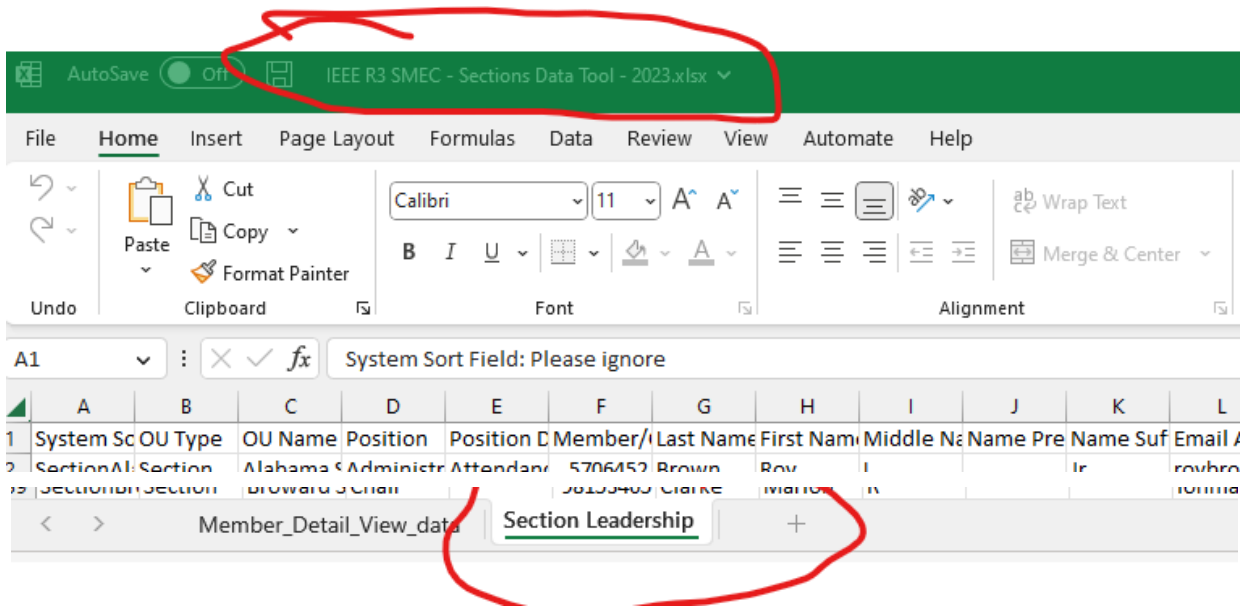
Open the Member Detail View downloaded CSV file and save as an XLSX Excel Spreadsheet file. Rename as appropriate.



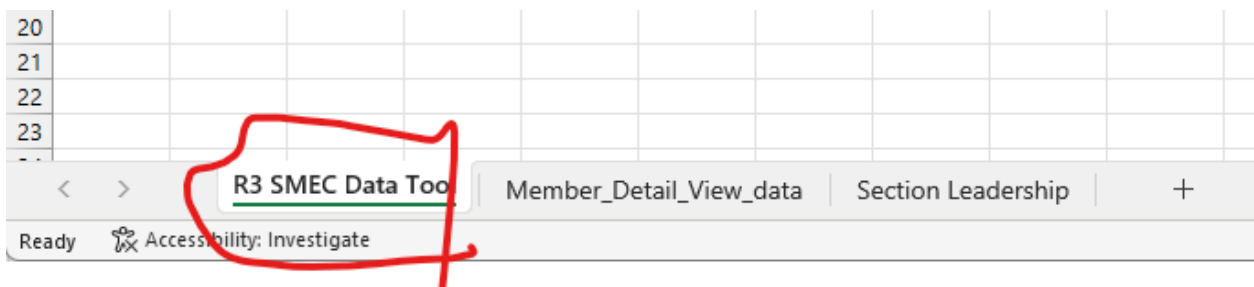
Open the volunteer CSV file. Select all rows and columns and copy to the clipboard.



In the Data Tool Excel file previously created, add a new data sheet tab and paste the volunteer data into that tab.



Add a third tab labeled SMEC Data Tool.



Manually enter these labels in column A of the Data Tool Tab.

	A	B	C	D	E	F	G
1	Section						
2	Chair						
3	Vice						
4	Secretary						
5	Membership						
6	Others						
7							
8	Membership						
9	Section membership total						
10	Life Members						
11	Members with over 10 years membership						
12	Senior Members						
13	Life Senior Members						
14	Fellows						
15	Eligible to be a reference						
16	Percent of total membership						
17	Eligible to be nominated						
18	Percent of total membership						
19							
20	Region						
21	Positive contact with R3 SMEC in 2023						
22	Number new SM in 2023						
23	Number new SM nominated by section						
24							
25	Roundups						
26	February						
27	Provide nominator						
28	Number nominated						
29							
30	March						
31	Provide nominator						
32	Number nominated						
33							
34	May						
35	Provide nominator						
36	Number nominated						
37							
38	July						
39	Provide nominator						

Manually enter each section in the Region in row 1, Columns B-on. Note that these entries must exactly match the section names in the OU data. Enter the below formulas in column B, rows 2-17. Then copy those formulas across all columns. Note that these formulas require Office 2016 or O365 for the XLOOKUP feature.

The top screenshot shows the Excel formula bar with the formula: `=XLOOKUP(1, ('Section Leadership'!$C:$C=B$1)*('Section Leadership'!$D:$D=$A2), 'Section Leadership'!$L:$L, '')`. A red circle highlights this formula. Below the formula bar, a portion of the spreadsheet is visible, showing columns A and B. Column A contains section names, and column B contains the corresponding data. A red arrow points from the formula bar to the first row of data.

The bottom screenshot shows a larger portion of the spreadsheet. Column A contains section names, and column B contains the corresponding data. The formulas in column B are as follows:

Section	Formula
Alabama Section	<code>=XLOOKUP(1, ('Section Leadership'!\$C:\$C=B\$1)*('Section Leadership'!\$D:\$D=\$A2), 'Section Leadership'!\$L:\$L, '')</code>
Atlanta Section	<code>=XLOOKUP(1, ('Section Leadership'!\$C:\$C=B\$1)*('Section Leadership'!\$D:\$D=\$A3), 'Section Leadership'!\$L:\$L, '')</code>
Broward Section	<code>=XLOOKUP(1, ('Section Leadership'!\$C:\$C=B\$1)*('Section Leadership'!\$D:\$D=\$A4), 'Section Leadership'!\$L:\$L, '')</code>
Canaveral Section	<code>=XLOOKUP(1, ('Section Leadership'!\$C:\$C=B\$1)*('Section Leadership'!\$D:\$D=\$A5), 'Section Leadership'!\$L:\$L, '')</code>
Central Georgia Section	<code>=XLOOKUP(1, ('Section Leadership'!\$C:\$C=B\$1)*('Section Leadership'!\$D:\$D=\$A6), 'Section Leadership'!\$L:\$L, '')</code>
Membership Development	<code>=COUNTIF(Member_Detail_View_data!\$C:\$C,B1)</code>
Section membership total	<code>=COUNTIFS(Member_Detail_View_data!\$C:\$C,B1, Member_Detail_View_data!\$K:\$K,\$A\$9)</code>
Life Members	<code>=COUNTIFS(Member_Detail_View_data!\$C:\$C,B\$1, Member_Detail_View_data!\$K:\$K,"Member", Member_Detail_View_data!\$L:\$L, "<"&TODAY()-3650)</code>
Members with over 10 years membership	<code>=COUNTIFS(Member_Detail_View_data!\$C:\$C,B\$1, Member_Detail_View_data!\$K:\$K,\$A\$11)</code>
Senior Members	<code>=COUNTIFS(Member_Detail_View_data!\$C:\$C,B\$1, Member_Detail_View_data!\$K:\$K,\$A\$12)</code>
Life Senior	<code>=COUNTIFS(Member_Detail_View_data!\$C:\$C,B\$1, Member_Detail_View_data!\$K:\$K,\$A\$13)</code>
Fellow	<code>=SUM(B11:B13)</code>
Eligible to be a reference	<code>=(B14/B8)*100</code>
Percent of total membership	<code>=B9+B10</code>
Eligible to be nominated	<code>=B9+B10</code>
Percent of total membership	<code>=(B16/B8)*100</code>

`=XLOOKUP(1, ('Section Leadership'!$C:$C=B$1)*('Section Leadership'!$D:$D=$A2), 'Section Leadership'!$L:$L, '')`
`=XLOOKUP(1, ('Section Leadership'!$C:$C=B$1)*('Section Leadership'!$D:$D=$A3), 'Section Leadership'!$L:$L, '')`
`=XLOOKUP(1, ('Section Leadership'!$C:$C=B$1)*('Section Leadership'!$D:$D=$A4), 'Section Leadership'!$L:$L, '')`
`=XLOOKUP(1, ('Section Leadership'!$C:$C=B$1)*('Section Leadership'!$D:$D=$A5), 'Section Leadership'!$L:$L, '')`
`=COUNTIF(Member_Detail_View_data!$C:$C,B1)`
`=COUNTIFS(Member_Detail_View_data!$C:$C,B1, Member_Detail_View_data!$K:$K,A9)`
`=COUNTIFS(Member_Detail_View_data!$C:$C,B$1, Member_Detail_View_data!$K:$K,"Member", Member_Detail_View_data!$L:$L, "<"&TODAY()-3650)`
`=COUNTIFS(Member_Detail_View_data!$C:$C,B$1, Member_Detail_View_data!$K:$K,A11)`
`=COUNTIFS(Member_Detail_View_data!$C:$C,B$1, Member_Detail_View_data!$K:$K,A12)`
`=COUNTIFS(Member_Detail_View_data!$C:$C,B$1, Member_Detail_View_data!$K:$K,A13)`
`=SUM(B11:B13)`
`=(B14/B8)*100`
`=B9+B10`
`=(B16/B8)*100`

The Data Tool is now complete. Summaries of membership in each section and current email addresses of registered officers are automatically populated. Subsequent updates can be applied by re-downloading the same datasets and copy-pasting them into the data tabs of the tool.

Note that in sections where officers have not been correctly registered in Vtools officer reporting, the email data may be blank in the tool. It is recommended to contact those sections and request they update officer listings, rather than just manually changing in the tool.

	A	B	C	D	E	F	G	H
1	Section	Alabama Section	Atlanta Section	Broward Section	Canaveral Section	Central Georgia Section	Central North Carolina Section	Central Savannah River Section
2	Chair	ga_jones2@att.net	alessio.medda@gtri.gatech.edu	lonmar66@gmail	paulnyffenegger@	jdhopkins@hotmail.com		svh@ml1.net
3	Vice Chair	arup.kr.ghosh@ieee.org	syed.tamseel@gmail.com	gilchrist.carolyn@	rob.harris@ieee.o	erin.mullinax@gmail.com	npeachey@rfmd.com	rileyhbryan@ieee.org
4	Secretary	d.diaz@ieee.org	charles.harris@gtri.gatech.edu		socci@ieee.org	mivey@ieee.org	jones@rfmd.com	
5	Membership Development							
7	Membership							
8	Section membership total	661	2894	331	125	163	217	136
9	Life Member	80	280	49	31	33	29	18
0	Members with over 10 years membership	110	514	60	27	43	48	30
1	Senior Member	86	463	38	9	11	40	8
2	Life Senior	49	151	31	13	14	12	17
3	Fellow	8	67	0	0	0	2	0
4	Eligible to be a reference	143	681	69	22	25	54	25
5	Percent of total membership	21.63	23.53	20.85	17.60	15.34	24.88	18.38
6	Eligible to be nominated	190	794	109	58	76	77	48
7	Percent of total membership	28.74	27.44	32.93	46.40	46.63	35.48	35.29
8								
9	Region							
10	Positive contact with R3 SMEC in 2023							
11	Number new SM In 2023							
12	Number new SM nominated by section							
13								
14	Roundups							
15	February							
16	Provide nominator							
17	Number nominated							
18								
19	March							
20	Provide nominator							
21	Number nominated							

To give a detailed contact list to a specific section, go to the member detail tab. Filter on the section name in column C.

The screenshot shows an Excel spreadsheet with the following data:

Region	Council	Section	Member ID
R3	Florida Council		59881
R3	Florida Council		256487
R3	Florida Council		313445
R3	Florida Council		484121
R3	Florida Council		551465
R3	Florida Council		566661
R3	Florida Council		585109
R3	Florida Council		729624
R3	Florida Council		814244
R3	Florida Council		829481
R3	Florida Council		877449
R3	Florida Council		920686
R3	Florida Council		959031
R3	Florida Council		995159
R3	Florida Council		1058676
R3	Florida Council		1058759
R3	Florida Council		1083401
R3	Florida Council		1111707
R3	Florida Council		1116607
R3	Florida Council		1137215
R3	Florida Council		1190339
R3	Florida Council		1220482
R3	Florida Council		1274752

The filter dropdown for the 'Section' column is open, showing the following options:

- Sort A to Z
- Sort Z to A
- Sort by Color
- Sheet View
- Clear Filter From "Section"
- Filter by Color
- Text Filters
- Search
- Coastal South Carolina Section
- Columbia Section
- Daytona Section
- East Tennessee Section
- Eastern North Carolina Section
- Evansville-Owensboro Section
- Florida West Coast Section
- Gainesville Section
- Hampton Roads Section

The 'OK' button is highlighted, and the 'Cancel' button is also visible.

For a list of all eligible senior member candidates in a section, filter on column K, Grade. Select only Member and Life Member. In column AH, OK to Contact, de-select N and only filter on Y.

The screenshot shows an Excel spreadsheet with a filter menu open for the 'Grade' column (column K). The 'OK to contact' column (column AH) is also highlighted. The filter menu is open, showing options for 'Life Member' and 'Member' selected. The spreadsheet has columns labeled I, J, K, AH, and AI. The rows are labeled with names and degrees, such as 'Name', 'Email', 'Grade', 'OK to contact', 'PE', 'D.Eng', and 'Ph.D.'. The filter menu is open, showing options for 'Life Member' and 'Member' selected. The filter menu is open, showing options for 'Life Member' and 'Member' selected.

I	J	K	AH	AI
Name	Email	Grade	OK to contact	
	Sort A to Z		Y	
	Sort Z to A		Y	
PE	Sort by Color	>	Y	
D.Eng	Sheet View	>	Y	
	Clear Filter From "Grade"		Y	
	Filter by Color	>	Y	
	Text Filters	>	Y	
	Search		Y	
	<input checked="" type="checkbox"/> (Select All)		Y	
	<input type="checkbox"/> Affiliate		Y	
	<input type="checkbox"/> Associate Member		Y	
	<input type="checkbox"/> Fellow		Y	
	<input type="checkbox"/> Graduate Student Member		Y	
	<input type="checkbox"/> Life Fellow		Y	
Ph.D.	<input checked="" type="checkbox"/> Life Member		Y	
	<input type="checkbox"/> Life Senior		Y	
	<input checked="" type="checkbox"/> Member		Y	

Assuming that any Life Member by definition meets the 10 year experience requirement, you can also filter on Members with more than ten years of membership. Note that the senior member requirement is ten years of experience, not membership, but doing this filter can help create a valid contact list for recruiting purposes. Filter on Member only, then on OK to contact, then on Grade Effective Date. In Grade Effective Date, choose Date Filter->Before and enter a date that is 10 years before the current date.

The image shows a software interface with a filter menu and a dialog box. The filter menu is open for 'Grade Effective Date' and shows options like 'Sort Oldest to Newest', 'Sort Newest to Oldest', 'Sort by Color', 'Sheet View', 'Clear Filter From "Grade Effective Date"', 'Filter by Color', and 'Date Filters'. The 'Date Filters' option is checked. A sub-menu is open for 'Date Filters' showing options like 'Equals...', 'Before...', 'After...', 'Between...', 'Tomorrow', 'Today', 'Yesterday', 'Next Week', 'This Week', 'Last Week', 'Next Month', 'This Month', 'Last Month', and 'Next Quarter'. The 'Before...' option is selected. Below the filter menu is a 'Custom Autofilter' dialog box. The dialog box has a title bar 'Custom Autofilter' and a close button. It contains the text 'Show rows where: Grade Effective Date' and a dropdown menu with 'is before' selected. A date '4/1/2023' is entered in the text box. There are radio buttons for 'And' and 'Or', with 'And' selected. At the bottom, there are 'OK' and 'Cancel' buttons. The date '4/1/2023' is circled in red.