

**IEEE/PES TRANSFORMERS COMMITTEE
Association Management System (AM System)
-- Operating Instructions --**

FYI: As of October 2004, the Meetings SC Chair (presently Greg Anderson) is the primary System Administrator. The Committee Secretary (presently Tom Prevost) is the secondary System Administrator.

Notes:

1. Additional instructions can be found within the Help section of the AM System.
2. Our association ID is "IEEE-TRANSFORMERS".

INTRODUCTION

This innovative web-based system allows our Committee, subcommittees, working groups, task forces, and liaison associations to operate and communicate more effectively. Activity Leaders can maintain membership records, print activity/meeting rosters, and send emails. Fewer bounced emails will result because individual contact information is "self-maintained" by each individual and is stored in a single relational database used by all functions of the system. The new AM System will also provide us a more efficient and cost-effective on-line meeting registration system in the future (starting with our Spring 2005 Meeting).

MAJOR FUNCTIONS

1. Association Management System
 - membership directory (only accessible to Committee Members)
 - maintain activity membership lists
 - send emails to activity participants
 - print activity/meeting rosters
 - maintain historical meeting attendance records
 - determine "stale members" who have dropped out of participation (a future function)
2. Event Registration (upcoming function)
 - meeting pre-registration
 - meeting on-site registration
 - print namebadges
 - etc.

SECURITY AND PRIVACY

Every effort has been made to ensure that unauthorized access to personal contact information is limited. Although some limited contact information can be accessed one record-at-a-time, contact information of system participants in long-list format cannot be viewed by individual users or Activity Leaders.

Note: All system accesses and functions are logged! Anyone performing undesired or malicious (or accidental) activities can be identified. Any use of the system for commercial purposes -- for instance, numerous repetitive access to the Membership Directory to create marketing-type lists -- may result in permanent suspension from system access.

SYSTEM ACCESS

If you are an Activity Leader (SC/WG/TF chair, vice-chair, or secretary), you are provided "limited administrative rights" by a System Administrator. If you cannot access the AM System, contact a System Administrator to be provided administrative rights.

Major functions of the AM System can be accessed from the Transformers Committee website (www.transformerscommittee.org). Major system functions include: Sign-in, View or Modify Personal Profile, Membership Directory, and Control Center. Administrative functions are performed within Control Center.

HONOR SYSTEM

All Activity Leaders have the same administrative rights. Any activity can be modified by any Activity Leader! Although there are protections to limit someone from adding or deleting an activity, anyone with administrative rights can access and modify any activity -- not just those activities you are directly responsible for. All Activity Leaders operate on the "honor system". Please be careful to only make modifications to your activity! If you are an administrator of a "child activity" (a WG or TF), be especially careful to ensure you are making modifications to your activity and not the associated parent SC.

Note: All individual system accesses and functions are logged. Those performing malicious (or accidental activities) can be identified.

SYSTEM NAVIGATION

Important: When navigating through the system, DO NOT use the "back arrow" on your web-browser. Use the done/back/save radio buttons at the bottom.

LEVELS OF MEMBERSHIP (Important ... Understand This!)

There are essentially three levels of membership in the system:

- Committee Member (a "full voting member" of the Committee)
- Active Participant (not a Committee Member, but an active contributor and meeting attendee)
- Interested Participant (a "remote observer" and supporter of the Committee's scope)

Anyone can enroll in the AM System -- even those who desire to only passively monitor Committee work from a distance. Initially, a person is automatically enrolled as an Interested Participant. Once Committee membership or regular participation is validated by the System Administrator, enrollment is manually upgraded to Committee Member or Active Participant.

COMMITTEES, SUBCOMMITTEES, PARENT/CHILD COMMITTEES, ETC.

The AM System uses the term "committee" to refer to any activity. Although we are the "Transformers Committee" (TC), and have various activities such as subcommittees (SCs), working groups (WGs), and task forces (TFs), the AM System refers to all activities as committees.

Generally, "parent committees" refer to TC subcommittees and liaison activities (NEMA, ANSI activities, etc). Child committees are working groups and task forces "under" parent committees. Task forces can be created that operate directly under a subcommittee (as a child) or directly under a working group (as a grandchild).

MANAGE COMMITTEES (This is where you start!)

Most of the effort by Activity Leaders is performed from the "Manage Committee" area. After logging into the Control Center, the system should initially open into the ORGANIZATION section. If not, select the black tab "ORGANIZATION". The Manage Committee link is located towards the bottom of the left-hand side of the page.

Once the Manage Committee function is open, page to the desired TC subcommittee using the left and right arrows. Select a particular Subcommittee (fill-in the small circle to the left of the SC name) and select the Manage Children button. Navigate through the system to find the desired WG or TF.

ADDING PARTICIPANTS

Once the desired activity is located, select it by clicking the small circle to the left of the activity name. To add participants, select Add Participants.

Participants can be added two ways:

1. Search for an individual by entering their first or last name (or a part of their name) in the search boxes and then select the Search button at the bottom.
2. Without entering anything into the search boxes, select the Search button at the bottom to view a list of everyone entered into the AM System.

Participants can only be entered one at a time. Using the Member pull-down window, indicate their status in the activity as the Chair, Vice-chair, Secretary, Member or Guest. Once a participant is added, their name disappears from the list indicating they have been added.

Note: Only the chair, vice-chair, and secretary can send emails using the system. Also, the system does not support the role of a Co-chair or a Technical Editor.

If trying to add a participant, and they do not appear in the system (using method 1 or 2 above), it is because that individual has not signed-up into the AM System. Please help us to completely populate the system by contacting that individual and instructing them to sign-up to the AM System via the Transformers Committee website (go the AM System page and click on "Sign-in").

Generally, most individuals who have attended a past Committee meeting and participate regularly are enrolled in the AM System and have been upgraded to Committee Member or Active Participant membership status. If you try to enter a participant in an activity, and a warning appears that they "do not have access", it is because they have not been manually upgraded by a System Administrator to the Committee Member or Active Participant membership level (perhaps they have recently signed-up to the AM System and still need to be manually upgraded). Go ahead and bypass the warning, add them as a participant of the activity, and notify a System Administrator to investigate the situation.

You may view or remove participants by using the Manage Participants button on the Manage Committees page. You may also change their activity status (Chair, Vice-chair, Secretary, Member or Guest) using that function.

SENDING EMAILS

An email message may be disseminated to any activity/group (SC/WG/TF). This is done by sending an email from your regular email client (MS-Outlook, Lotus Notes, AOL, Yahoo, etc.) to the AM System. The AM System then forwards the emails to every participant added into the activity. Less "bounced emails" will happen because the individual contact information (email addresses, etc) are self-maintained by each individual.

To send an email, you must first "generate" an email address using the AM System. While in the Manage Committees section, click on the underlined name of the activity. This will display the associated committee profile information. Select the people you wish to send the message to by clicking on the radio button next to each desired type of member (i.e. Chair, Secretary, members, etc).

Important: When sending an email to a parent committee (perhaps a particular subcommittee), by default, the email will go to everyone within the parent committee AND all child committees. If you want the email to go to parent group only, then under Status, uncheck "All" and check the "Active only" box.

At the bottom of that page, click on Generate Addresses. A long strange-looking email address will appear; e.g. list+Dist+ieee-transformers@123signup9.com. Cut-and-paste that long email address into the "TO" box of your email client and send an email as you normally would. You can include an attachment in the email as well.

Note: If you use an email system that uses a separator other than a comma, you may need to replace the commas in the address string with the appropriate separator symbol (i.e. for Outlook, you will need to use a semicolon instead of the comma).

Initially, only the chair, vice-chair or secretary of the activity can send an email (we may allow manual selection of other individuals later). Also, it may take up to two hours to completely disseminate a message.

Important: If you use your IEEE alias email address to log-in, you need to add a "secondary email" address into your profile. When you send an email to the AM System to be disseminated, the system validates the email address the message was sent from, against both the primary and second email addresses. If your work email address is entered as the secondary email address, and you wish to send an email from another email client (perhaps from your home), you will need to temporarily change the secondary email address before sending an email.

PRINTING ROSTERS

A "Committee Roster" may be printed and taken to a meeting and used to record attendance of an activity. It may also be downloaded into CSV format and pasted into a spreadsheet for further manipulation.

First, click on the black REPORTS tab at the top of the AM System. Select or expand (with the +/- button in the left column) the link to Subgroup Roster. Choose Committee Reports. Select the desired committee (SC/WG/TF) and choose Create Report (creates a PDF file) or Download (creates a CSV formatted file). Once a report is selected, it must be created by the AM System. Select the report and click on Refresh. Once the circle to the right turns green, the report is created it may then be viewed by clicking on the underlined name.

This roster does not include extensive contact information (snail-mail addresses, phone/fax numbers, etc). It is no longer necessary for individual activity chairs to maintain that information as it is now self-maintained by individual participants.

Note: We hope to improve the usefulness of the roster soon by allowing an activity leader to select whether activity members or guests are included in the roster. Hopefully by Spring 2005, two separate rosters can be printed -- one with only members, one with only guests.

RECORDING MEETING ATTENDANCE

Attendance at individual activity meetings can be recorded.

To do this: While working in the Manage Committees portion of the AM System, select a particular activity, and click on New Meeting. Complete the required information as follows:

- Name: Suggest "Fall 2004" or similar
- Place: Suggest "Las Vegas" or similar
- Description: Although not necessary, a description of the meeting may be added.

Once the information is added, click on Save.

After the meeting, click on View Calendar, select the desired meeting, and record attendance. You may also enter past meetings if desired to record historical attendance and track participation.

After the next upgrade of the system (hopefully by Spring 2005), other reports will be available such as a "Inactive Member" report, which will enable activity leaders to determine which activity participants have dropped out of participation.