123Signup (AMS) – Officer's Training

AGENDA:

- Accessing the 123Signup Control System
  - Roles and Responsibilities
- Committee Structure
- Managing Committees
  - Creating a New Committee
  - Manage Participants
    - Add/Remove Participants
    - Assign Roles
  - Rosters and Attendance
- Email Tools

123Signup (AMS) – Officer's Training

- Accessing the 123Signup Control System

www.123signup.com → **Client Login**

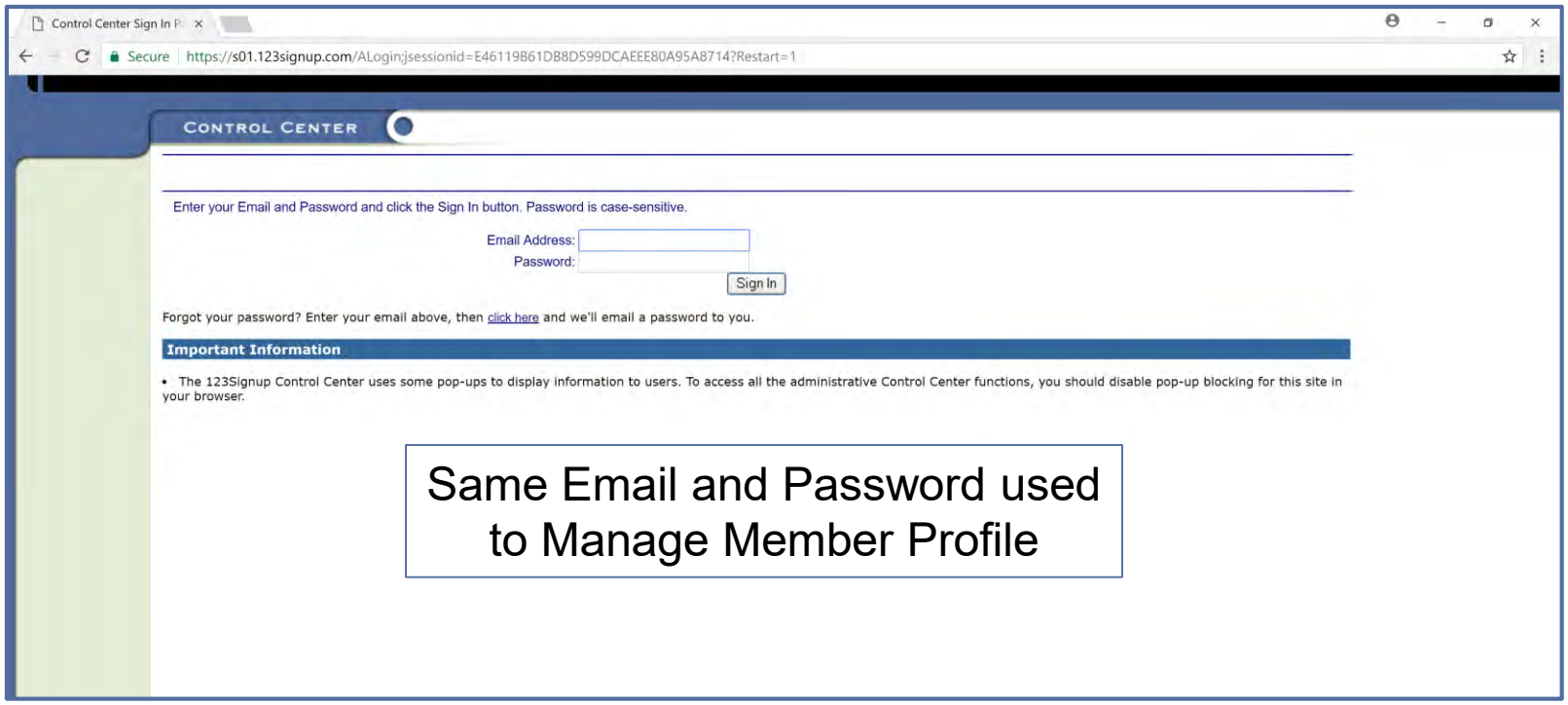
OR

http://www.ewh.ieee.org/soc/pes/switchgear/

→ Meetings → AMS Intro → AMS Control Center

123Signup (AMS) – Officer's Training

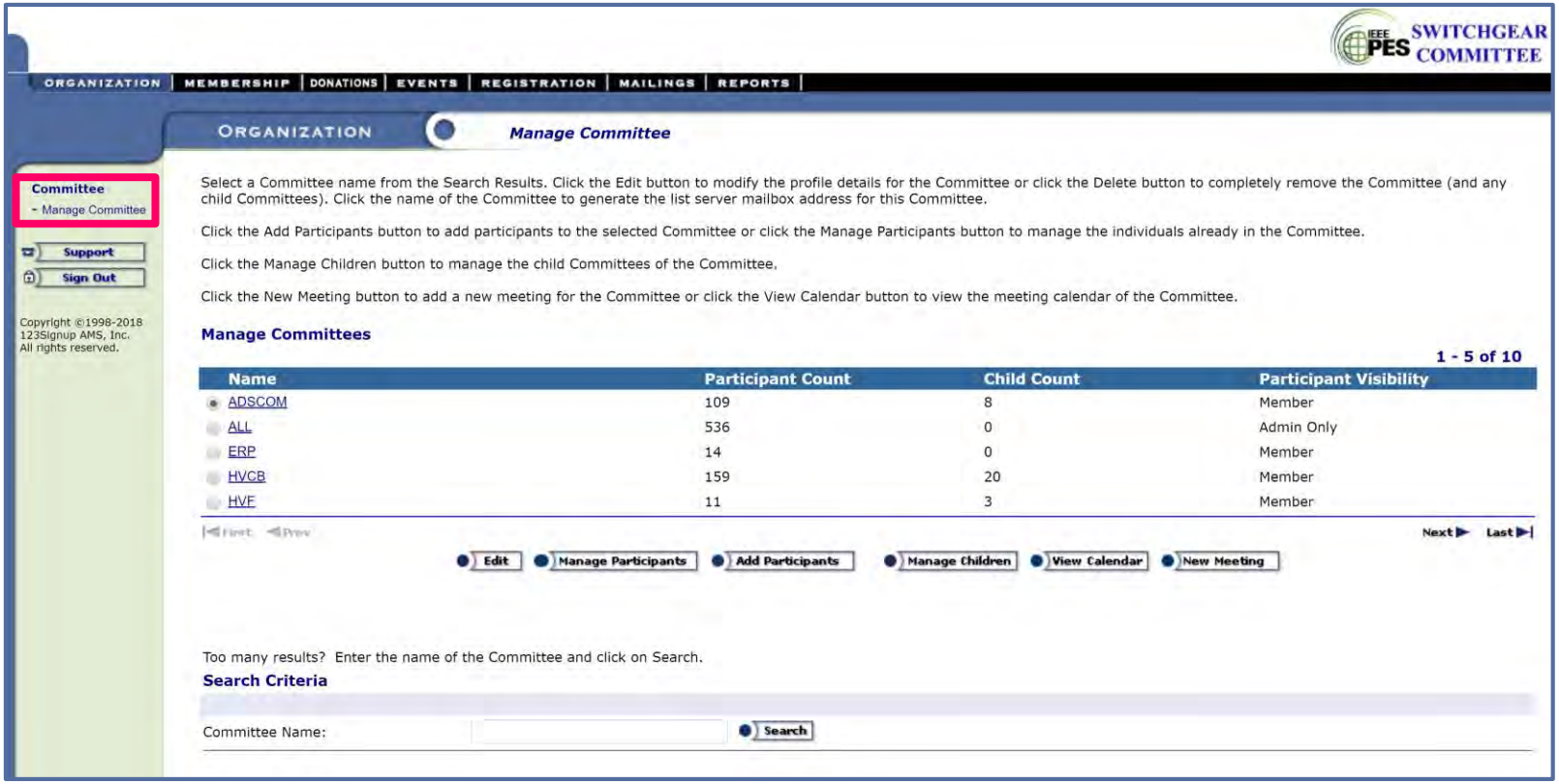
- Accessing the 123Signup Control System



- Committee Admins can only be added by System Administrators
  - Contact SGC Officer for access (T. Irwin, K. Flowers, D. Edwards)

123Signup (AMS) – Officer's Training

- Accessing the 123Signup Control System



123Signup (AMS) – Officer's Training

- Roles and Responsibilities

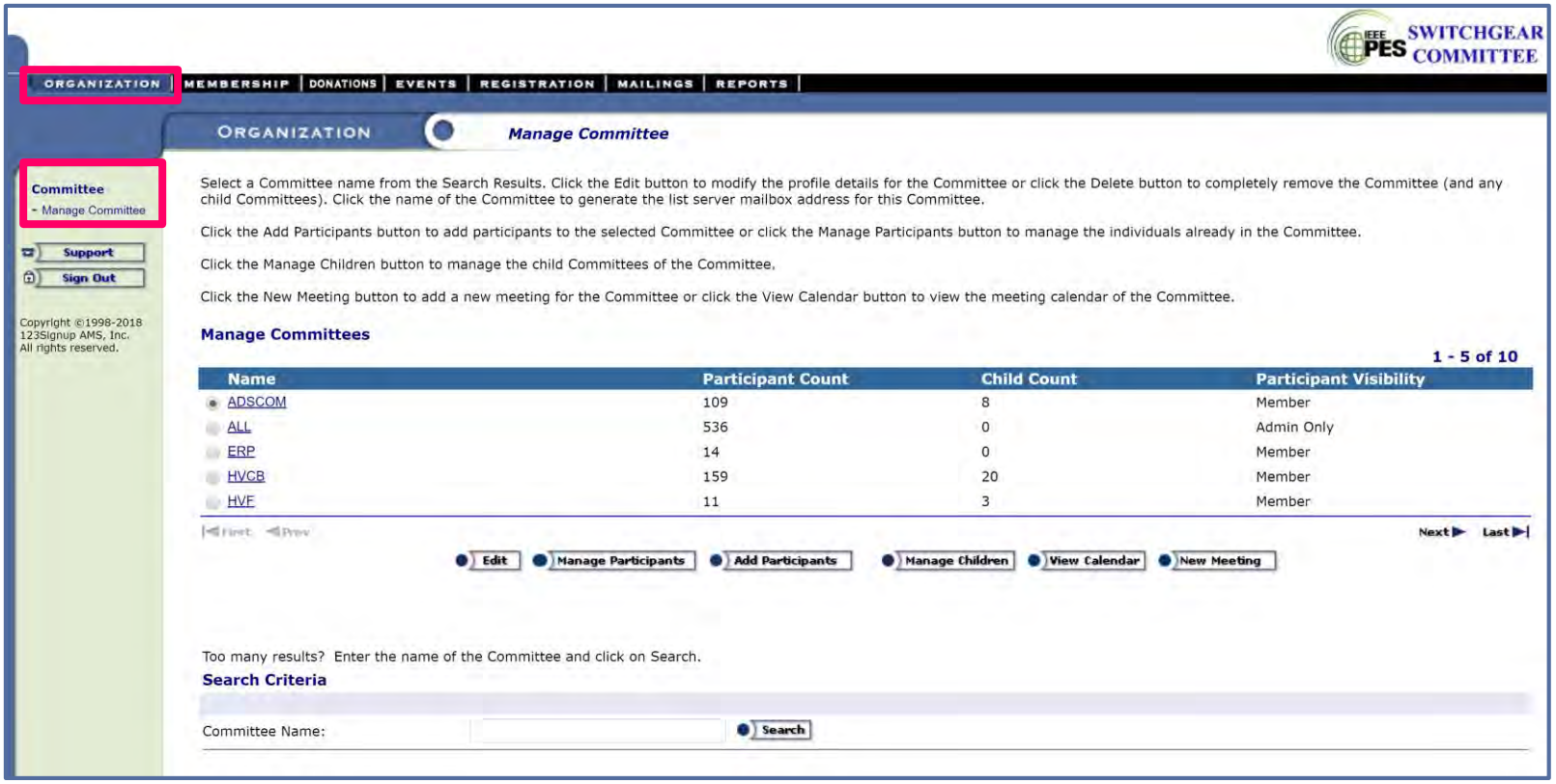
HONOR SYSTEM

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.

123Signup (AMS) – Officer's Training

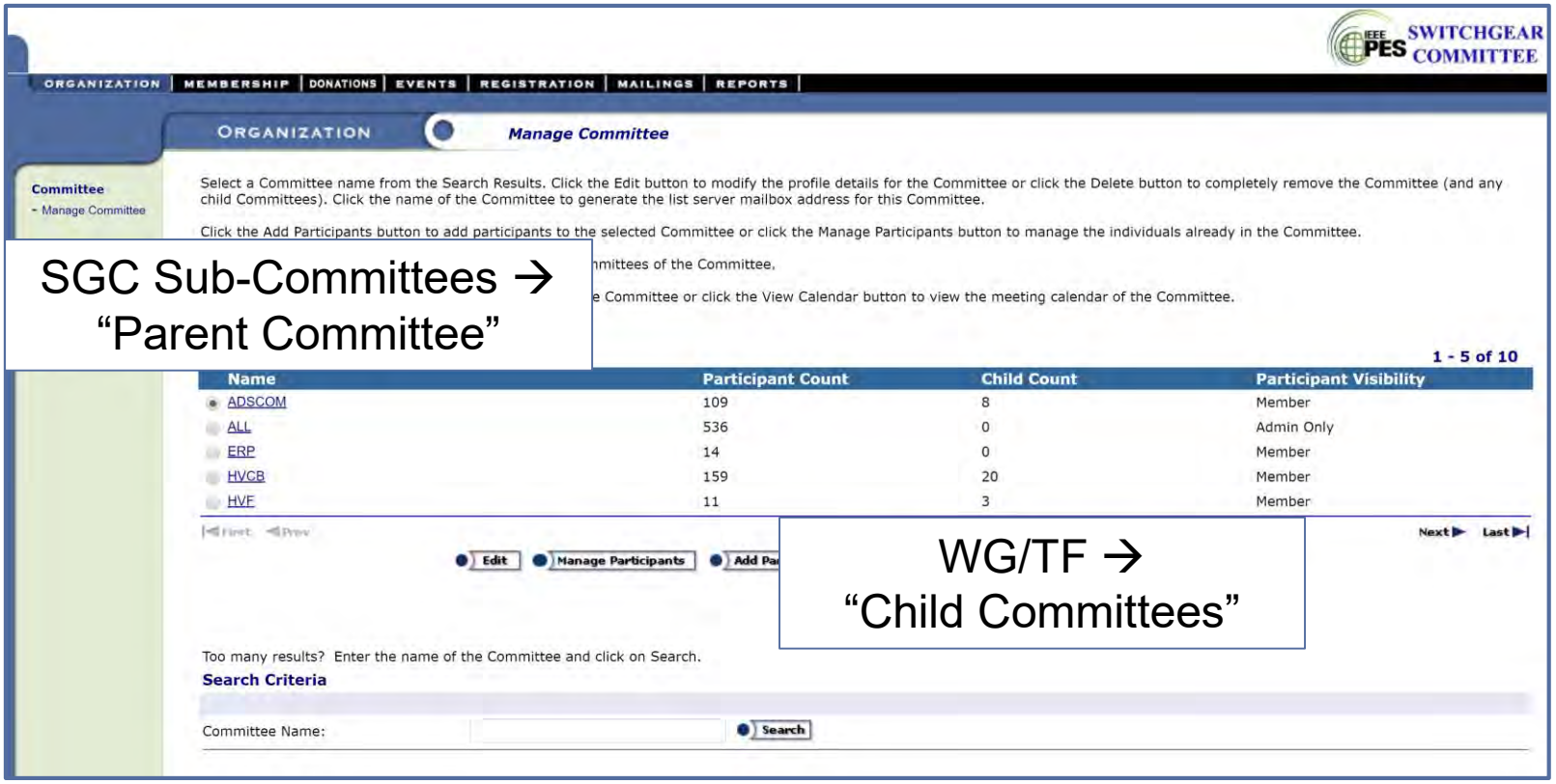
- Committee Structure



- Committees can only be added/removed by System Administrators
- All Activity Leaders have visibility and access to all Committees

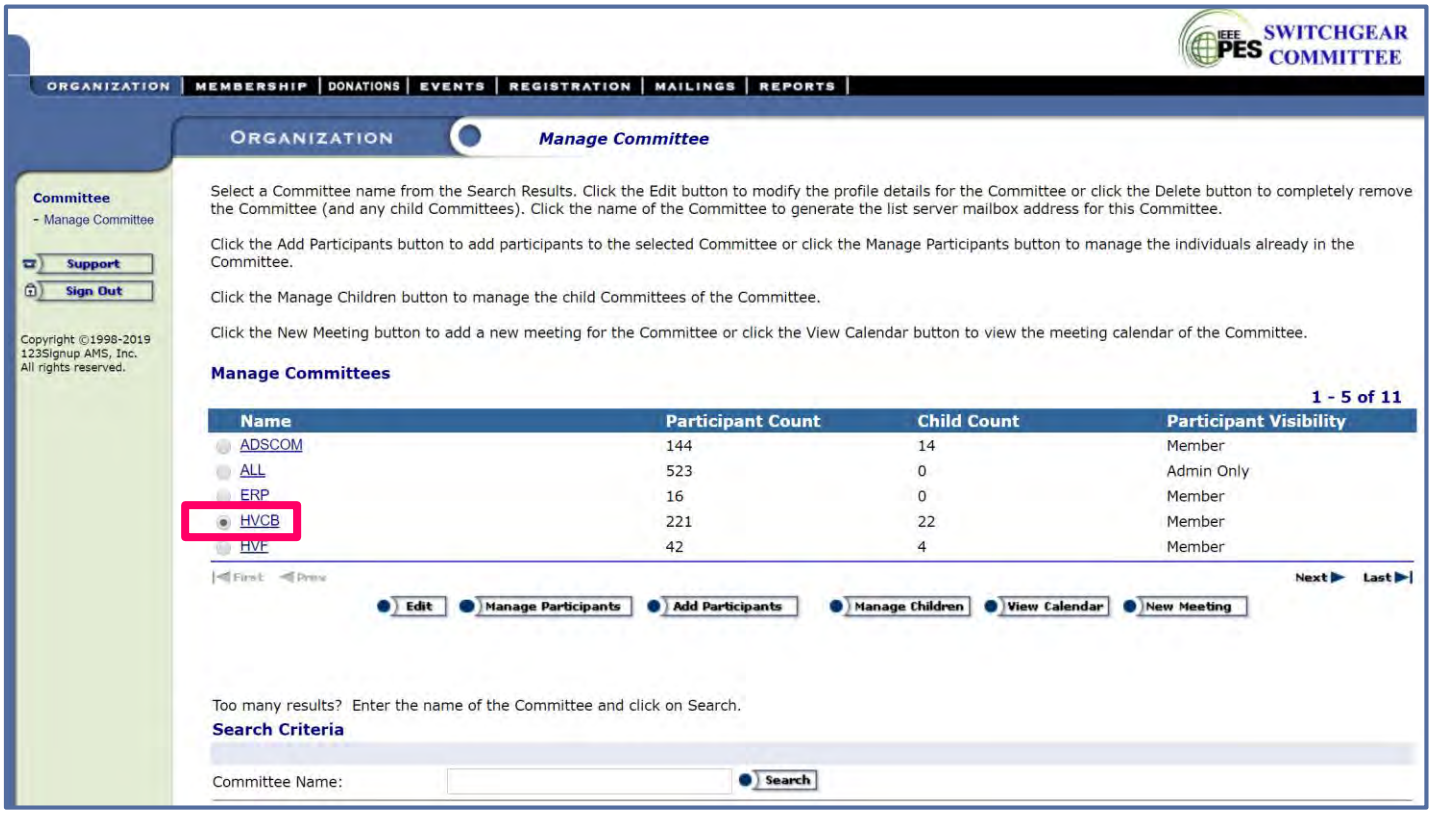
123Signup (AMS) – Officer's Training

- Committee Structure



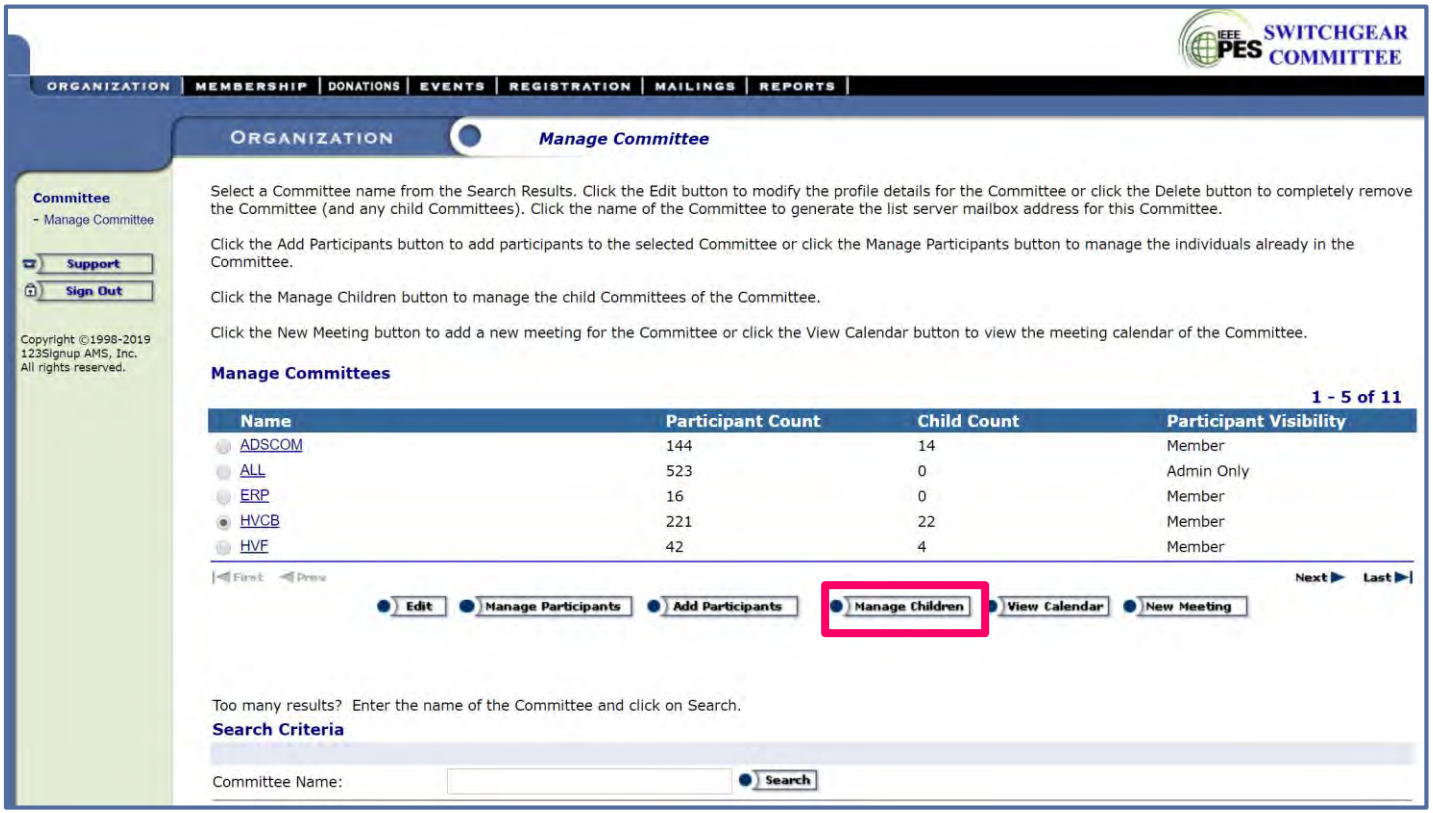
123Signup (AMS) – Officer's Training

- Managing Committee – "Test" Committee



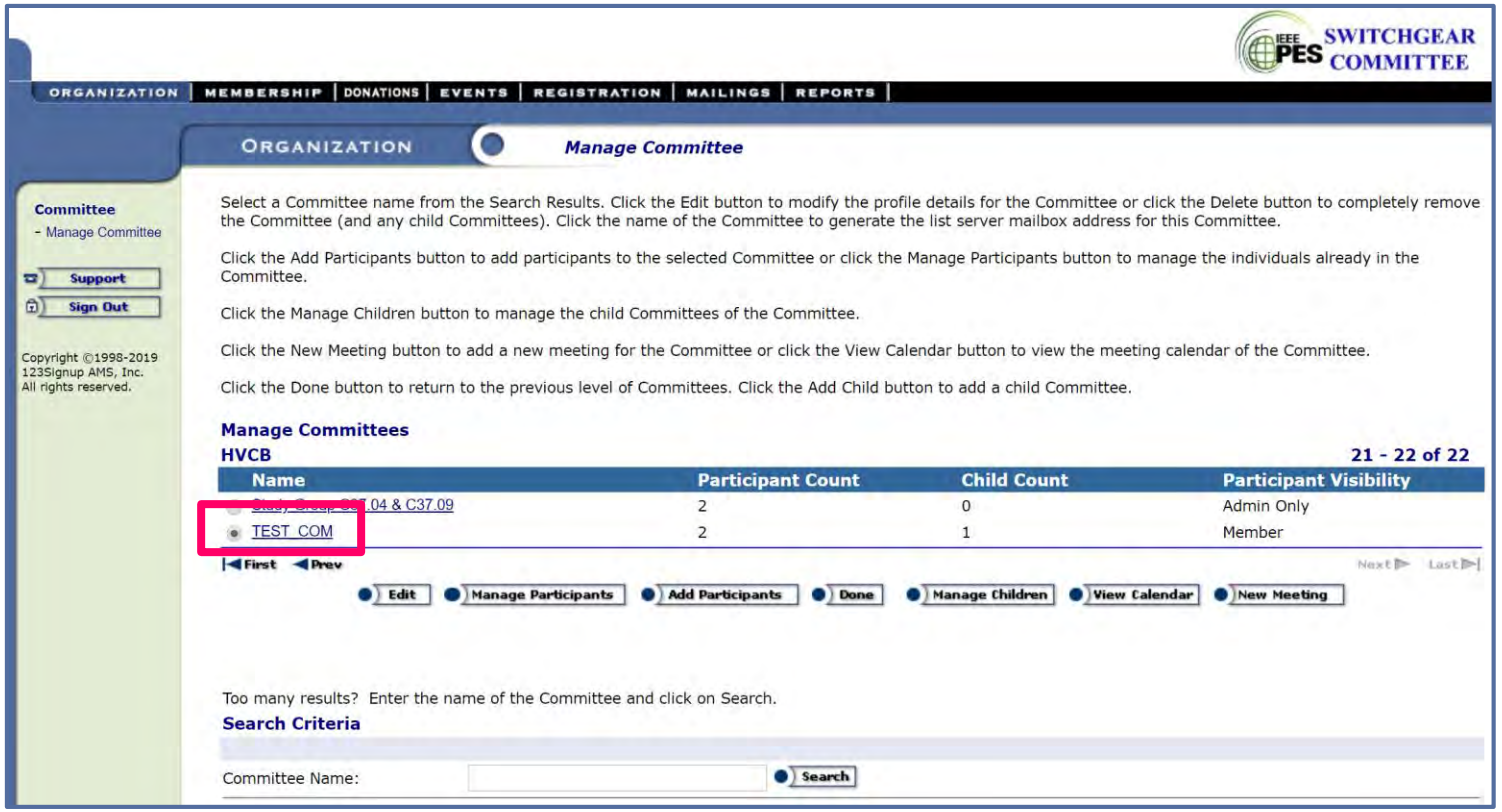
123Signup (AMS) – Officer's Training

- Managing Committee - "Test" Committee



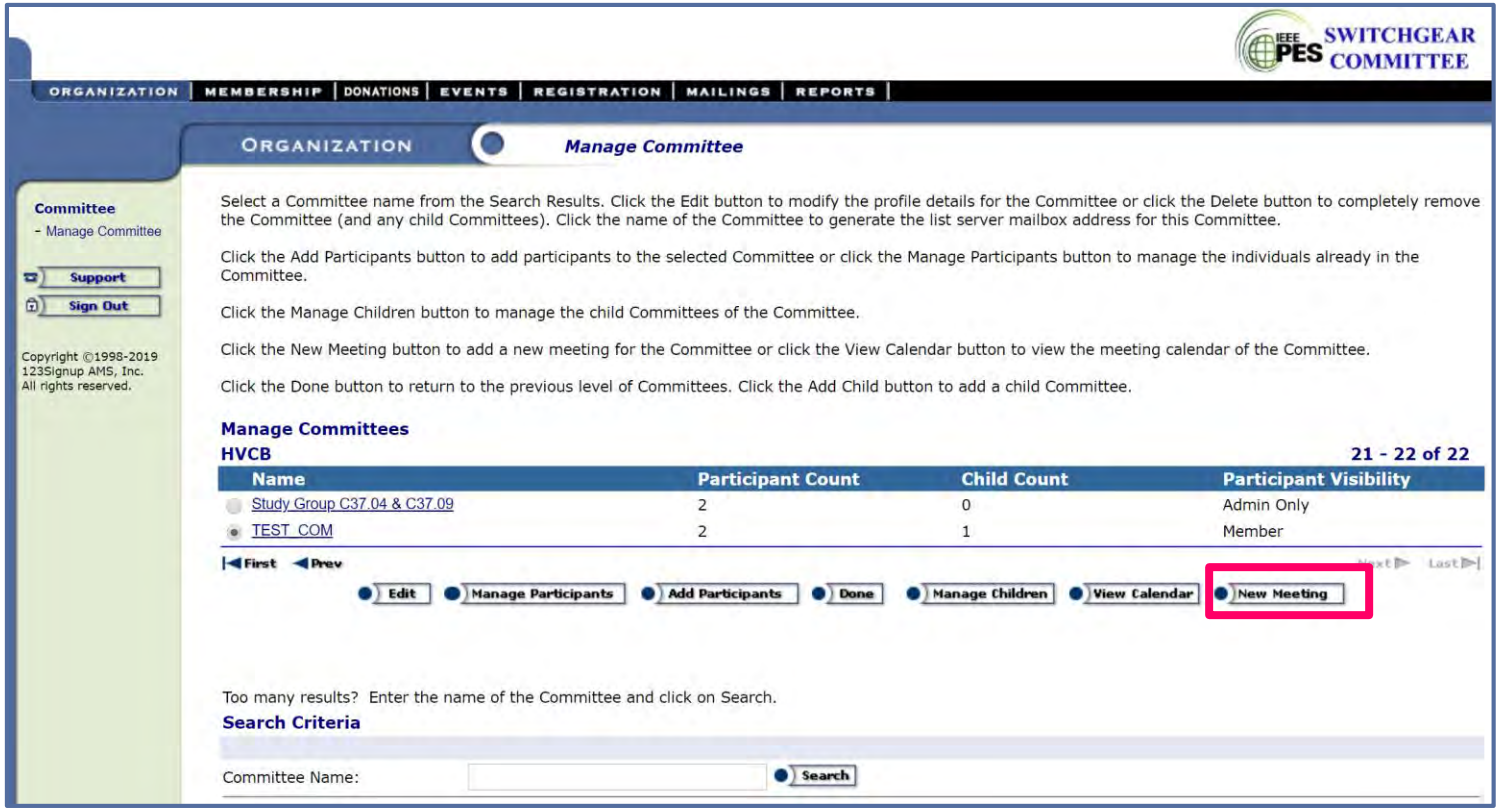
123Signup (AMS) – Officer's Training

- Managing Committee – "Test" Committee



123Signup (AMS) – Officer's Training

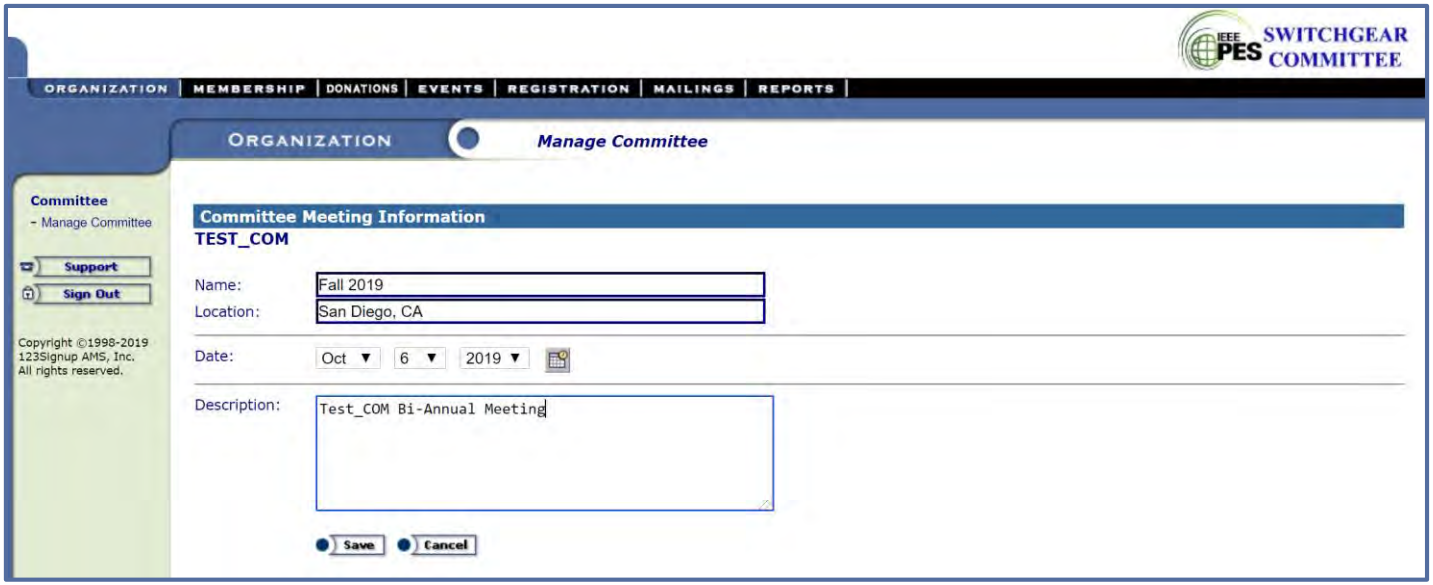
- Managing Committee - Creating a Meeting



- Officers should create a "New Meeting" for each session

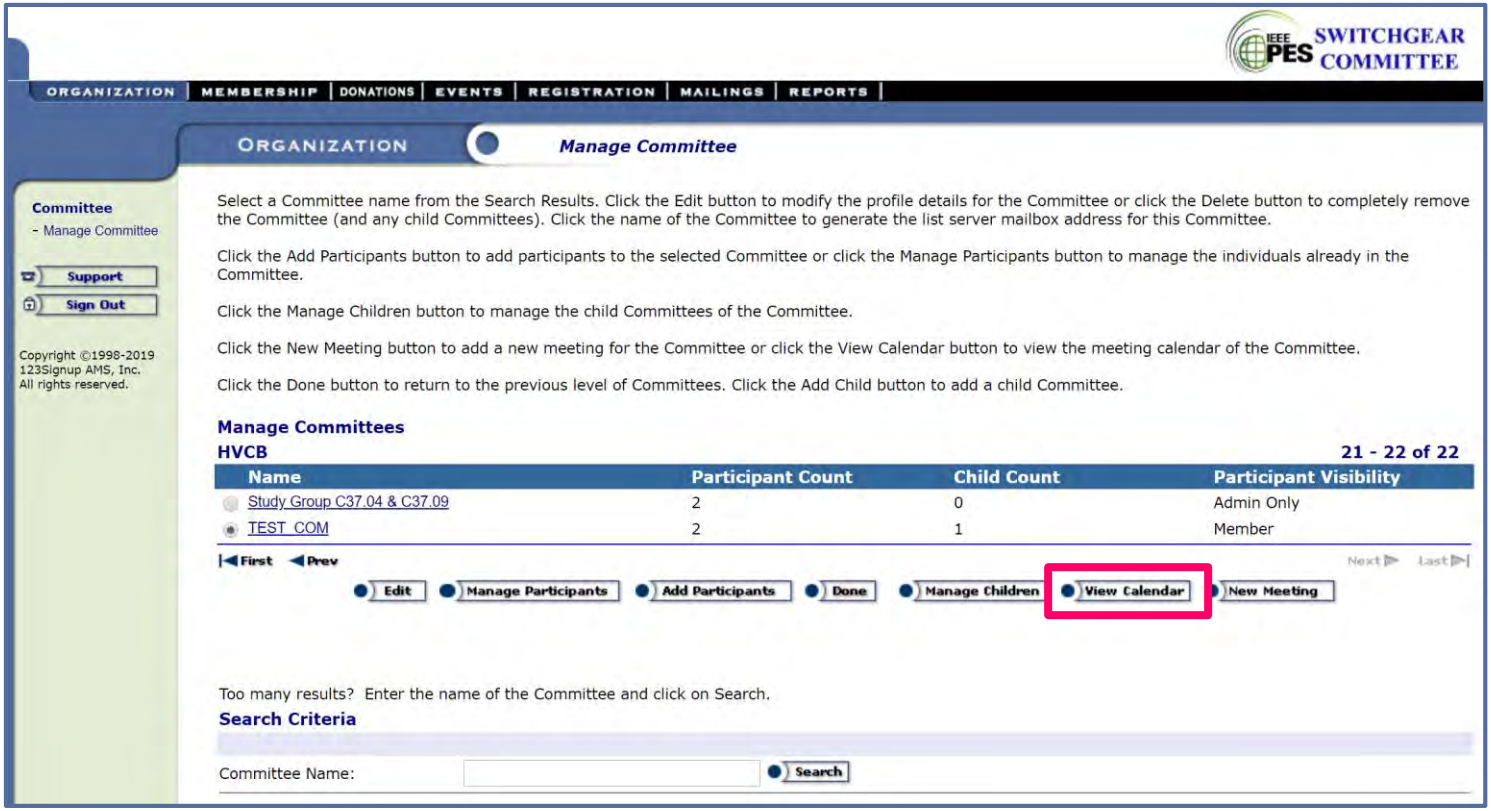
123Signup (AMS) – Officer's Training

- Managing Committee - Creating a Meeting



123Signup (AMS) – Officer's Training

- Managing Committee - Accessing a Meeting



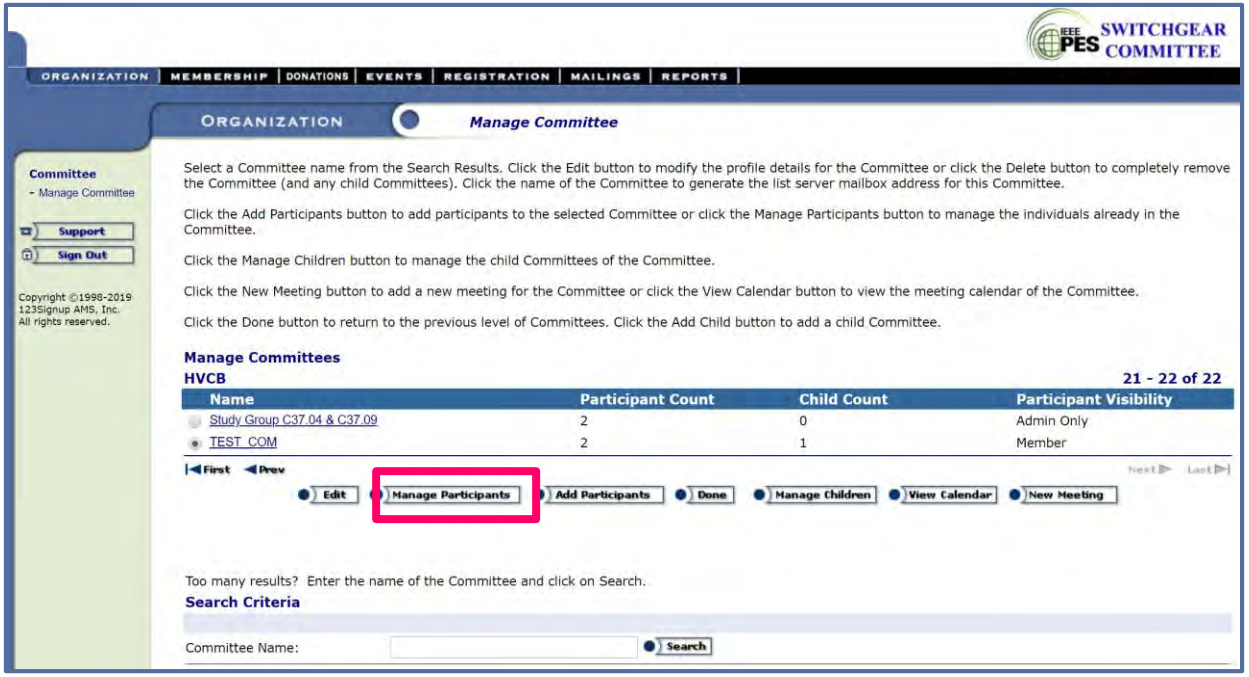
123Signup (AMS) – Officer's Training

- Managing Committee - Accessing a Meeting

- Provides access to the attendance roster

123Signup (AMS) – Officer's Training

- Managing Committee - Manage Participants

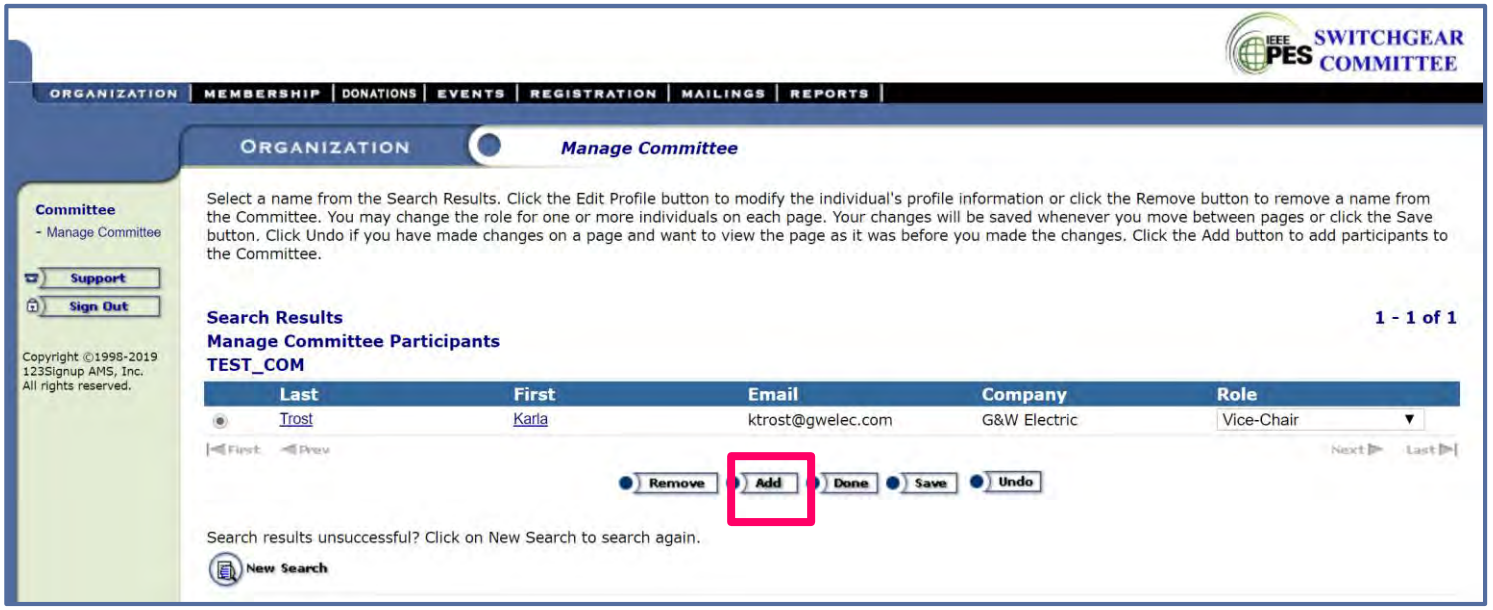


Why is this important?

1. GDPR compliance requires IEEE PES Switchgear Committees generate all rosters from 123Signup.
2. Provides visibility of participant roles for Committee Officers (point of contact, meeting quorum, etc.)
3. Expedites meeting attendance process.

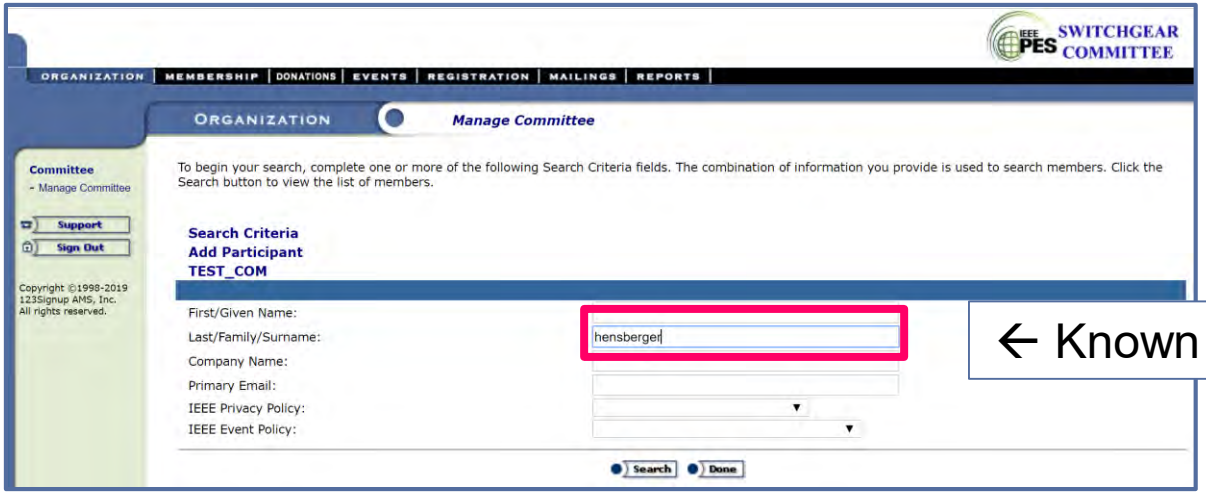
123Signup (AMS) – Officer's Training

- Managing Committee - Add Participants



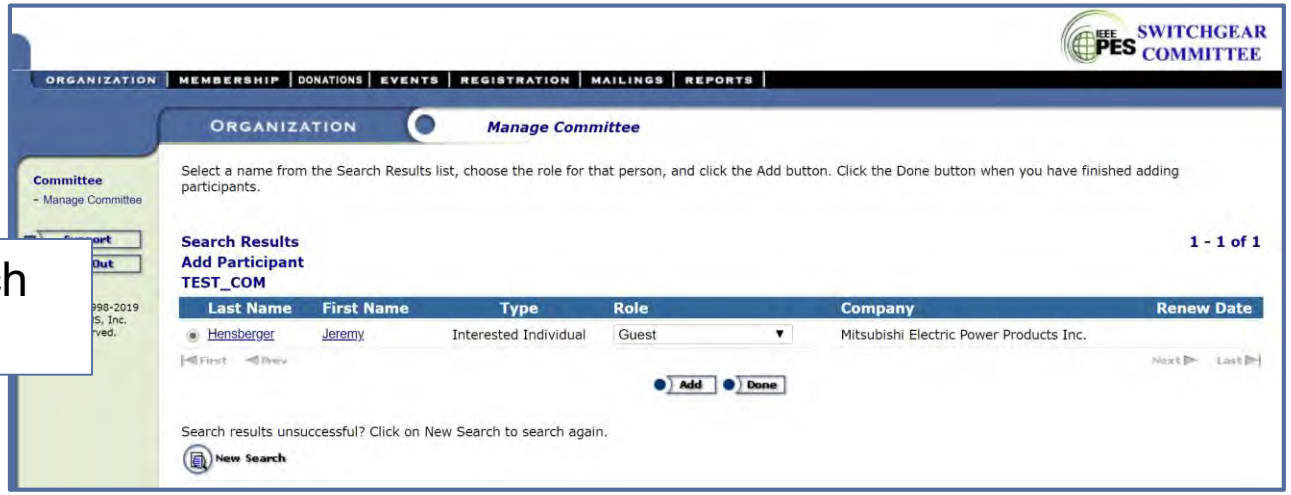
123Signup (AMS) – Officer's Training

- Managing Committee - Add Participants: Method A



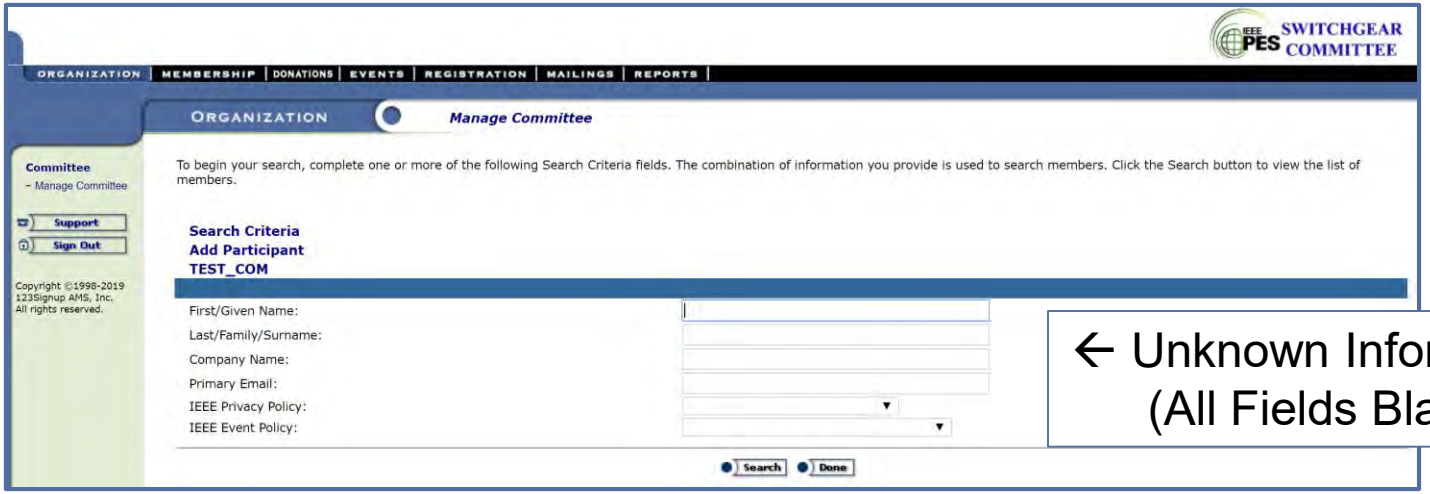
← Known Information

Limited Search Results →

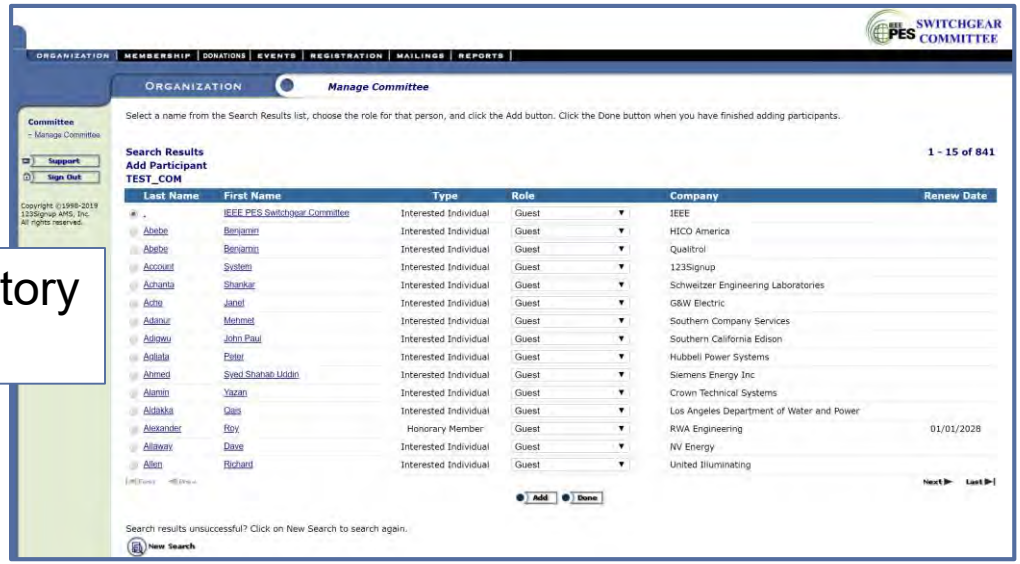


123Signup (AMS) – Officer's Training

- Managing Committee - Add Participants: Method B



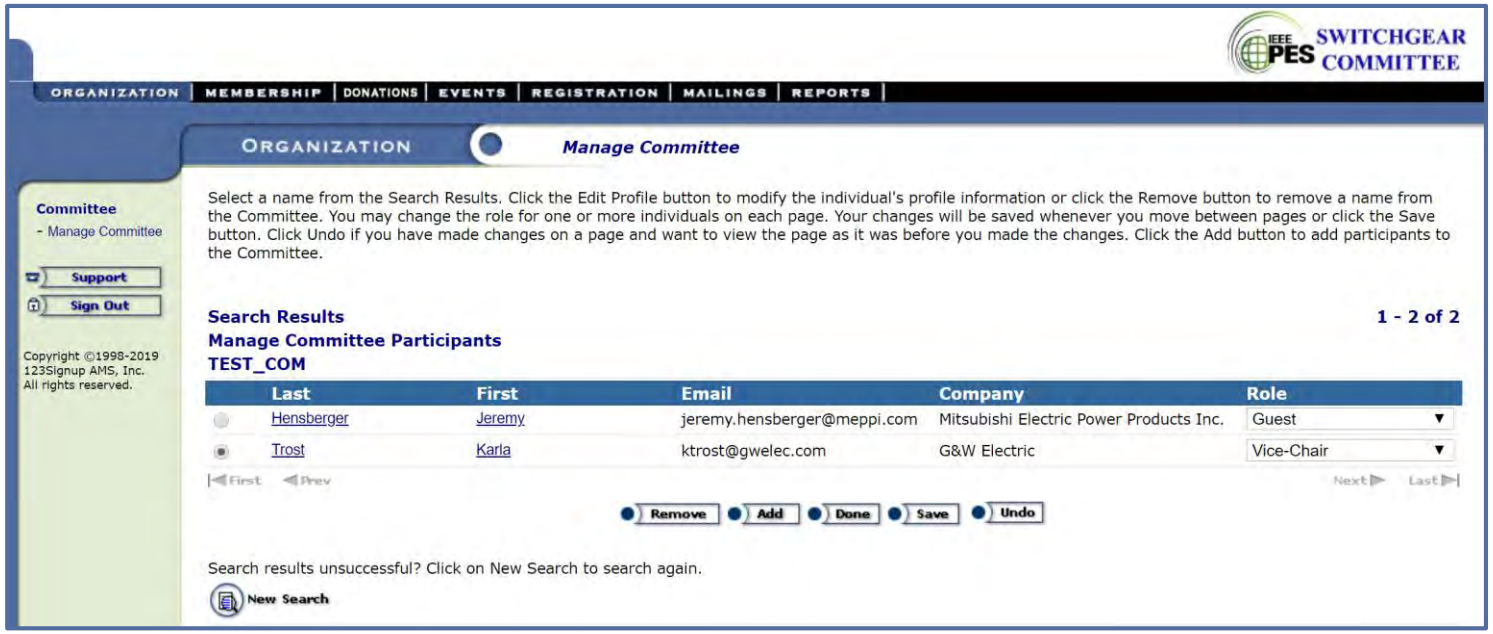
← Unknown Information (All Fields Blank)



Complete 123Signup Directory in Search Results →

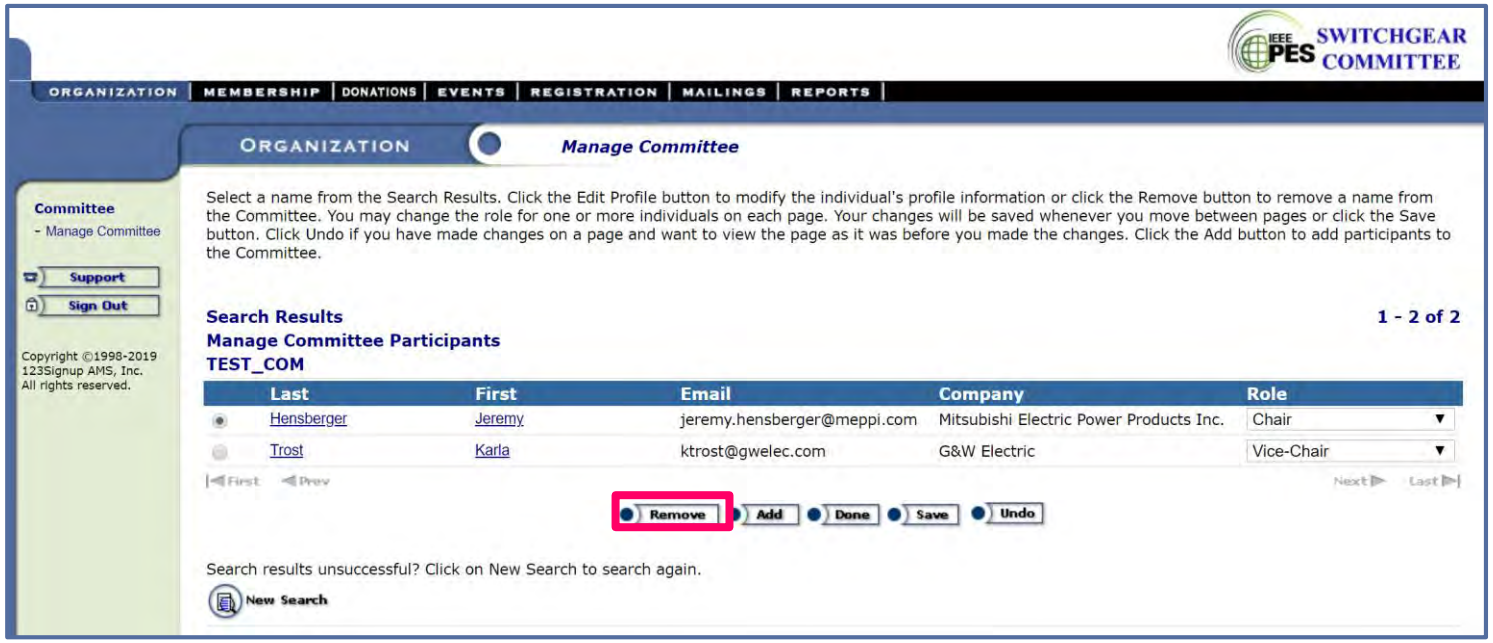
123Signup (AMS) – Officer's Training

- Managing Committee - Add Participants



123Signup (AMS) – Officer's Training

- Managing Committee - Removing Participants

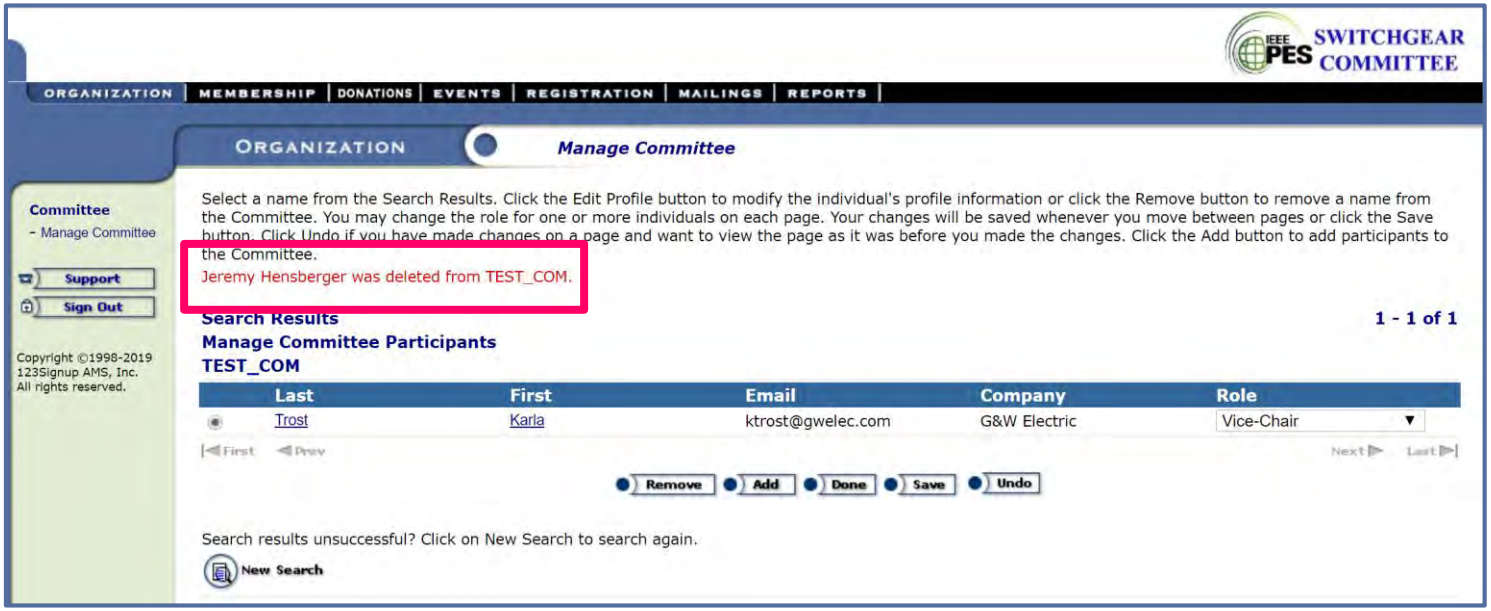


123Signup (AMS) – Officer's Training

- Managing Committee - Removing Participants

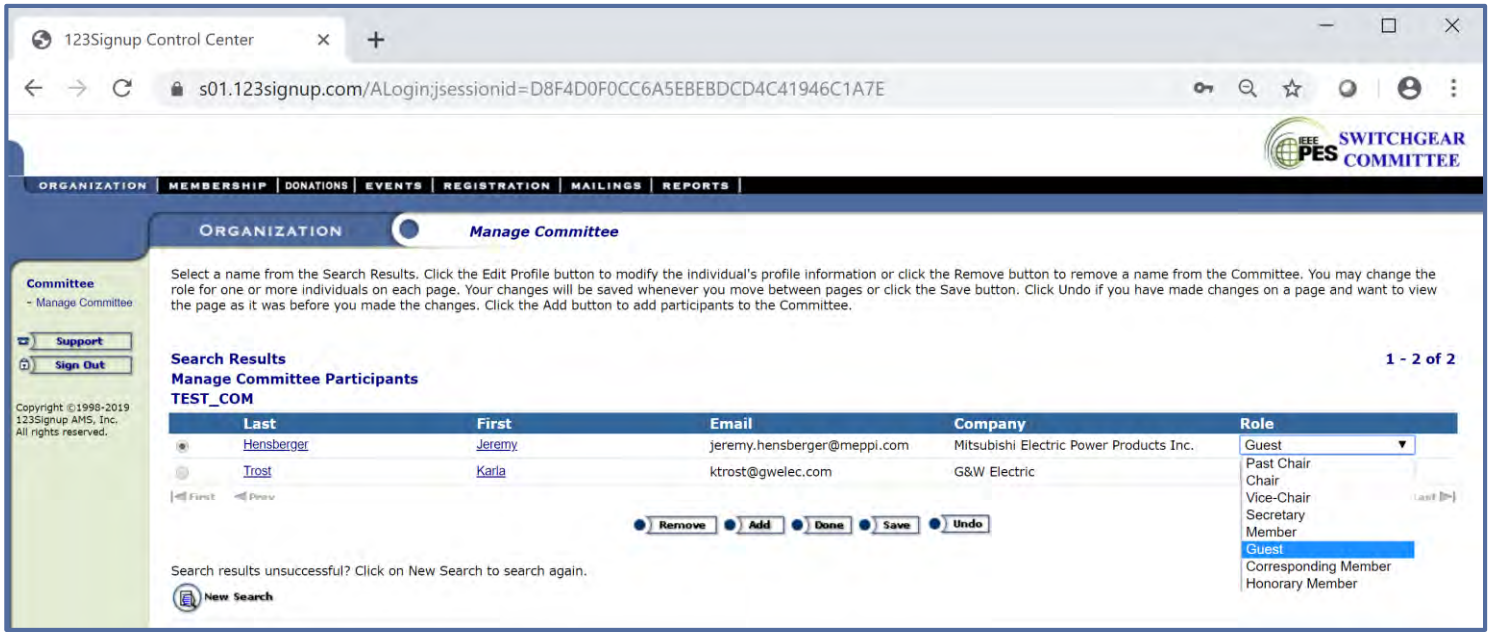
123Signup (AMS) – Officer's Training

- Managing Committee - Removing Participants



123Signup (AMS) – Officer's Training

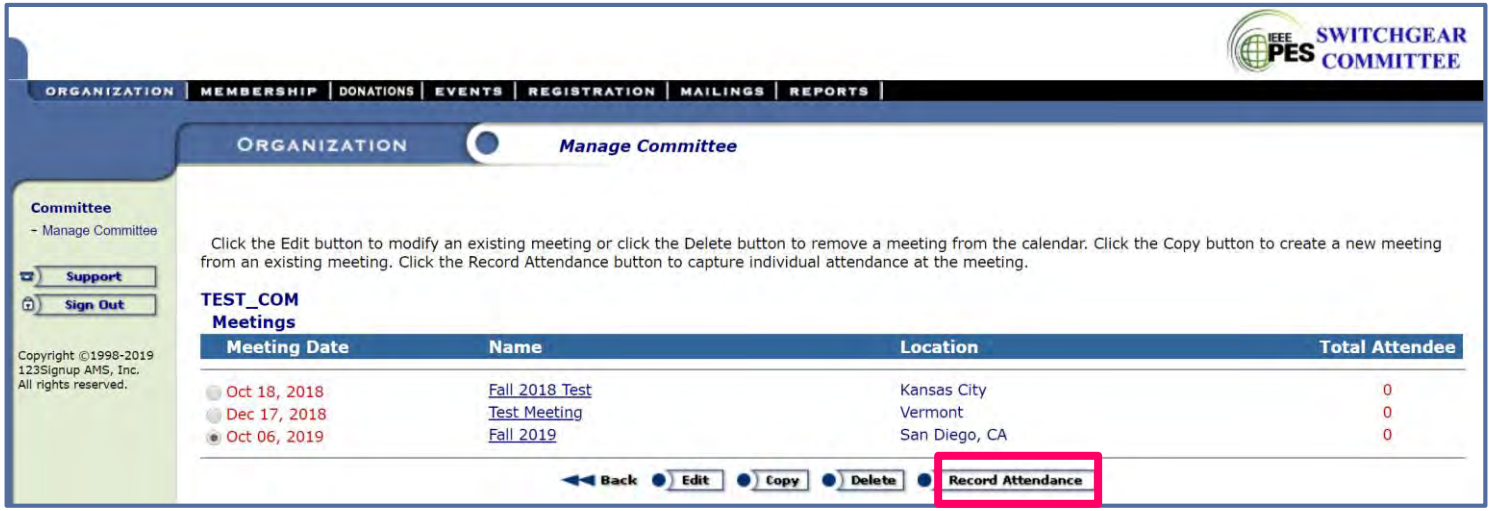
- Managing Committee - Assigning Roles



- By default, participants are added as "Guests"
- Assignment of Roles is a manual process

123Signup (AMS) – Officer's Training

- Managing Committee - Recording Attendance



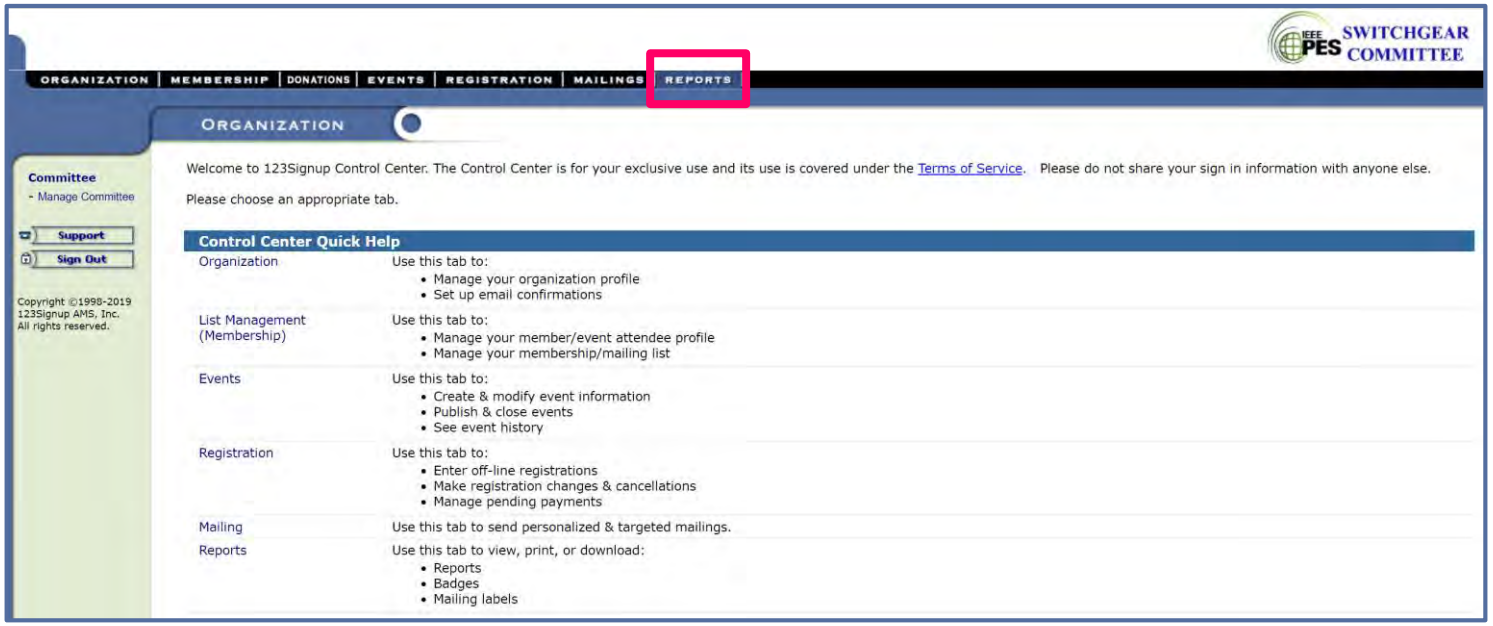
123Signup (AMS) – Officer's Training

- Managing Committee - Recording Attendance

1. Check box next to the name of the participants who attended
   - Participant must be added before attendance can be checked
2. Click Save
3. Click Done

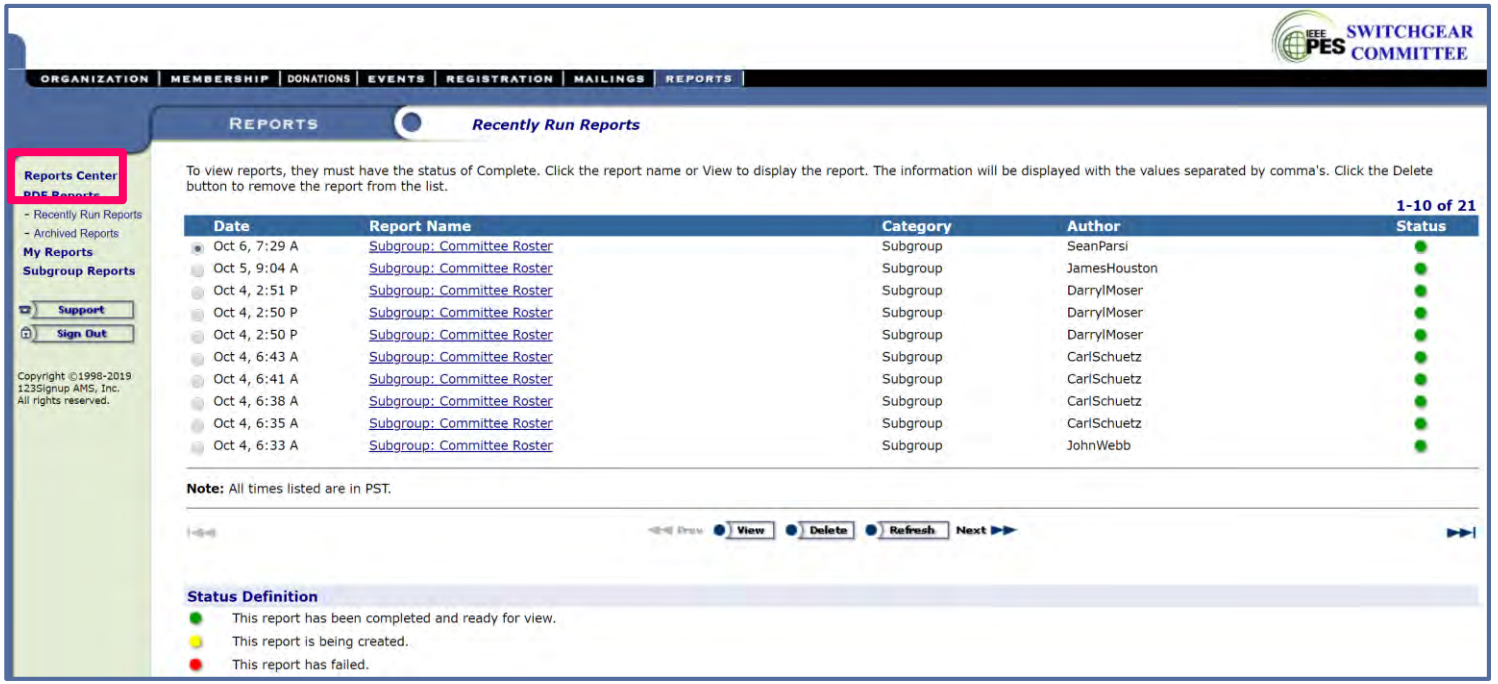
123Signup (AMS) – Officer's Training

- Reports - Committee Attendance & Meeting Roster



123Signup (AMS) – Officer's Training

- Reports - Committee Attendance & Meeting Roster

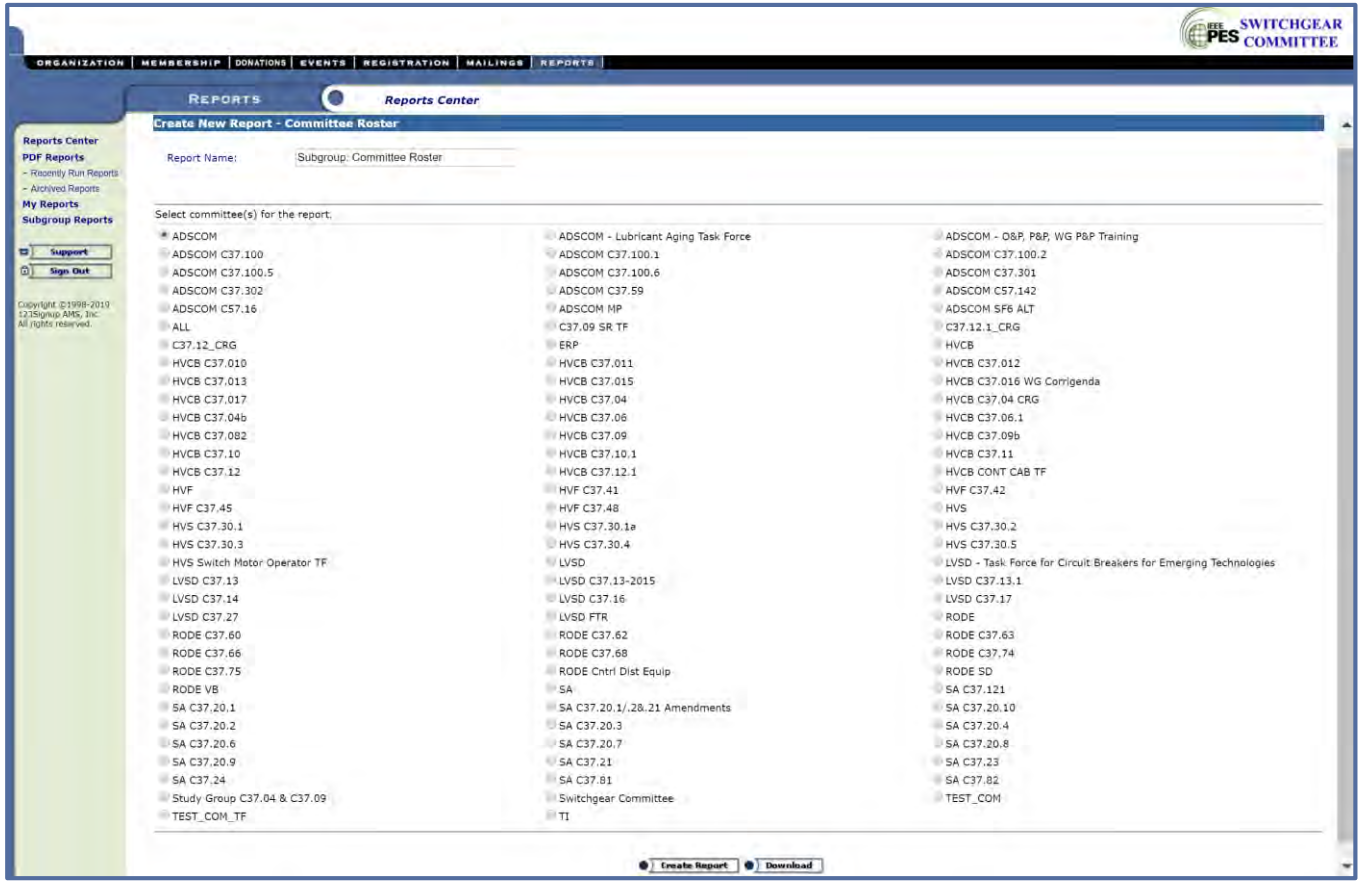


123Signup (AMS) – Officer's Training

- Reports - Committee Attendance & Meeting Roster

123Signup (AMS) – Officer's Training

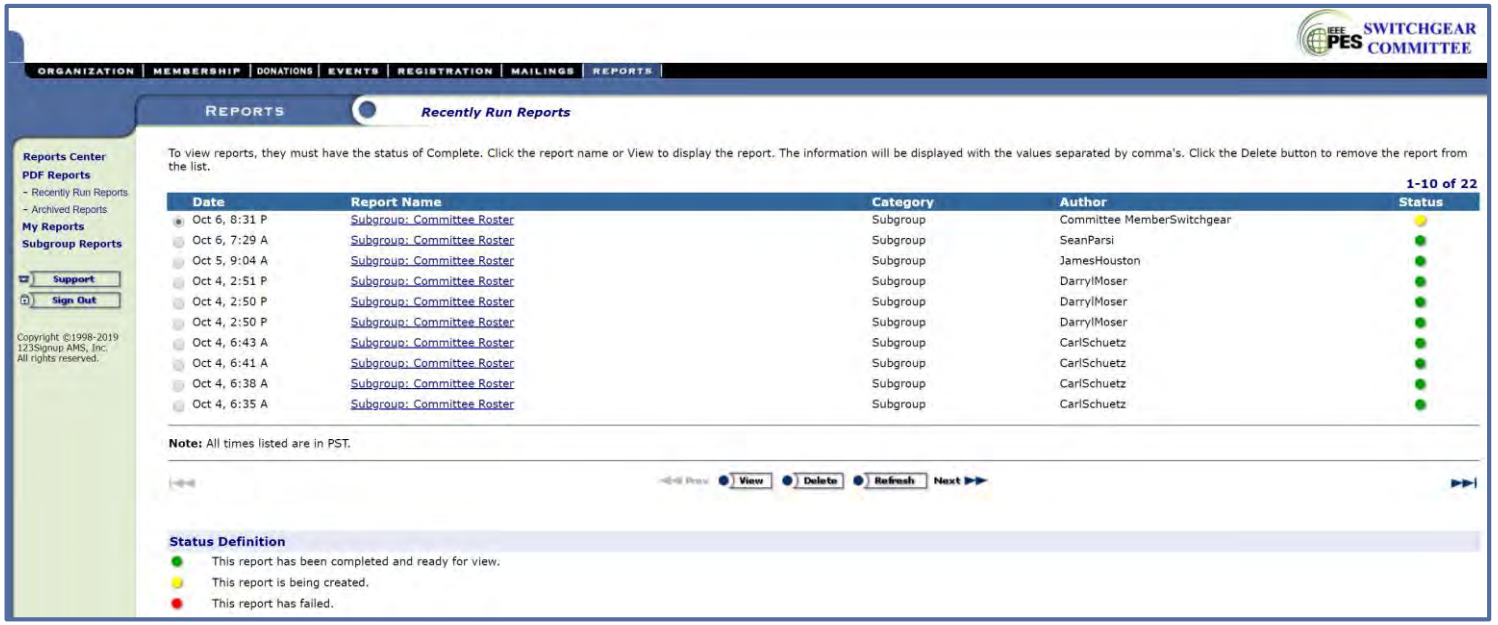
- Reports - Meeting Roster



Select Committee → Create Report

123Signup (AMS) – Officer's Training

- Reports - Meeting Roster



Click Refresh until Status turns green → View

123Signup (AMS) – Officer's Training

- Reports - Meeting Roster

IEEE PES Switchgear Committee

TEST_COM - Meeting Roster

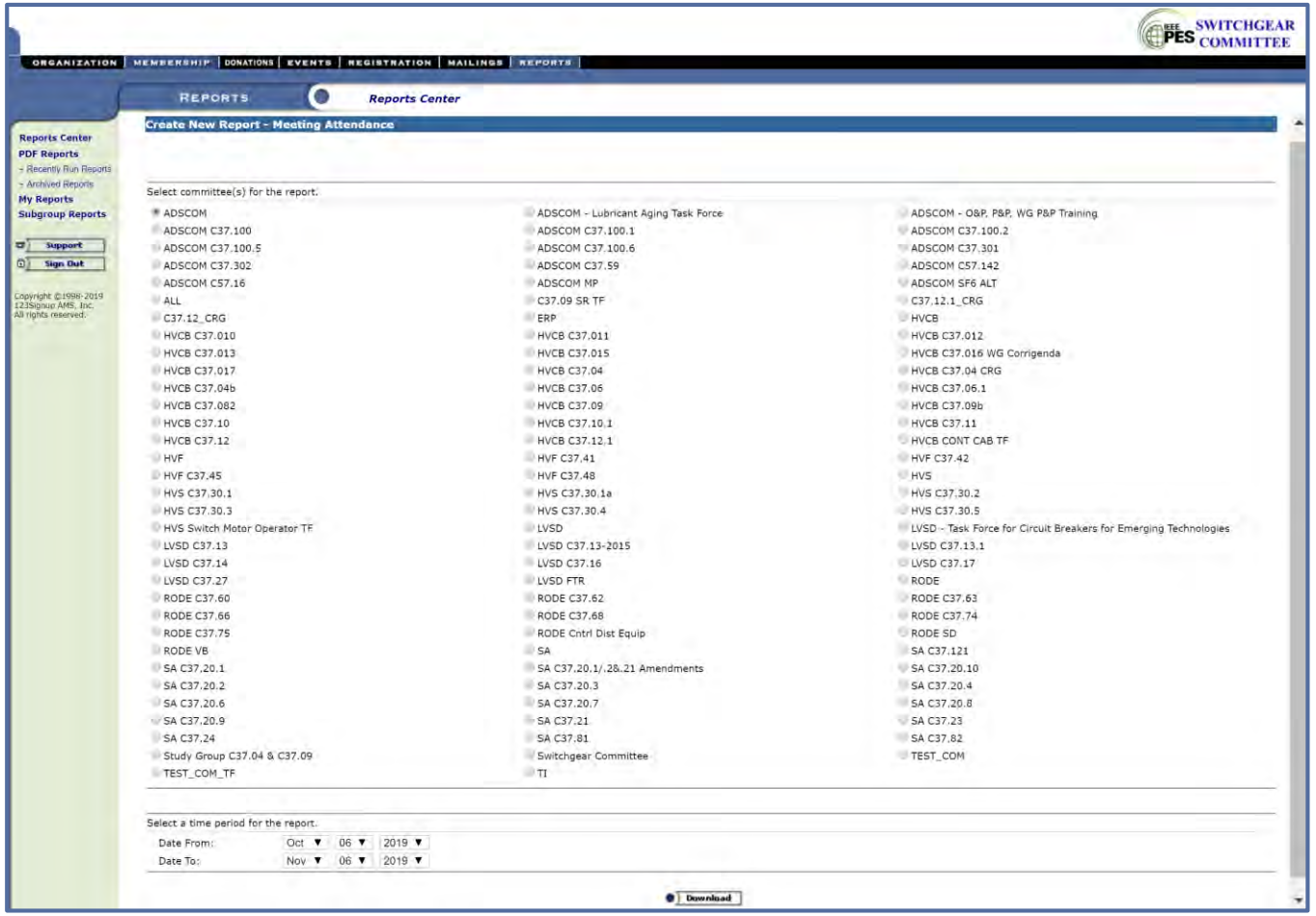
Place / Date of meeting : _____

Initial to denote attendance	Last name	First name	Company Name	Role	Request Member-ship
	Hensberger	Jeremy	Mitsubishi Electric Power Products Inc.	Guest	
	Trost	Karla	G&W Electric	Vice-Chair	

- Roster will <u>not</u> show terminated participants

123Signup (AMS) – Officer's Training

- Reports - Committee Attendance



Select Committee → Select Date Range → Download

123Signup (AMS) – Officer's Training

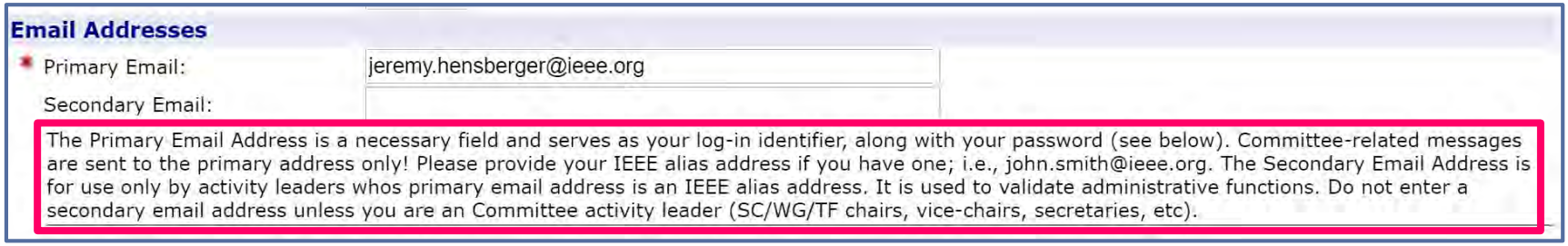
- Reports - Committee Attendance

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Subgroup Name	123Member ID	Membership Status	Role	Participation Status	Type	First Name	Last Name	Email	Company	City	State	Country	IEEE Member ID	10/18/2018	12/17/2018	10/6/2019
2	TEST_COM	2005279	Active	Guest	Terminated	Interested Individual	Anthony	Ricciuti	tricciuti@ieee.org	Eaton Corporation	Moon Township	PA	USA	Tony			
3	TEST_COM	2962799	Active	Member	Terminated	Member	Darryl	Moser	darryl.moser@us.abb.com	ABB	Wichita Falls	TX	USA	Darryl			
4	TEST_COM	3970943	Active	Guest	Terminated	Interested Individual	Terrance	Woodyard	mr.terrance.woodyard@ieee.org	Siemens Industry Inc.	Wendell	NC	USA	Terry			
5	TEST_COM	4202601	Active	Vice-Chair	Active	Interested Individual	Karla	Trost	ktrost@gwelec.com	G&W Electric	Bolingbrook	IL	USA	Karla			
6	TEST_COM	4421853	Active	Guest	Active	Interested Individual	Jeremy	Hensberger	jeremy.hensberger@meppi.com	Mitsubishi Electric Power Products Inc.	Warrendale	PA	USA	Jeremy			X
7	TEST_COM	4421853	Active	Chair	Terminated	Interested Individual	Jeremy	Hensberger	jeremy.hensberger@meppi.com	Mitsubishi Electric Power Products Inc.	Warrendale	PA	USA	Jeremy			X
8	TEST_COM	4509391	Active	Chair	Terminated	Interested Individual	William	Wilkie	eddiewilkie@eaton.com	Eaton	Arden	NC	USA	Eddie			

- Meeting Attendance <u>will</u> show terminated participants
  - Filter on Participation Status to remove terminated entries

123Signup (AMS) – Officer's Training

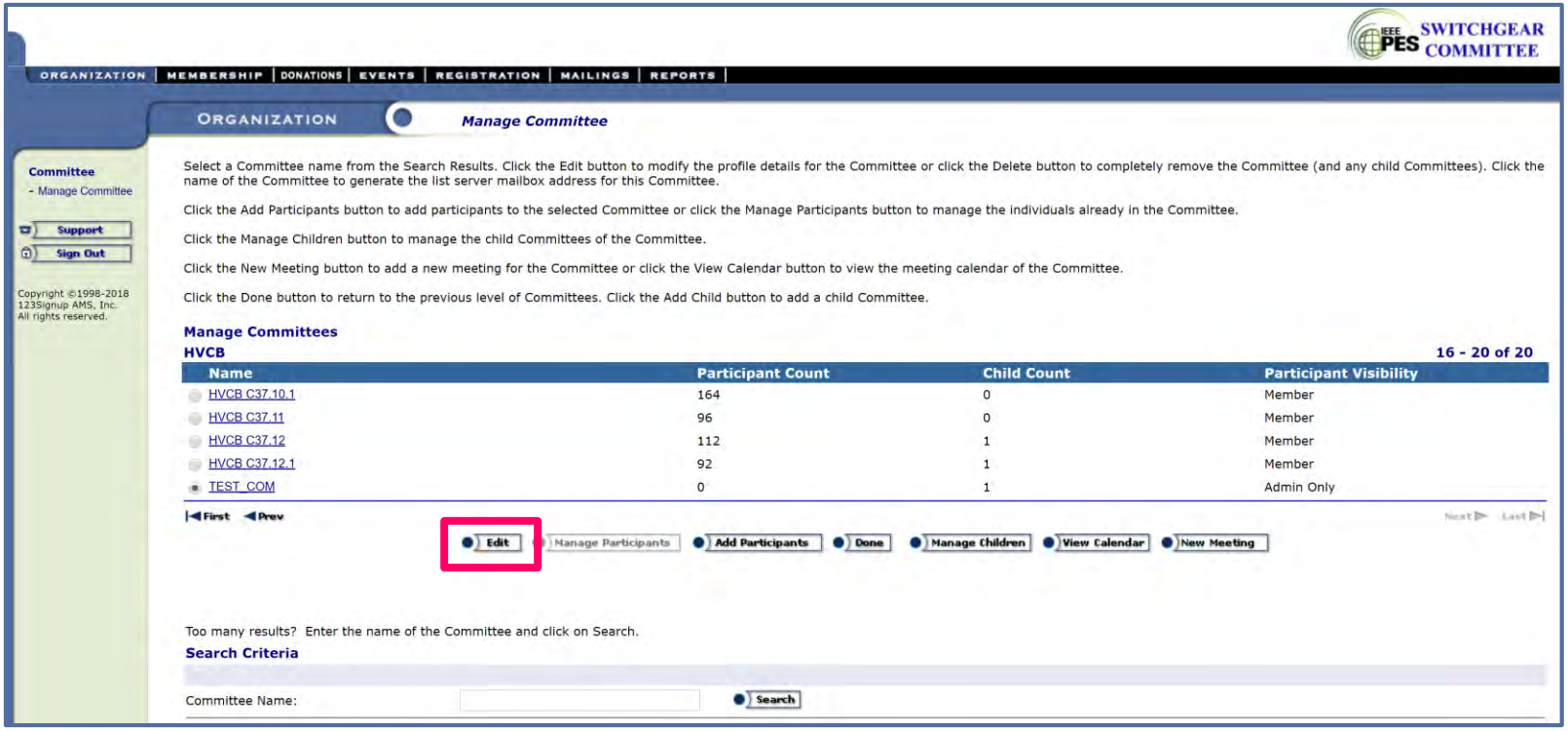
- Email Tools
  - IMPORTANT - CHECK YOUR PROFILE!
    - Your Primary or Secondary Email Address must match the email service you are using to send listserv emails.



  - Only Committee Officers can send emails via the Listserv
  - Email size limit is 2MB

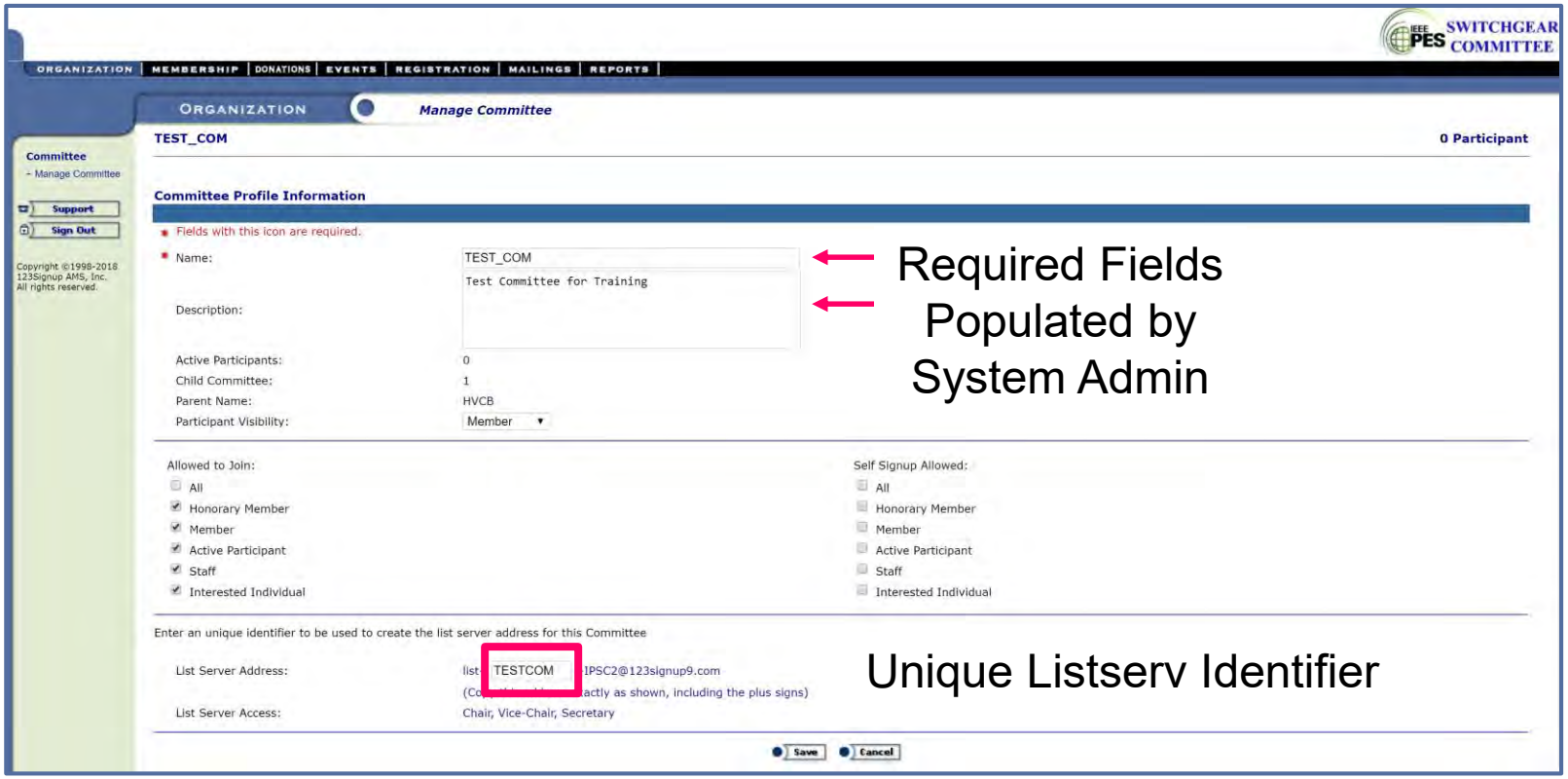
123Signup (AMS) – Officer's Training

- Email Tools- Setup (Completed by System Admin)



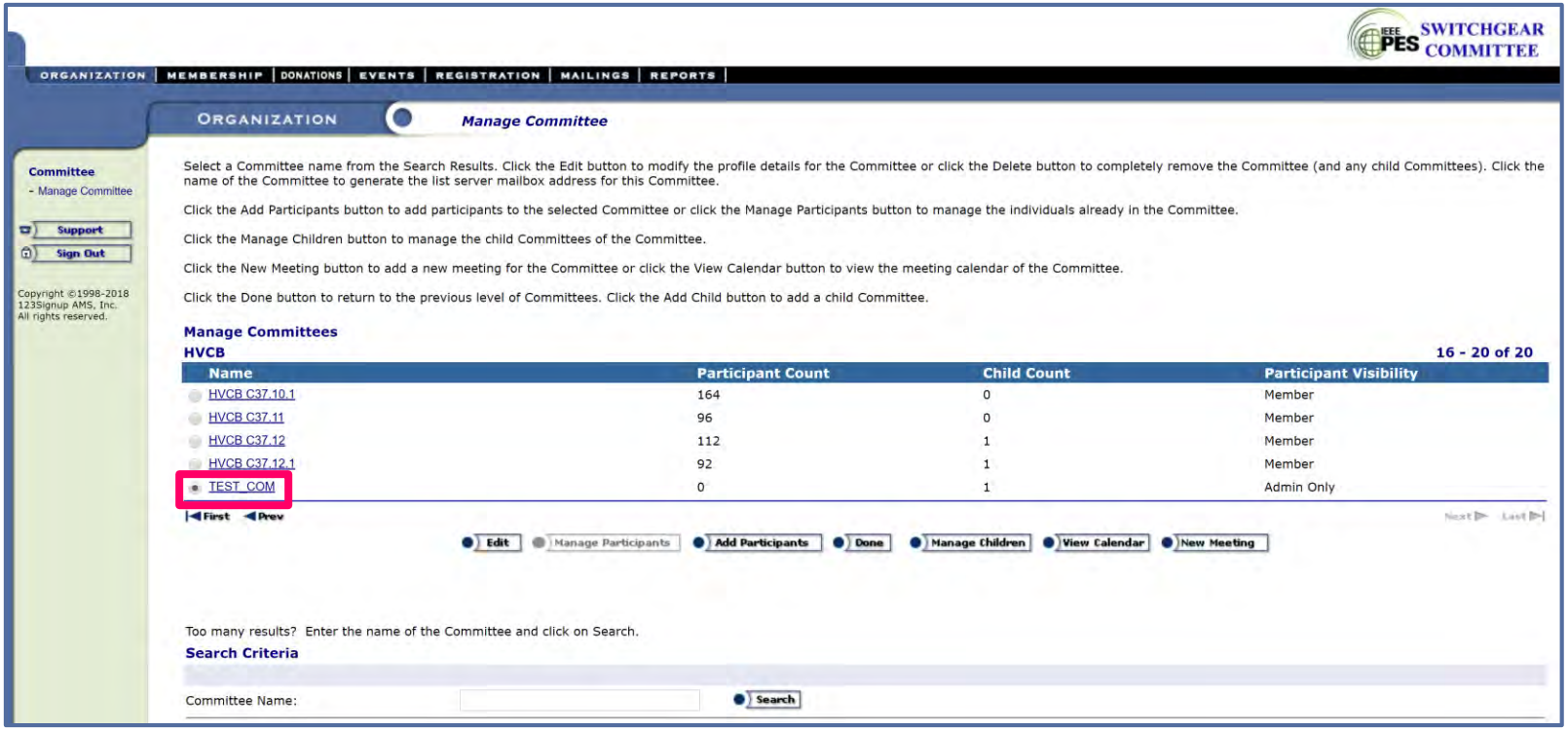
123Signup (AMS) – Officer's Training

- Email Tools - Setup (Completed by System Admin)



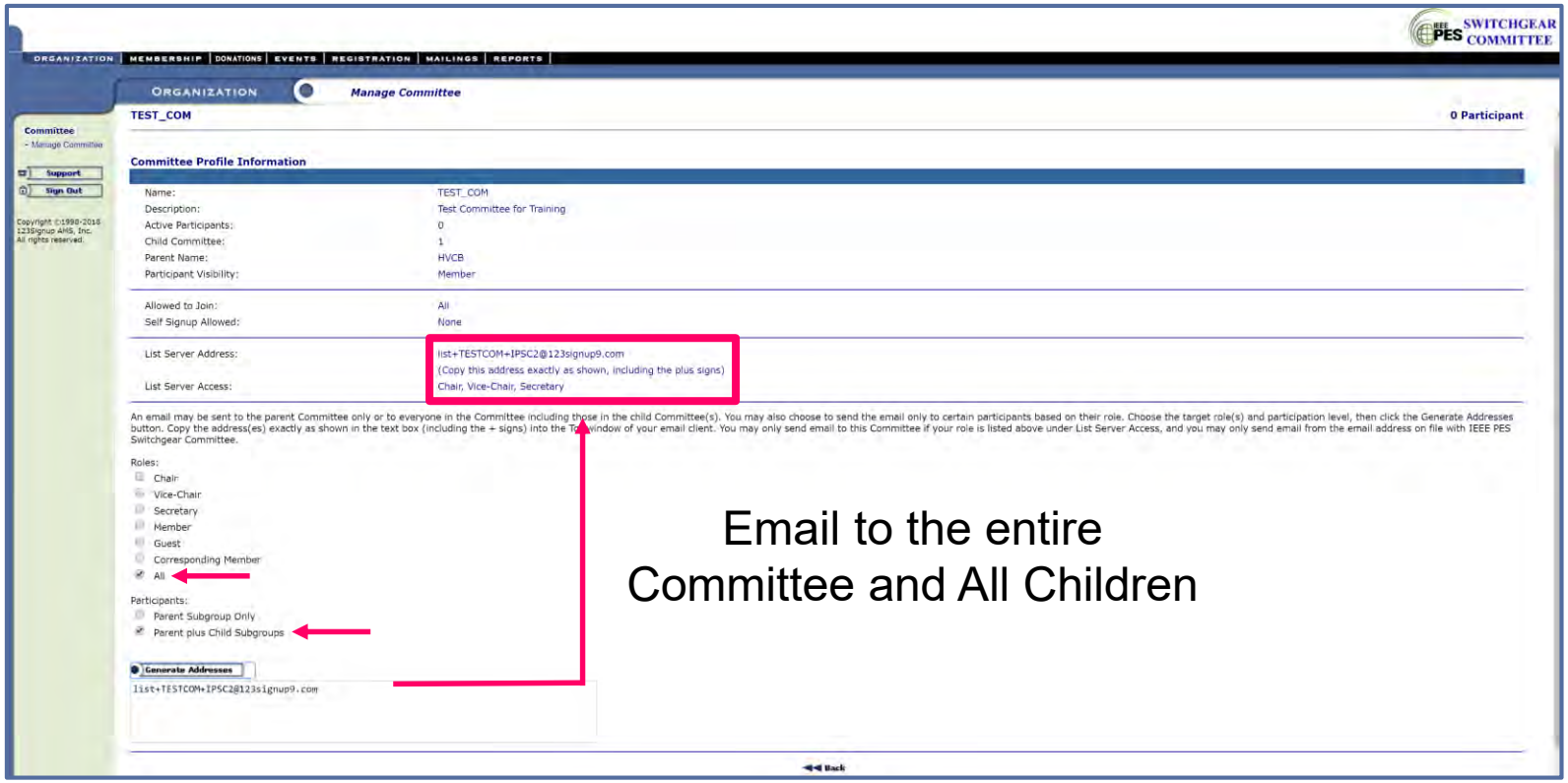
123Signup (AMS) – Officer's Training

- Email Tools - Generating Listserv Address



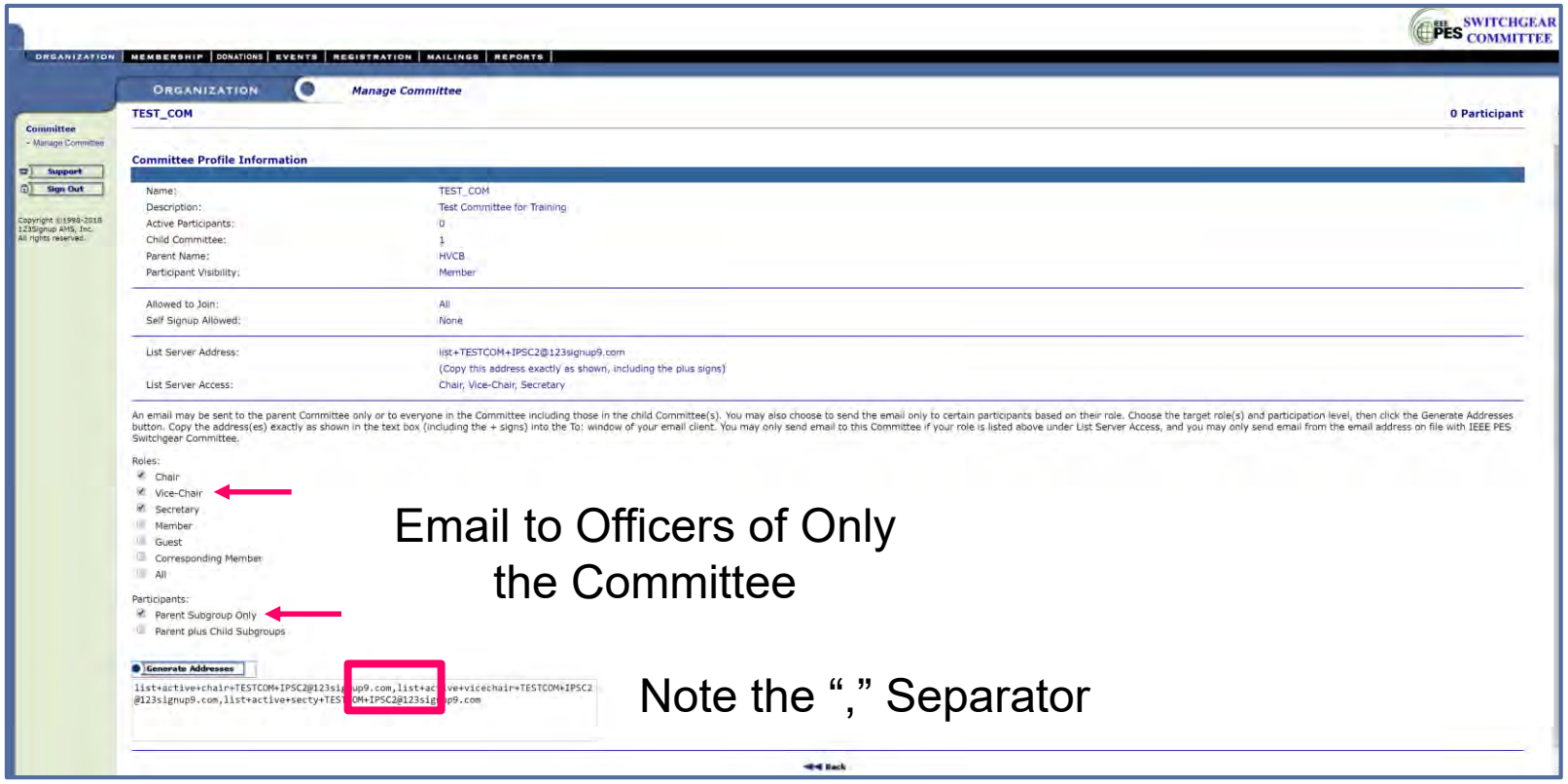
123Signup (AMS) – Officer's Training

- Email Tools - Generating Listserv Address



123Signup (AMS) – Officer's Training

- Email Tools - Generating Listserv Address



→ DEMO

123Signup (AMS) – Officer's Training