

QUICK GUIDE FOR SAMIEEE/Analytics

<http://www.ieee.org/samieee>

Key items on SAMIEEE Homepage are:

ACCESS SAMIEEE – This is your entrance to the database. (Before beginning, please read further.)

OnDEMAND training tool - This is a comprehensive training tool. Useful if you need more help than this QUICK GUIDE.

Note – before using tool, turn off web browser popup blocker.

HOW TO USE OnDEMAND - A one page guide on using the training tool. Print out before using the OnDEMAND tool.

REFERENCE MATERIALS - Link to information useful in building queries. Open link for a full list of available documentation.

Examples of available items include: List of all available information fields in SAMIEE; List of all Sections and Geocodes in IEEE by Region; List of Society Acronyms and Descriptions.

BEGIN USING SAMIEEE

Click on: Access SAMIEEE

View: “SAMIEEE – known issues” page (if page is not available, system will go straight to Sign In)

Click on: Access SAMIEEE

Sign in: Use your IEEE Web Account (User Name and Password)

(Note: If you cannot login, there could be two potential reasons. 1) You have used an incorrect username or password, or 2) you are not an authorized user. To verify your web account, go to: www.ieee.org/web/aboutus/help/task/my_account/web_account.html

CREATE A REPORT USING PREDEFINED QUERIES:

(It is suggested that Users start with the predefined queries while they become familiar with the tool.)

Left side of screen shows **My Folder** (personal folder for each user) and **Shared Folders**.

Under **Shared Folders** click on **SAMieee**

Click on **Geographic Predefined Queries** or **Society Predefined Queries** to open query list

Queries are prebuilt and named for the type of information retrieved.

Titles and query descriptions (if included) appear on the right side of screen.

How to run a PREDEFINED query (no modifications):

To run a query automatically, find a query name that suits your requirements from the available list. Click on the query name and it will automatically run. When completed it will return results based on your SAMIEEE access authorization. (Example: A Section Chair would only view results for their Section members.)

How to Edit/Modify a PREDEFINED QUERY setup BEFORE running the query:

To edit/modify the setup before running the query, find the query title that closely meets your requirements. Click on “**Modify Criteria**” link located below query title. Change/modify fields as necessary. *(Directions to select/modify fields follow under “Create/Modify a new query”.)* Once modified, click on Results Tab (located upper left side of screen) to run.

SAVE QUERY:

Click on **SAVE** Icon (Floppy Disk icon located on upper right hand screen – (Pointing on any Icon will give you a text description.) *Predefined Queries can ONLY be saved in your My Folder, so there is no danger of writing over the original queries.)*

The **Choose Folder** screen appears. Click on **My Folder** link (top left). This will change Folder name in field below.

Click in **Name** field: Type new name or modify name that shows.

Click in **Description** field: Type in detailed description of document, if desired.

Click on **OK** **(Note: If you do not see a SAVE icon, click on Modify and then save from this view.)**

SAVE OPTION saves the collection of data fields, but does “not” save the data. The next time you open this query, Analytics automatically refreshes and returns results with the most current information available. If you wish to retain the data for “historical” purposes, you must **DOWNLOAD** and save the completed query to a file.

DOWNLOAD RESULTS:

Click on **Download** link (scroll down to bottom of web page, located on lower left side of screen)

Pop-up appears with 3 choices.

Download to Excel (downloads to Excel Spreadsheet – (retrains special formatting)

Download Data (downloads to CSV file (tab delimited – flat file, no formatting retained)

Download Web Page (MHTML)

Select Download type

Select **OPEN** to download directly into open file.

Select **SAVE** to place into a closed file directly in a specified folder.

LOG OUT:

Click on Log Out link located on upper right hand corner.


CREATE/MODIFY A NEW QUERY:

Open SAMIEEE/Analytics

Click on “SAMIEEE – for Volunteers” located under **Subject Areas**.

This brings you to the working page/screen for building/modifying queries.

Left Side of screen (under **SAMIEEE – for Volunteers**) contains the catalog of fields.

Click on icon “+” in front of a folder title to expand or collapse a group  **Members and Affiliates**

Right Side of screen:

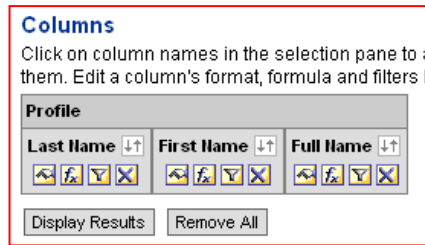
CRITERIA and **RESULTS** Tabs located top left screen.

CRITERIA tab is automatically opened in order to create your query.

RESULTS tab is selected when you are ready to run your query.

Columns – area where selected fields appear. (Appear in single line across screen.)

Filters – area where filters appear as built using the appropriate fields selected above.



Open required folder and/or subfolder on left.


Click once on field name – (field will be placed under Columns in single line across screen).

Continue to select fields as required for query. If required, the “X” icon located in the individual fields is the Delete Button.

Click on “X” to remove a field from your selection.

(A complete description of all folders and fields available in this tool is located on the SAMIEEE Homepage under Reference Materials, named “List of all available information in SAMIEEE.xls”)

To place Filter on Field:

Click the Add Filter icon on field (3rd icon in field box, appears as a funnel ).

Create/Edit Field window appears.

To manually type in Value:

Change **OPERATOR** as required for filter (drop down list)

OPERATOR box defaults to “is equal to/is in” but you may use the pull down menu for other options.

If you know the “exact” spelling and upper/lower view, type choice in Value field (located on left side of screen).

Click on OK

OR

To select Value using “LIST OF VALUES” for field:

If you do NOT know the exact value to be placed in the box, you can choose from a LOV (List of Values)

On right side of window, click on All Choices - full LOV available for that individual field will appear.

For some fields, the LOV selection will be excessive.

To LIMIT the list, select the dropdown list on Match field

Select: begins with, ends with, or contains

Type criteria in blank field next to Match.

(Example: Match: [begins with] A)

Click on All Choices

Limited LOV selection will appear.

Click on your selected value.

Choice will appear on left side in Value field.



To Run Query:

Click on Results Icon (upper right side of screen) **Results appear**.

Screen displays approximately 25 lines per page. To go to next screen or view all results, go to bottom of page and select appropriate button (green arrow buttons, center screen, will bring you to next screen or “all pages”).

For further assistance using SAMIEEE: Contact Helen Shiminsky, Information Processing Project Specialist, IEEE Member and Geographic Activities Department, 1 732 562 5517, or h.shiminsky@ieee.org

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