

Webex Participant Questions & Responses from Feb. 5, 2019

123Signup Sub-Committee/Working Group/Task Force Administrative Training Webinar

Presented by: Susan McNelly (Transformers Committee) & Joseph Gravelle (Substations Committee)

Hosted/moderated by: Shana Pepin (IEEE PES, Program Manager)





Link to recorded presentation for download:

<https://ieeewebex.com/ieeewebex/lr.php?RCID=20822b99e7ffcc588337dee52844d5f1>

1. **Question/Comment:** For attendance to be tracked, people need to be added. However, some may ask not to receive email. If I remove them from the group, their attendance record is also removed. I use the Corresponding Member to track those that are not members but want emails and those set as Guest are those that have attended at least one meeting but do not wish to continue receiving email. Users can check a box in their profile to allow emails or not, but that is for all groups, so it is not selective. This could be fixed with an added flag for each person in a working group. A dropdown could be added in the manage participants window.
 - a. **Question addressed during the end of the live webinar but, Susan McNelly clarifies here as well:**
Response from Susan McNelly: I would think that is should NOT be allowed for a group member to opt out of receiving emails. There may be business that needs to be conducted between physical in person meetings and to be a member of a group, it is that person's responsibility to participate in electronic ballots or other business. This would be OK for a guest, but not a member and if they are a member of another group, they would not be able to remove themselves from receiving email unless they wanted to be completely removed from the group itself.
2. **Question:** Should we urge people to back populate attendance? If the WG has been in existence for 2 years?
 - a. **Response from Shana Pepin:** The priority would be to get your active participants into 123Signup. If you do have the historical attendance that would certainly be very helpful and useful to have it all in one place.
3. **Question:** Is there a backup feature? I understand that only those set as an officer can edit, but any WG officer has access to users and attendance for all WGs within the committee. Whether intentional or not, it would be nice to revert to a previous state, if needed.
 - a. **Response from Susan McNelly:** I do not know. This would be a question for 123Signup.
 - b. **Response from Joe Gravelle:** I am not aware of a back-up available to users other than maybe contacting 123 support, and requesting specific information.

In regard to the administrative privileges, there are four levels of administrative privileges in 123 Signup. (See below). I believe Sue was demonstrating the blue level (Admin with committee-only access). However, these administrative privileges are only applicable to the technical committee database that you are a member of.

Status Definition

-  Admin with full access
-  Admin with committee-only access
-  Admin with read-only access
-  Admin with mobile-only access

4. **Question:** Once you disband a working group, can you archive the records of participants and attendance? OR, are they deleted?

- a. **Response from Shana:** We'll definitely ask Sue & Joe at the conclusion of the presentation. My guess is that you would need to just label the disbanded working group as "Disbanded" or something of that nature to indicate it is no longer active within your committee. While you could delete it, I would say for historical purposes, we would not want to do that.
 - b. **Response from Susan McNelly:** I believe that you can just make the group inactive (top level administration would do this) and then you can reactivate it later for a new revision and just clear out all of the members at that time as a starting point or make everyone a guest until after the first meeting. Otherwise, you just leave them as inactive and the history is there if needed, but this may be a good question for 123signup.
 - c. **Response from Joe Gravelle:** I am not familiar with this situation, but I agree that the group should not be deleted. I would tag it inactive WG.
5. **Question/Comment:** Switchgear uses this Attendance report - we Copy & Paste from this to paste attendance into minutes.
- a. **Response from Susan McNelly:** Should not be an issue as long as only name and affiliation are copied in.
 - b. **Response from Joe Gravelle:** As long as the report does not have contact information and only name and affiliation are copied you should be OK.
6. **Question:** If you save the roster on your local PC do you remain GDPR compliant?
- a. **Response from webex participant:** Some of the reports include email & tel - So not GDPR compliant. Some reports do not include - so YES GPDR compliant. Switchgear, setup entry page where attendee provides Opt In acceptance for sharing Email & Telephone - That is, it is allowed.
 - b. **Response from Shana Pepin:** Thank you for that response related to GDPR (above). To follow-up from IEEE perspective, you are able to save the roster to your PC if you need to use it for business related to the working group or committee but, you cannot use that contact information to send emails that are not business related and you cannot share personal data with other members of the working group or otherwise.

You can find more on the IEEE Privacy Policies online here: <https://www.ieee.org/security-privacy.html>

7. **Question:** You cannot adjust the report to say what data you want in the report?
- a. **Response from Susan McNelly:** No, for the Create Report option, they are canned reports. The Committee Administrator can request revision to reports and depending on what has been agreed to by IEEE for this new contract. For the download report, you can manipulate what you receive to create your own, but would not be able to get additional information unless the overall administrator requested it.
 - b. **Response from Joe Gravelle:** You can request 123 support to modify the report to meet your needs. They are typically very helpful.
8. **Question:** It is my understanding that each committee will have its own user database. How will this work at meetings like JTCM or PES GM, where there is high potential for attendees from other committees? Will they have to register and maintain contact information for every committee?
- a. **Response from Shana Pepin:** Yes, if you need to record attendance for someone at your particular meeting they would need to be in your committee's roster in some capacity, likely as a guest. We can discuss this with 123Signup directly to confirm though.
 - b. **Response from Susan McNelly:** Agree, these are presently all separate databases of participants.
9. **Question:** You can only have one role. Right? If I am chair, I am not member. Please clarify.

- a. **Response from Shana Pepin:** With regard to your role(s), within that particular committee so, PSRC Committee for example, yes, you can only have one role as the "secretary" and then drilling down to the working group level, if you are the "chair" of that working group, you should be able to indicate your role in that particular group. So, one role per group. We can confirm this with 123Signup.
 - b. **Response from Susan McNelly:** Correct, one role per group. So each SC, WG or TF is considered a separate group, so you can have multiple roles across all of the groups you participate in, but only one role for each group.
 - c. **Response from Joe Gravelle:** You can have only one role as a member of a committee/ WG or Task force, but they can be different roles as applicable.
For example, I am the chair of one working group, a member of several others, and a guest at several others. I am also the chair of the B0 (administrative subcommittee). Thus, you can have several roles but only one role per WG or subcommittee.
10. **Question/Comment:** Want to confirm - When setting up ListServ email, if you select Member, email will go to Chair, Vice Chair, and Secretary automatically.
- a. **Response from webex participant:** It only sends to those set as Member.
 - b. **Response from webex participant:** I make a group in Outlook that uses them all.
 - c. **Response from Susan McNelly:** I did a test and you are correct, I have assumed incorrectly that Members included the officers. If you want the Chair, Vice-Chair and Secretary to receive the email, you will need to check all of those boxes as well as the Members to send to all members. If you select the box for "All" it will go to everyone, including the guests with just one distribution list server address.
 - d. **Response from Joe Gravelle:** If you select member the email will only go to the people in the group with the role member. It will not go to the chair, Vice Chair, secretary etc.
11. **Question/Comment:** The attachment file size is some odd number just above 2 MB
12. **Question:** Does Transformers or Substation have a WG Administrator instruction document already?
- a. **Response from Susan McNelly:** I am not sure what the question is. Is this an overall administrator instruction or just for a WG? I believe we have some overall instructions for the overall administrator, but not sure about at the WG level.
 - b. **Response from Joe Gravelle:** The Substations Committee has a word document with guidance for users, but it probably could use an update.
13. **Question:** If member status (in group) changes, e.g. from Guest to Member, how is the person's membership status reported in previous meetings? Does it remain as their status at that meeting or does it change for all meetings although membership status changed at a specific date?
- a. **Response from Joe Gravelle:** The role of the attendees are not recorded. From WG P&P documents, the important issue is the actual attendance record not the role that the attendee had during attendance.
 - b. **Response from Susan McNelly:** I believe that you would see two lines for that person on the attendance report. One for meetings where their role was Guest and one for their role as Member, but I am not certain of this. Again, this is why it may also be important to have the name, affiliation and role in the minutes. I didn't mention the role part, but normally you need to somehow indicate of those in attendance which were members or only list members since that is the critical item to record. [I disagree with Joe's response here.](#) It is important to know **who is a member** and attended a meeting. The guests, not so much.
14. **Question/Comment:** It was my understanding that you had to create a profile before you can register for a meeting.
- a. **Response from Shana Pepin:** Yes, that is correct.

- b. **Follow-up question:** So, how can you accidentally create a new entry by registering?
- c. **Response from Shana Pepin:** If you use a new email address and create a new account
- d. **Response from Joe Gravelle:** If you register for a meeting event with 123 with a different email, you will have two profiles in 123 with the same name. Our old membership reports included the email and name (prior to the GDPR issue). Thus the member was added to the WG with new email and when looking at attendance report, it was not noticed that one profile was listed as terminated and one as member. This may not be a big issue with the GDPR removing contact information from membership roster used for attendance.
- e. **Response from Susan McNelly:** Correct, to register, you first need to create a profile. It is important to note that you want to make sure that you are not registering under a different email than previously used. You should update your profile to show your current information, not creating a new one because an email or job changed. I disagree with Joe's comment. This will ALWAYS be a problem if there are duplicate profiles created. My understanding from the person on our group is that it is not an easy fix, but I have never personally had to fix it.