

IEEE Privacy Policy Consent Collection

- Website and Email Campaign Instructions -

Introduction - To address global personal privacy concerns, IEEE has adopted a proactive approach when obtaining consent to the IEEE Privacy Policy as the basis for communicating with individuals. Request consent whenever asking someone to provide personal information (e.g. name, email, physical address, etc.)

IEEE has developed a methodology to facilitate the consistent capture and management of these records within the IEEE Consent Management System. The user will click on a banner on a website or a link in an email campaign, and will sign in with an IEEE Account. [If they do not have an IEEE Account, there is a simple two-step opt-in process to verify that they are the owner of the email address submitted and collect consent.]

IEEE organization units (OUs), such as Chapters, Regions, Sections, Societies, Technical Councils or Technical Communities are encouraged to request that individuals provide consent to the IEEE Privacy Policy. When requesting personal contact information on an OU website or within and email campaign, a consent request should be included. On webpages, this request should be in close proximity to input forms.

Instructions are available for implementing capture on websites or within email campaigns.

Topics:

1. Website Setup Instructions
2. Requesting Captcha Use for Websites
3. Website User Experience
4. Questions or Need Help?
5. Email Campaign Instructions
6. Email campaign user Experience
7. Campaign Instructions for Commonly Used Service Providers

1. Website Setup Instructions

Follow the steps listed below to add the banner to your website:

Include the code snippet located in the file found at:

https://docs.google.com/document/d/1VJMdzd_M8irqrGlVj4rL-BaMYrV5IPnA-Z5nLI5EH8/edit?usp=sharing before the closing <body> tag of the page where the consent form will reside.

Invoke the following function to present the popup to the user:

```
ieeePreferenceCenterCP.showPrefInfo(<consents>,<subscriptions>,<OU Name>,<Return web site URL>,<URL of the OU Logo>);
```

HTML and Javascript example:

Invoke with onClick event handler :

```
<a href="#" onClick="ieeePreferenceCenterCP.showPrefInfo(<consents>,<subscriptions>,<OU Name>,<Return web site URL>,<URL of the OU Logo>)">Link text</a>
```

Javascript:

```
// create a link or HTML element with ID
```

```
<a href="#" id="invokeConsentScript">Link Text</a>
```

```
// get the element by ID
```

```
var el = document.getElementById('invokeConsentScript');
```

```
// attach a click event to this element that calls the preference center function
```

```
el.onclick = function(){ieeePreferenceCenterCP.showPrefInfo(<consents>,<subscriptions>,<OU Name>,<Return web site URL>,<URL of the OU Logo>)}
```

The specifications of the parameters are:

<consents> - The first parameter is a comma-delimited list of consent codes from the CMS / IEEE Consent Management System, applicable to the web site in question.

To pass an empty parameter use "".

<subscriptions> - The second parameter should be left empty. To pass an empty parameter use "".

<OU Name> - The third parameter is the name of the IEEE Organizational Unit (OU) [Society, Technical Community, Geographic Unit etc.] the web site belongs to.

To pass an empty parameter use "".

If this parameter is not provided "IEEE" will be displayed in the initial form, email to the user, and preference center.

<Return web site URL> - The fourth parameter is the URL of the website or specific page the user will be redirected to after submitting their preferences.

To pass an empty parameter use "".

- If this parameter is not provided the user will be returned to IEEE.org after submitting their preferences.

<URL of the OU Logo> - The fifth parameter is the URL of the OU image/logo.

To pass an empty parameter use "".

- If this parameter is not provided no image will be displayed in the email to the user.

At least one of parameters #1 and #2 must be specified. Parameter #'s 3, 4 and 5 are optional.
(At this time, it is recommended that #3 and #5 not be specified)

A few examples:

```
ieeePreferenceCenterCP.showPrefInfo(" 'ta_cis011_gm_optin','TA  
Society','https://www.example.com/path/to/return-page','");
```

```
ieeePreferenceCenterCP.showPrefInfo('ieee_privacy_policy,ieee_event_tos',  
'ta_cis011_gm_optin','IEEE Computational Intelligence  
Society','https://www.example.com/path/to/return-page','");
```

2. Requesting Captcha Use

IEEE has instituted the use of Captcha (a type of challenge–response test) on websites to determine whether the user is human and reduce robotic activity. When IEEE Privacy Consent Collection is placed on a website, Captcha must be implemented. To request Captcha use, follow the Instructions based on your IEEE role.

IEEE Members and Volunteers - Visit the [IEEE Support Center](#) and Submit a Question or conduct a Live Chat with an associate requesting Captcha Use. You will receive a Reference Number for your Captcha Use Request.

Provide the address(es) of the web site(s) in question. Please allow approximately 48 hours to contact upon completion.

IEEE Staff - Create an [IEEE HelpDesk](#) service request for the application "*Preference Portal*" to allow the use of Captcha in the web site in question. The instructions for creating the request can be found [here](#).

A single request can be submitted for multiple websites.

Web Addresses - The address of each web site in question has to be specified in the following format - <protocol>://<website domain>.

Following are some examples:

<https://www.ieee.org>

<https://www.standards.ieee.org>

<https://www.computer.org>

Email - Captcha is not needed for email campaigns since user interactions begin within his/her email and there is no chance of a robotic activity.

3. Website User Experience (OU name not displayed)

The sequence of screenshots below reflects the user experience from clicking on a website through confirming communication preferences and policies.

Example: `ieeePreferenceCenterCP.showPrefInfo(", 'ta_cis011_gm_optin',", 'https://www.example.com/path/to/return-page',");`


a. Information entry form, Organization Unit (OU name not displayed)

If you would like to receive information about products, services and events, please provide the information below.

First Name:

Last Name:

Email:

I'm not a robot  reCAPTCHA
Privacy - Terms

b. Submission confirmation, Organization Unit (OU name not displayed)

Thank You!

You have been sent an email requesting confirmation of your interest in receiving information. Please click the link in your email to complete the process.

c. Confirmation / verification email, Organization Unit (OU name not displayed)

IEEE Confirmation <noreply@ieee.org>
to me

12:55 PM (0 minutes ago)

31 Jan 2019

Instructions for managing your IEEE communication preferences

We received your recent request for information. To complete your request, please click "Manage Preferences" to view and update your preferences in the Communication Preferences and Policies portal. [This link will expire 3 hours from time of receipt.](#)

If you need assistance, visit the IEEE Support Center where you can access the FAQs, submit a question, and chat or talk with one of our professional support staff. Please note that replies to this message do not reach IEEE.

d. IEEE Privacy Portal, Organization Unit (OU name not displayed)

Settings

- Personalize your IEEE experience
 - Personal Profile
 - Communication Preferences and Policies**
 - Professional and Education Information
 - Technical and Other Interest Profile
 - Manage your IEEE Account
 - Email Address and Password
 - Address Information
 - Manage your IEEE purchase information
 - Order History
 - Payment Options
 - Memberships and Subscriptions Catalog
 - Access IEEE Purchases
 - My Courses
 - Help and Support
 - IEEE Support Center
 - Contact IEEE

Communication Preferences and Policies ⓘ

To respect your privacy and to better serve you, please select the manner in which IEEE can contact you.

Accepted Policies & Terms

Collapse all

IEEE Privacy Policy accepted on 09/19/2019 at 11:44:35 a.m. EDT

Communication Preferences

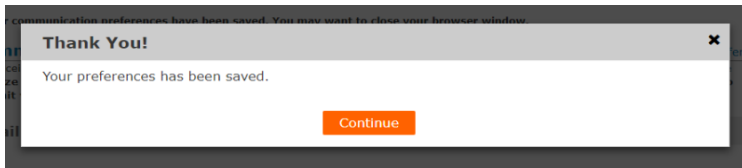
Collapse all | Check all | Uncheck all

I would like to receive information about additional IEEE products, services, and events

Collapse all | Check all | Uncheck all

Please remove me from IEEE communications not required legally or for the fulfillment of services. ⓘ

e. Confirmation / Thank you message Organization Unit (OU name not displayed)



4. Questions or Need Help?

IEEE Members and Volunteers - If you are having trouble in using these instructions please visit the [IEEE Support Center](#) and Submit a Question or conduct a Live Chat with an associate.

Describe the problem, noting that it is related to the application "**Preference Portal.**" You will receive a Reference Number for your service request.

IEEE Staff - If you are experiencing any difficulty using these instructions, please submit an [IEEE Help Desk](#) ticket. Describe the problem and note that it is related to the application "**Preference Portal.**" The request will be routed to the appropriate person to provide the assistance needed.

Email Campaign Setup

IEEE OUs may have lists of non-member individuals that they communicate with regarding a specific activity (such as a conference, education program, or webinar series). Some of these individuals may be interested in learning more about additional topics.

Including a link to the IEEE Privacy Policy within an email communication, can make the process simple and efficient.

Example: **YES, I would like to receive information and updates about IEEE events, products and services.**

5. Email Campaign Instructions

To capture IEEE Privacy Policy consent a URL in the following format must be embedded in email campaigns to initiate the process:

- <https://www.ieee.org/ieee-privacyportal/app/managePreferencesByEmail?firstName=<First Name>&lastName=<Last Name>&email=<E-mail Address>&societyName=<OU Name>&societyUrl=<Return web site address>&sub=<To pass an empty parameter use '>&con=<Comma-delimited list of consents>>

- The values in **blue** should be personalized for each user targeted by the campaign.
- The values in **red** should be customized for each campaign.
 - Return website address = the website you want users sent after completing the submission
 - Comma-delimited list of subscriptions - Leave empty**
 - Comma-delimited list of consents - Unique**

Notes:

1. **firstName**, **lastName** and **email** are required parameters
2. **societyName** and **societyURL** are optional. (At this time, it is recommended that **societyName** and **societyURL** not be specified)
 - o If **societyURL** is not assigned a value, upon saving the preferences, the user is redirected to the main IEEE web site (www.ieee.org)
3. At least **sub** or **con** is required, both are allowable.

6. User Experience after clicking on a campaign URL

a. Information entry form, with Captcha challenge

The screenshot shows a web form titled "Information entry form, with Captcha challenge". The form has a blue header bar with a close button (X). The main content area is white and contains the following elements:

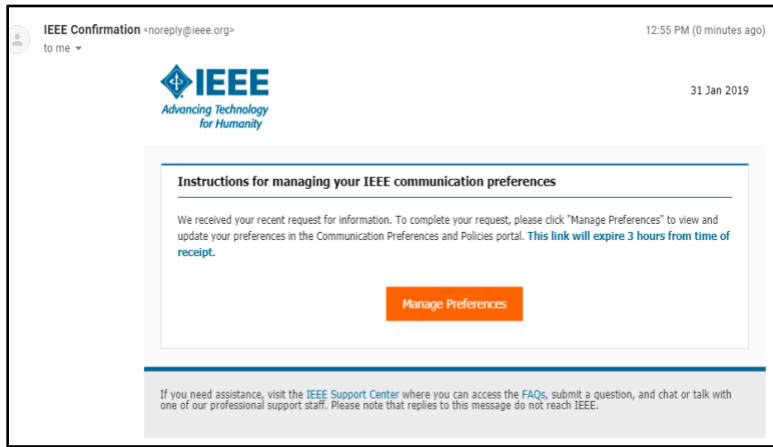
- A heading: "If you would like to receive information about products, services and events, please provide the information below."
- Three input fields: "First Name:", "Last Name:", and "Email:", each with a corresponding text input box.
- A checkbox labeled "I'm not a robot" next to a reCAPTCHA logo and the text "reCAPTCHA Privacy - Terms".
- Two buttons at the bottom: a white "Cancel" button and an orange "Submit" button.

b. Submission confirmation screen

The screenshot shows a submission confirmation screen with a blue header bar and a close button (X). The main content area is white and contains:

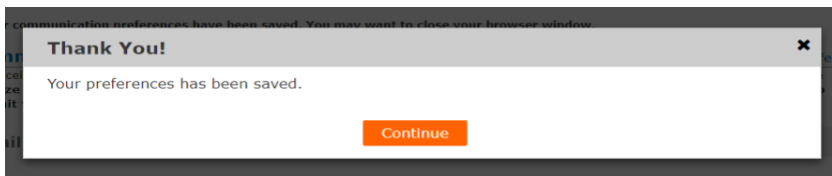
- A heading: "Thank You!"
- A paragraph: "You have been sent an email requesting confirmation of your interest in receiving information. Please click the link in your email to complete the process."
- A single orange button labeled "Ok" centered at the bottom.

c. Confirmation / Verification Email



d. IEEE Privacy Portal - Communication Preferences and Policies

e. Confirmation / Thank you message:



7. Campaign Instructions for Commonly Used Service Providers

Documentation on how to add dynamic content, relevant to populating the firstName, lastName, email in the privacy portal link.

For assistance or technical help with email campaigns, please contact your service provider.

ConstantContact

<https://developer.constantcontact.com/docs/developer-guides/custom-content.html>

Higher Logic

<https://support.higherlogic.com/Content/IWantTo/Products/Optional/MA/Enterprise/Messages/DynamicContent.htm?Highlight=adding%20dynamic%20content>

MailChimp

<https://mailchimp.com/help/all-the-merge-tags-cheat-sheet/#Personalization>