

From: Amber Nguyen, WSDOT
To: ETCs who are using the electronic CTR survey
Subject: Testing your site's setup

I have set up the electronic survey to allow its use at the site(s) you have requested through your jurisdiction representative. Your jurisdiction representative will send you the special e-mail address and password that you will use to log on as ETC and use the ETC tools during your survey. When you receive this information, please go to

<https://www.ctrsurvey.org/newtool/etctool.aspx>

and login to the site using that special e-mail address to make certain that it works. The password you receive is not case-sensitive.

Once you have logged in, the system will take you to the "survey details" page. Please check to make certain that the worksite name(s) is/are entered correctly, recalling again that these are the names that employees at those sites use to identify them. Your jurisdiction representative will notify you if I have had to modify the name you have given me because it is too long or because it conflicts with your employer's other sites using the electronic survey in other counties.

The next steps depend on how you plan to allow employees to access the online survey:

If you have decided to allow access to the survey by all e-mail addresses in specific domains (such as AnyEmployee@OurCompany.com) please check that the list of e-mail domains listed in the survey profile is complete and that each domain is spelled correctly. On occasion, I have received, and set up, fewer domain names than intended, or domain names that contained typographical errors. Once you have checked the domains, please go to section B below.

If you have informed your jurisdiction that you plan to upload a list of employees to survey, instead of allowing access by domain, then confirm that the list of e-mail domains is empty (unless you are also allowing access by e-mail domain). To proceed with testing the survey, you will need to upload your e-mail address into the system so that you can access and test the survey. Section A below describes how to do this for just your address. Then, logout and go to section B to complete your test. Section C contains directions for uploading a whole file of e-mail addresses, once you have completed your testing.

Section A (if you plan to allow access only to e-mail addresses that you upload)
To upload a single email address for testing, open a blank Excel spreadsheet. In column A, enter your email address. In column B, enter your worksite name. This name must match the worksite name you gave your jurisdiction. There should be no field names or headers in the spreadsheet. Save the file to your desktop. In the ETC tools select the link in the right-hand column which says "Upload list of email". On the next screen select the "browse" option to locate the Excel spreadsheet that you have saved to your desktop.

When your file name appears in the field, click “Upload.list”. A box will pop up showing your email address. Click “Continue” and on the next screen select the “Append email addresses to sample”. Log out and go to section B to complete your test.

Section B (if you plan to allow access by domain or if you plan to allow access only to addresses on a list and have uploaded one for testing)

Access the survey as your employees will, at

<https://www.ctrsurvey.org/>

using your regular e-mail address for your site (or for one of your sites), or the one that you uploaded in section A. Go to the survey itself, and take the survey as though you were filling it out as an employee. When you get to the end please verify that the end of the form matches the paper version of the form being used in your county (you received a paper copy at the survey training conducted by your county representative). The transit question varies by county, and you need to verify that your employees will see the correct form. If your site is in Whatcom, Yakima, or Spokane Counties, you should not see the transit question.

Please do this for each of your sites if you have more than one site using the online survey.

When you have completed this, you are done checking. You may want to explore the ETC tools and perhaps delete the name(s) that you used to do these tests.

If you encounter any difficulties or errors in your setup, please contact your jurisdiction representative.

Section C (uploading a file of e-mail addresses)

If you have decided to upload a file of e-mail addresses into the survey system, and to allow only persons on that list to survey, here is how to do the upload.

First, you will need to prepare the list in either Excel or “comma delimited file” (*.csv). Before you upload the file, please check it for duplicates and make sure that each e-mail address appears only once.

The file has 4 fields, which must appear in the following order, WITHOUT field names or headers at the top of the file.

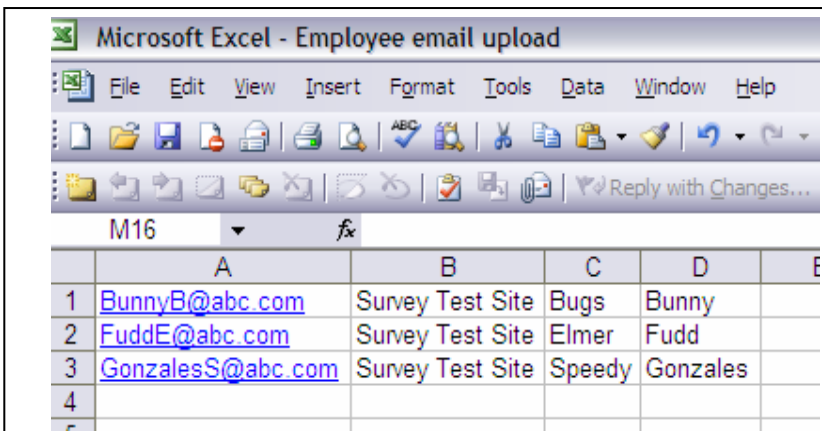
E-mail address, including domain, as UniqueIdentifier@whatever.com. This field is **required** if you upload a file of employees, and you must enter it in Column A of the spreadsheet.

Name of the worksite where you expect them to survey. This field is **required** if you upload a file of employees, and you must enter it in Column B of the spreadsheet. This name must match the “vernacular” worksite name(s) you give your jurisdiction when you ask that they set up the electronic survey for you (the worksite name that your employees at the site use to refer to it, which is the worksite name that your employees will see in the dropdown box of worksite names when they login to survey). If you click on the site in the box on the left-hand side of the ETC tools, the vernacular name will appear by the “Site” label at the top of the right-hand column, where you can copy and paste it into the worksite name field if you want.

Employee first name. This is optional. You don’t have to provide it, but if you do it goes here in column C of the spreadsheet. If you don’t include it, then the lists of employees in the survey software will show e-mail addresses but not be able to include employee names.

Employee last name. This is optional. You don’t have to provide it, but if you do it goes here in column D of the spreadsheet. If you don’t include it, then the lists of employees in the survey software will show e-mail addresses but not be able to include employee names.

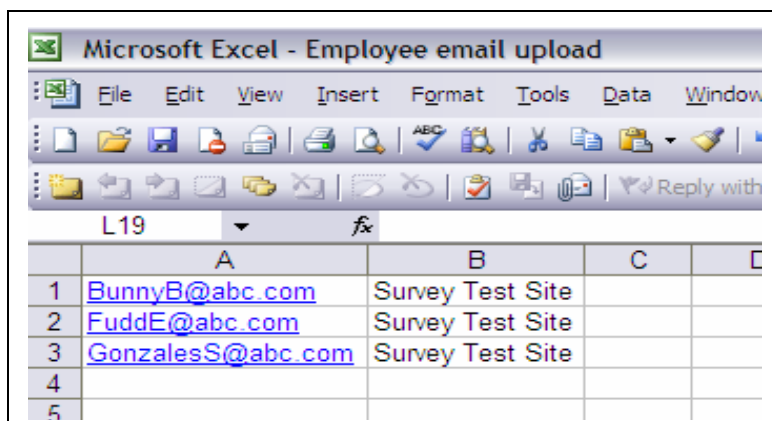
Here is a sample employee email upload list in Excel format which includes first and last names:



The screenshot shows a Microsoft Excel spreadsheet titled "Employee email upload". The spreadsheet has four columns: A (Email), B (Worksite Name), C (First Name), and D (Last Name). The data is as follows:

	A	B	C	D
1	BunnyB@abc.com	Survey Test Site	Bugs	Bunny
2	FuddE@abc.com	Survey Test Site	Elmer	Fudd
3	GonzalesS@abc.com	Survey Test Site	Speedy	Gonzales
4				

If you decide not to include the employee first and last names, just leave them blank for all employees. For example,



The screenshot shows a Microsoft Excel spreadsheet titled "Employee email upload". The spreadsheet has four columns: A (Email), B (Worksite Name), C (First Name), and D (Last Name). The data is as follows:

	A	B	C	D
1	BunnyB@abc.com	Survey Test Site		
2	FuddE@abc.com	Survey Test Site		
3	GonzalesS@abc.com	Survey Test Site		
4				
5				

To actually upload the file, login to the survey giving the access e-mail and password provided by your jurisdiction.

Click on the blue link in the right hand column “Upload list of email”

When the Employees page loads, click the browse button and select the file that you want to upload. When the file name appears in the field click “upload list”

You will see a window that lists the employee information from your file. Check the number of records that the upload software says it can import, and make sure it is the number you intended to import. If the number is correct then click “Continue”. On the next screen select “Append email addresses to sample” and click “Continue”. Your list should now appear in the box to the left of the screen titled “List of email addresses for this survey”. Your upload is now complete.

If the number of employees is lower than you expected, then you should click the button that says “cancel” and check your file for duplicate e-mail addresses. The list in the window is held “in between” your file and the survey system. The list is not transferred into the survey system until you choose continue.

If the system cannot match the worksite names in your upload file with the names it has stored for your worksites, it will prompt you to match the worksite names from your file to these names. This feature is intended to handle occasional misspellings. If you have a lot of names that do not match (perhaps because you misspelled the name when you created the file), you should probably click the “cancel” button, re-create the upload file and start the upload again. If you find that the worksite name in the survey software system has been misspelled, please contact your jurisdiction and provide the correct spelling, so that we can correct the misspelled name.

If you upload a name at a worksite and later find that the employee has moved to another worksite, you can use the “edit” function to change this. If this employee has already submitted a survey, editing the employee location will not move the survey from the old site to the new one; you will need to delete the survey from the old site and enter it into the new one, or else delete it and ask the employee to login and complete the survey again, this time at the new site.

If you later find that an employee in your uploaded list is no longer working for your employer, you can use the “delete” function to remove the employee from your list. If the employee has completed a survey, you will receive a warning message to confirm that you are about to delete the survey as well as the employee.

If you find that an employee is missing from your list after you have uploaded it, you can use the function to enter a new employee and worksite into the survey software.

How do I use the list of employees once I've uploaded it?

Controlling access to your survey

When an employee types in an e-mail address, s/he can access the survey for your sites only if you have uploaded the e-mail address. This is in contrast to allowing anyone with your employer's e-mail domain to access the survey by typing in any e-mail address and the domain. Any person who enters an e-mail address that is not in the list that you uploaded will get a message saying that the survey software cannot find an active survey for that address, and advising the employee to contact you to resolve the problem. You can then use the tools described above to add the employee to your list of uploaded addresses and thereby allow access to the survey.

If you are surveying more than one site, when your employees access the survey, they will be asked to choose their worksite from a dropdown box showing all of your sites that are surveying. If you have uploaded a list of e-mail addresses and worksite names, and if an employee chooses a worksite that is not the one that you uploaded, the system will give the employee a warning message asking him/her to contact you about this. You then can discuss this with the employee and, if necessary, edit the worksite information that you have uploaded for him/her to direct the survey to the proper worksite

Tracking progress

(See **How do I identify a list of persons who have not yet completed their surveys, so that I can send them a reminder?** in the FAQs)

I'm using an uploaded file of e-mail addresses. How do I add addresses once my survey begins?

You can either click on "survey e-mail list management" at the lower right of the ETC tools, type in an address in the add email field, and click "add." or, you can upload another file containing the addresses. Create this in exactly the same format used for the file that you uploaded (see **If I decide to upload a list of employees, how do I do it?** in the FAQs, or see Section C above). Make certain that you do not duplicate any of the actual e-mail addresses you have already uploaded. If you are creating dummy artificial addresses so that you can transcribe data from paper surveys, and if you have multiple worksites, remember that it is the e-mail address that must be unique; you may want to create a list of unique addresses first and then add the worksite to each.

To actually upload the file, the process is virtually the same as uploading your original list.