

## Testing your worksite's survey setup

Your electronic survey has been set up for the worksite(s) as requested through your jurisdiction representative. A login and password have been assigned which you will use to access the ETC survey tools. These tools will allow you to monitor your progress during the survey week.

Once you receive your login and password from your jurisdiction representative, please take a few moments to login to the site and test the survey setup. This advance testing will ensure a smooth survey week. The ETC tools can be found using the following link:

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

- **Worksite name** - Once you have logged in, the system will take you to the “Announcements” page. Select the CTR Survey option from the navigation bar. Check your worksite name(s) in the details section to the right. The worksite name is the one that employees see when they log on, so it’s important that be spelled correctly. On rare occasions we may have to adjust your worksite name because it conflicts with another worksite in the system. Your jurisdiction representative will contact you if this becomes necessary.

Employees access the survey by logging in to the survey website with their e-mail address; they do not need a password. The e-mail address is what the system uses to link the response to the worksite.

There are two ways the system can allow and limit access:

**Blanket Domain Access:** The system uses the domain name (everything after the “@” in the e-mail address as in @abc.com) to validate access. All employees using the domain name (or names) you designate in their e-mail address will have access to the survey. Please verify all domain names have been entered and spelled correctly. If any are missing or misspelled, please contact your jurisdiction representative with corrections.

**E-mail Address Upload:** The survey system uses individual e-mail addresses that you upload to validate access. You may upload a single e-mail address as described in Section A below or an entire file of e-mail addresses described in Section B. Please note that access to the survey is restricted to only those employees whose e-mail address has been uploaded.

### Section A: Single e-mail address uploads

If you find you’ve missed an address or two in your initial e-mail upload, click on the “Survey e-mail list management” link at the bottom of the right column on the “List of surveys” page. You will see an empty box at the top left-hand corner of the screen with the words “Find/Add e-mail” in front of it. Type the e-mail address into the box and click

“Add to E-mails list.” You can add individual e-mail addresses this way at any time during your survey week.

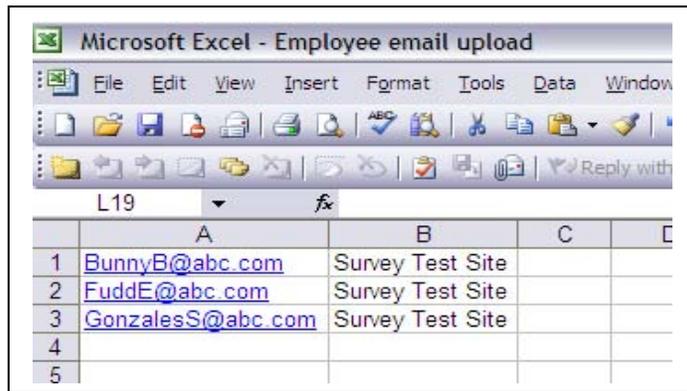
**Section B:** Upload a list of e-mail addresses

First, you will need to collect your employee e-mail addresses and prepare a list in either Excel (currently only Excel .xls files are supported, not the new .xlsx files from Excel 2007) or comma-separated values format (.CSV). Before you upload the file, please check it for duplicates, making sure that each e-mail address appears only once.

The file must include two columns – one listing full e-mail addresses and the other corresponding worksite names. You may use field headers just be sure to indicate this by checking the appropriate box as you upload your file.

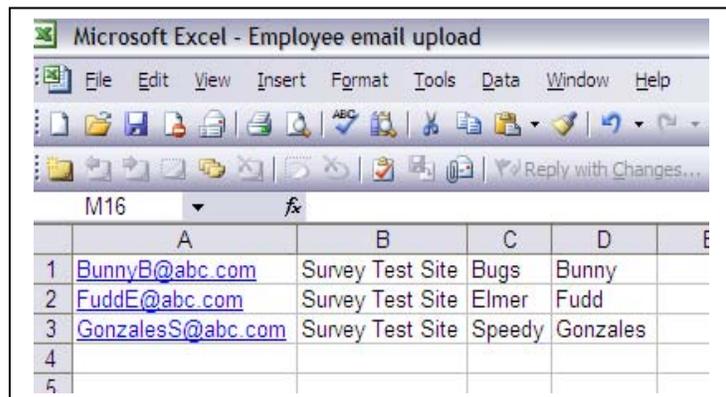
ETCs may add the employee first name and last name in the next few columns for tracking purposes. Only the e-mail addresses will be added to the system; the employee names will not.

Here is a sample employee e-mail address list in Excel. This contains the required fields in order as they should appear on your spreadsheet:



	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				

This sample contains the optional employee first names and last names to be used for tracking purposes.



	A	B	C	D	E
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					
5					

Once you've created the file with the e-mail addresses in the first column and the worksite name in the second column, save it to a folder where it can be easily located.

To upload the file, log on to the ETC Tools site using the login name and password provided by your jurisdiction representative and navigate to the "CTR survey page"

Click on the button in the right hand column "Upload list of E-mail"

When the "Upload list of e-mail" page loads, click the browse button and browse to the location where you saved the file containing your e-mail addresses and select the file. Once this file has been selected the file name appears in the field, click "upload list."

The system might take a few moments, but you should see a screen containing your list of e-mail addresses along with the worksite name. First make sure that the correct data sheet is selected in the dropdown box. This feature is for those who have multiple worksites and have created individual sheets within a single Excel workbook. Next, if you have entered field headers in your spreadsheet, check the "field names in first row" box.

Check the "Total number of records in upload file" and make sure it is the number you intended to import. If this number 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 not transferred into the survey system until you select "continue" so you may cancel and make corrections before you finish loading the addresses.

### Troubleshooting

*I've tried uploading a file of e-mail addresses but get an error message and the addresses won't load.*

Check your address list. Are the e-mail addresses in the first column and the worksite name in the second column? Does the worksite name match the one in the survey system exactly including spaces and characters? Are you selecting the right sheet number from the workbook when prompted? Are you using the correct spreadsheet format (.xls or .csv)? If you've checked that all of these things are correct and your list still won't load, Copy the e-mail addresses and worksite name and paste them into a new Excel spreadsheet. Save the new spreadsheet and try uploading again.

*What if the worksite name doesn't match what was entered in the survey system?*

If the system cannot match the worksite name in the second column of your Excel spreadsheet with the worksite name it has listed, a table will appear. This table will prompt you to match the worksite name from your spreadsheet to each of the e-mail addresses that you are trying to load. This feature is intended to handle occasional misspellings. If you have a lot of names that don't match, you should click the "cancel" button, correct any spelling errors in the upload file, re-save it, and start the upload

process again. If you find that the worksite name in the survey software system has been misspelled, please contact your jurisdiction representative and request to have it fixed.

*What if an employee selects the wrong worksite and completes a survey?*

If you discover during the survey week that an employee has selected the wrong worksite or moved worksites since you uploaded your e-mail list, you can delete the response from the incorrect site. Scroll down the list of email addresses in the left-hand box until you find the employees email address. Highlight the email address and select the “remove from list” option in the “Survey E-mail list management” screen to remove the email address and the response. Ask the employee to login and complete the survey again, this time at the correct site. Or you can print or copy the responses, delete the survey from the old site. Then log on to the survey, using the employee’s e-mail address, select the correct worksite and re-enter the survey.

If you find that an employee in your uploaded list is no longer working for your employer, you can use the “remove from list” function to remove the employee from your list. Simply navigate to the employee’s e-mail address in the box on the left of the “survey e-mail list management page,” highlight the address and select “Remove from list.” If the employee has completed a survey, you will receive a warning message to confirm that you are about to delete the survey responses and employee name from the system.

If you find that an employee is missing from your list after you have uploaded it, you can use the “Add e-mail” function (described in section A) to enter a new employee e-mail address

## **How do I use the list of employees once I’ve uploaded it?**

### **Controlling access to your survey**

An employee can only access the survey for your sites if you have uploaded their e-mail address. Any person who enters an e-mail address that is not in the list that you uploaded will receive a message stating that the survey software cannot find an active survey for the e-mail address and advising the employee to contact their ETC to resolve the problem. You can then use the tools described above to add the employee to your list of uploaded addresses and allow access to the survey.

If you are surveying more than one site, your employees will be asked to choose their worksite from a list in dropdown box. If you have uploaded a list of e-mail addresses and worksite names and an employee chooses a worksite that is not the one that you uploaded, the system will advise the employee to contact the ETC. You then can discuss this with the employee and, if necessary, edit their worksite information that you uploaded 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 add individual e-mail addresses (see directions in section A) or, can create a list of addresses and append it to the current list of e-mail addresses. Create this in exactly the same format used in section B above. Make sure that you do not duplicate any of the e-mail addresses you have already uploaded. Duplicates will not load. Go through the same process as you did to upload the first list only select "append" rather than "replace" when prompted.

For more information, please contact your jurisdiction representative.