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EchoSpan, Inc.

Employee Engagement Tool

Product Guide

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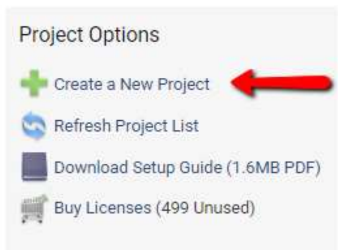
Table of Contents

Project Setup

Create a New Project

In this section, you will review a few project basics such as how to create a new project, edit the name of your project, and identify contact info and important dates for your project.

From the Feedback Projects tab, click "**Create a New Project**". This icon can be found on the right-hand side of your screen under **Project Options**.



This next screen prompts you to enter your unique Project Name and Description, as well as choose who the Administrator/main point of contact for email communications will be. Make sure to select **Employee/Engagement Survey** as your project type. For the project source, you can choose to start with a Blank Project or Duplicate an Existing Project.
Click "**Create Project**".

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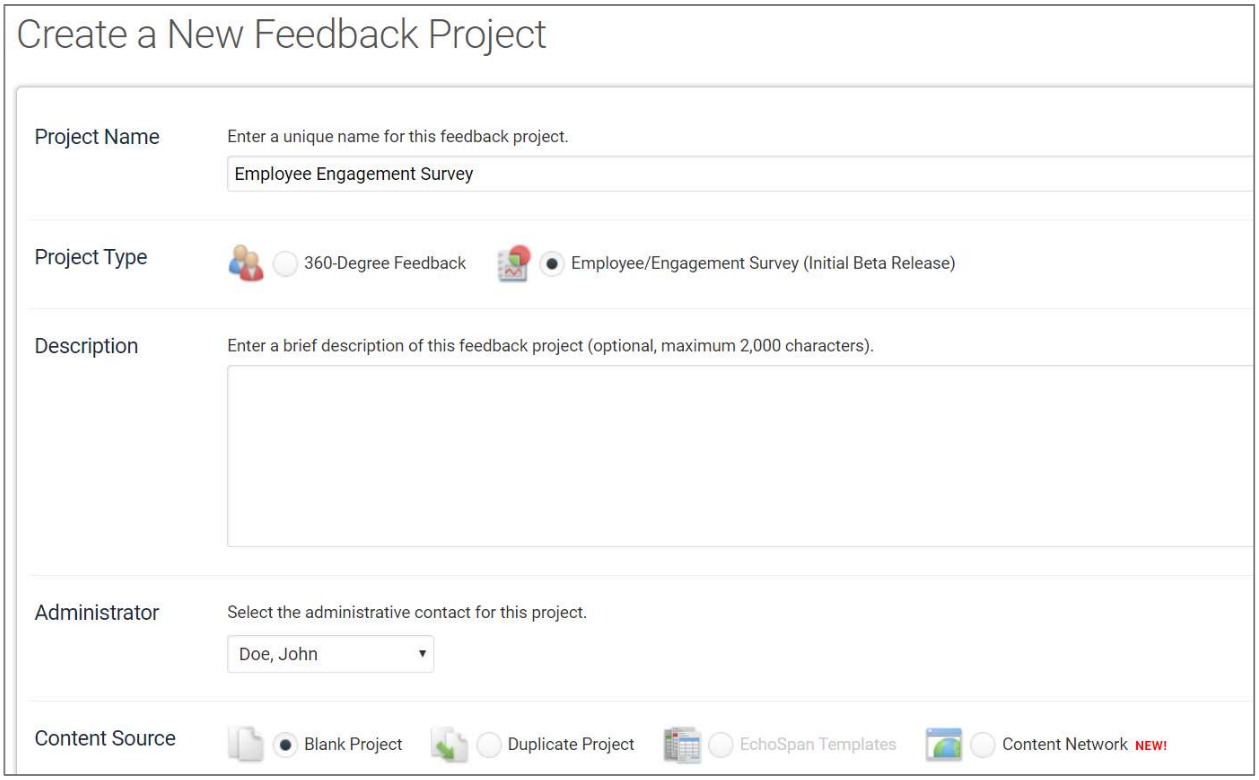

Optional: Once you have your new project created, you can verify the point of contact, important dates, and review features for the project.

1. From the **Setup** menu, select **Project Settings**.
2. Review the Project Basics and edit or populate fields related to your project.
3. Review the default Review Features that are enabled for your project.
4. Click “**Save Changes**” at the bottom right corner.

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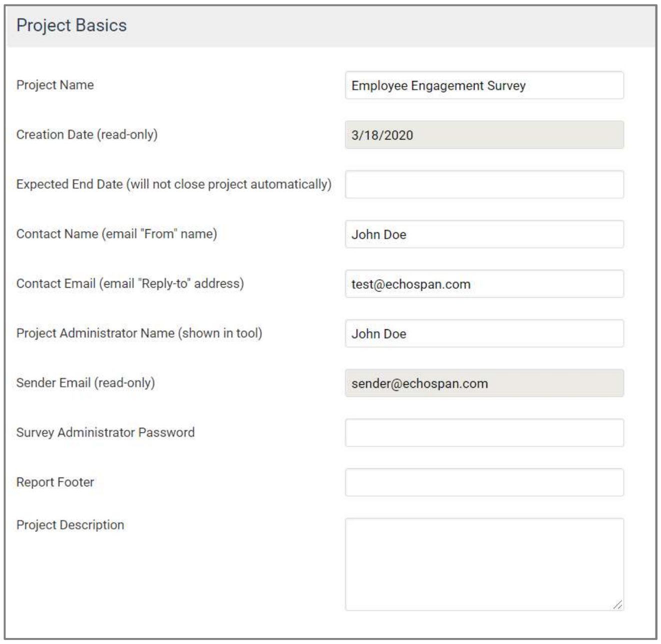
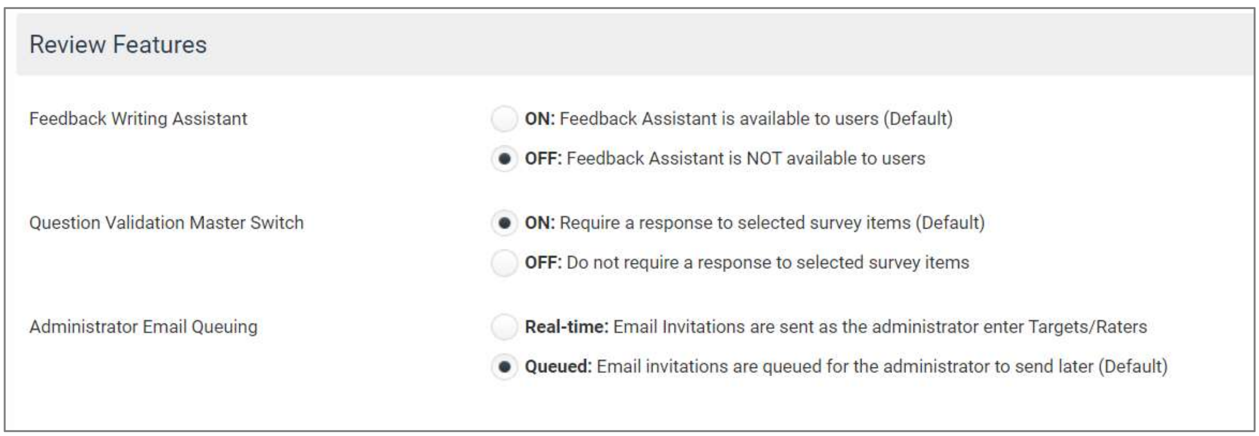


Project Basics

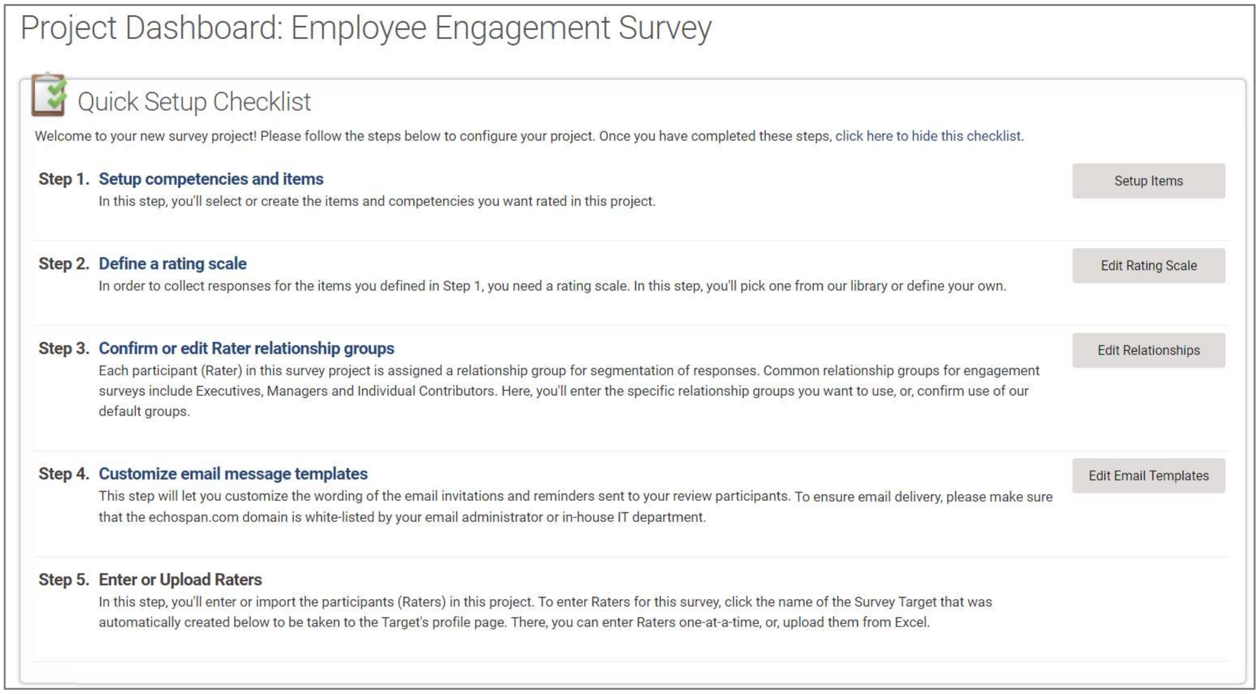
Project Name	Employee Engagement Survey
Creation Date (read-only)	3/18/2020
Expected End Date (will not close project automatically)	
Contact Name (email "From" name)	John Doe
Contact Email (email "Reply-to" address)	test@echospan.com
Project Administrator Name (shown in tool)	John Doe
Sender Email (read-only)	sender@echospan.com
Survey Administrator Password	
Report Footer	
Project Description	



Review Features

Feedback Writing Assistant	**ON:** Feedback Assistant is available to users (Default) **OFF:** Feedback Assistant is NOT available to users
Question Validation Master Switch	**ON:** Require a response to selected survey items (Default) **OFF:** Do not require a response to selected survey items
Administrator Email Queuing	**Real-time:** Email Invitations are sent as the administrator enter Targets/Raters **Queued:** Email invitations are queued for the administrator to send later (Default)

As you go through the rest of the process to set up your project, you can reference the Quick Setup Checklist (screen shot below) from the **Home** menu option.

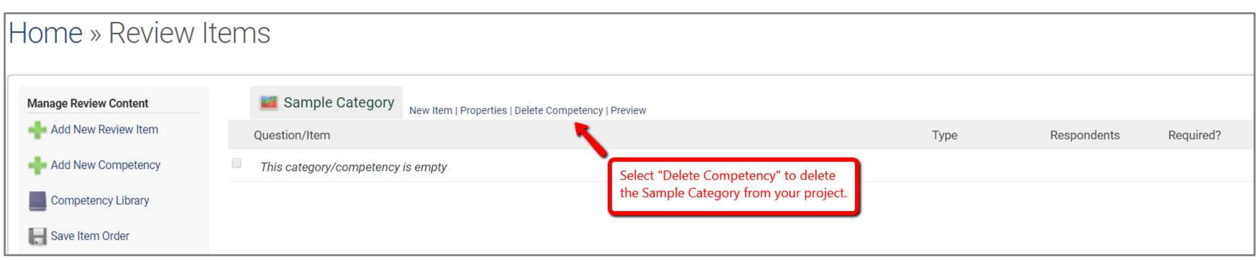


Quick Setup Checklist: Step 1 - Setup Competencies and Items

In this section, you will select or create the competencies and items you want responses for in this project.

Step 1:

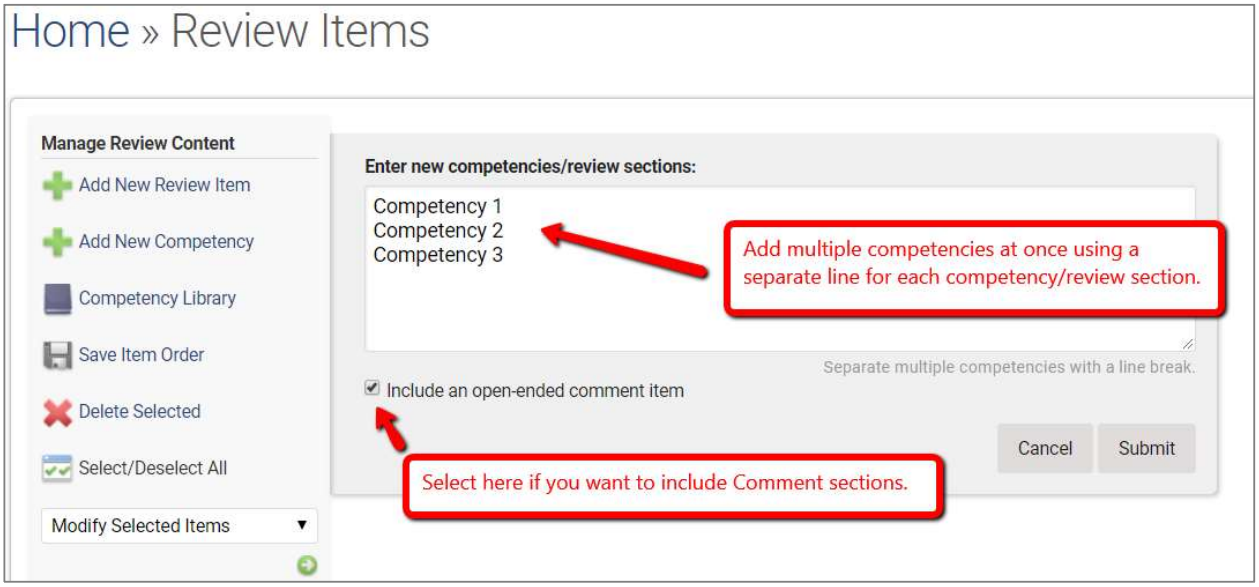
1. From the **Setup** menu, select **Review Items**.
2. Select "Delete Competency" next to the Sample Category placed in your review as an example.
3. Click "Ok" to confirm you want to delete the Sample Category.



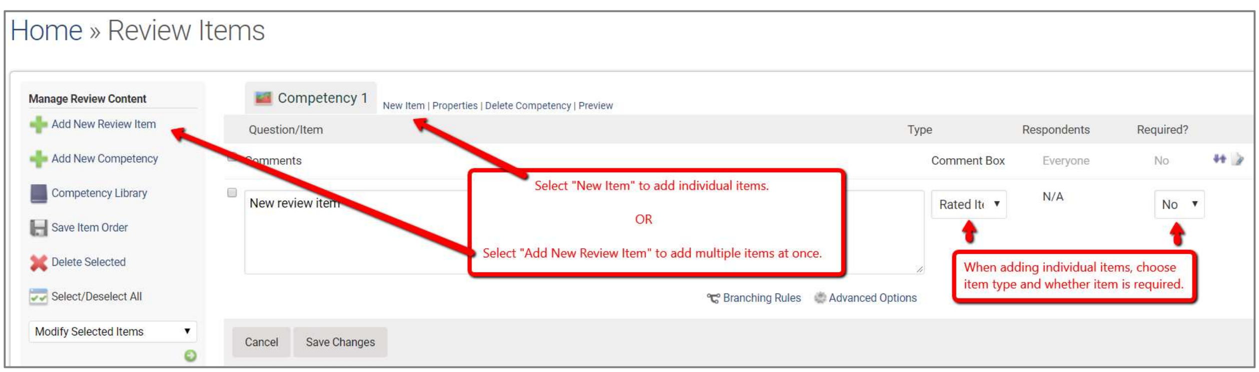
Step 2:

Add your engagement survey content to your project.

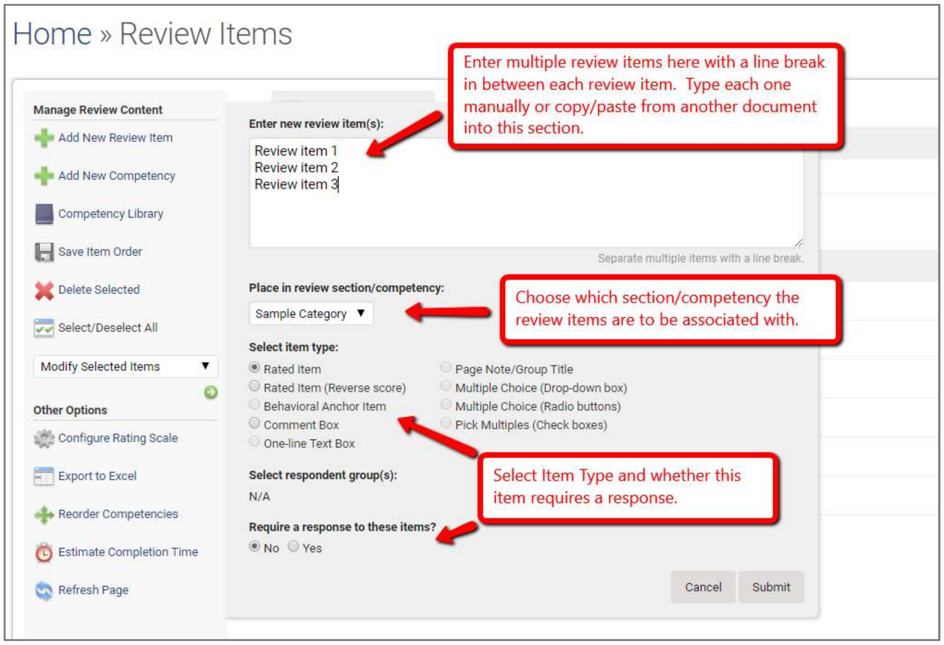
1. Click the **"Add New Competency"** option under the Manager Review Content menu on the left. Here you will be able to add competencies one at a time, or multiple competencies all at once.
2. Type in your Competency names, separating each new competency by a line break OR copy and paste the list of competencies from a Word or Excel document.
3. Select the box to the left of **"Include an open-ended comment item**" if you want to include a comment section for each competency that you add.
4. Click **"Submit"**



5. Next, click the "**New Item**" link to the right of the competency name and type in or copy and paste your item content into the text box, then edit the item settings as needed. You will also be able to choose the item type and whether or not the item is required.



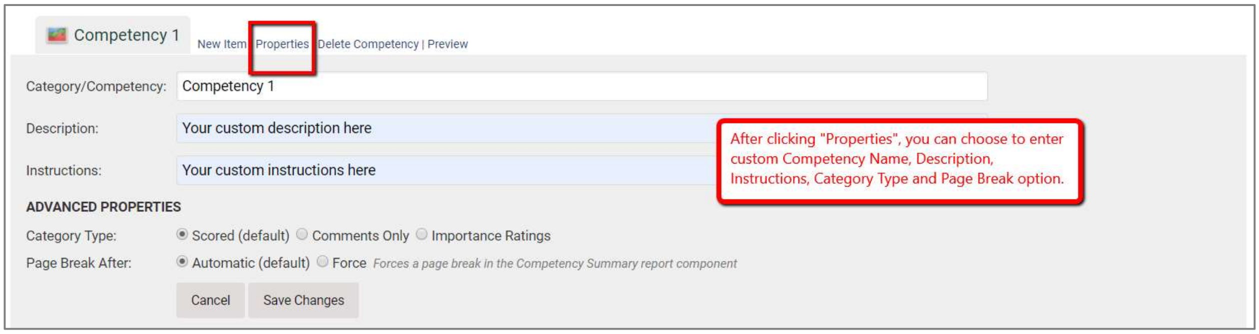
6. You can add multiple items to a competency at one time by clicking the "**Add New Review Item**" button under the Manager Review Content menu on the left. The items should be separated by a line-break if entered manually **OR** you can copy and paste them into the text box from a Word or Excel document. Make sure to select the Competency you want to add them to from the review section/competency drop-down box, select the item type, and choose whether you want the response to be required.



Step 3:
If you would like to segment your results by demographic you will need to create a demographic competency. The responses to the items in your demographic competency may be used to segment and filter the results that are included in your report output. These items should be added as a multiple choice radio or multiple choice pick from list item type.

Step 4:
Optional: Add competency descriptions and instructions.

1. Click the "**Properties**" link next to any competency name. There you will see the editable fields for descriptions and instructions. Make sure to **Save Changes.**



Step 5:
Review the order of your review contents and save the item order.

1. Click and drag the item(s) into their new position using the up and down arrow icon.

2. Click "**Save Item Order**" at the left of the page.
3. The new order will be reflected on the review response pages as well as standard reports.

Quick Setup Checklist: Step 2 - Define a Rating Scale

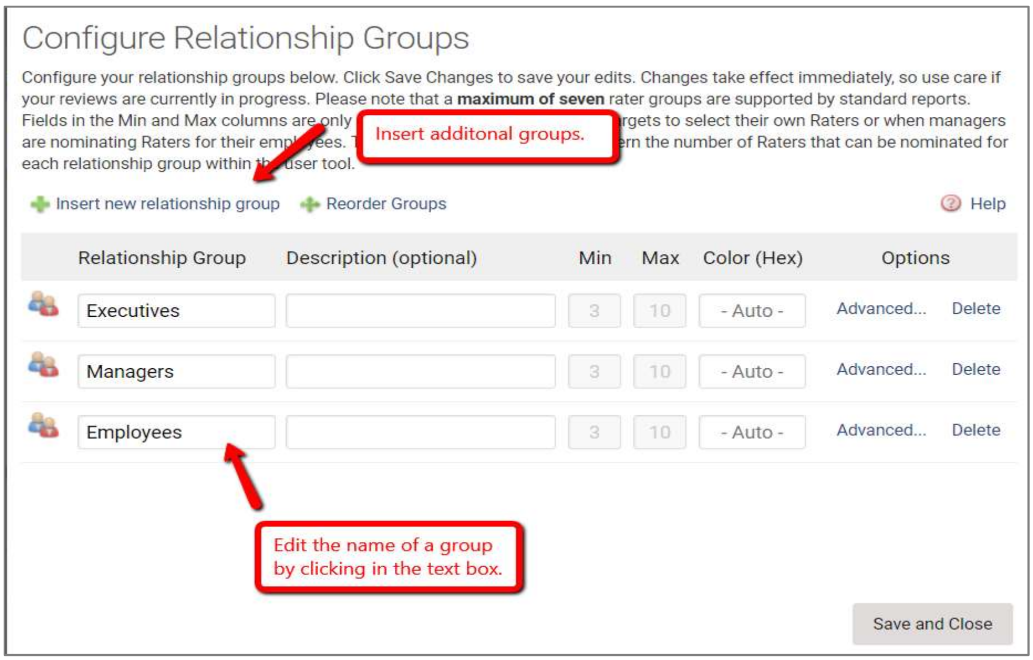
In order to collect responses for the rated items you defined in the last step, you need a rating scale. In this step, you will pick one from our library or define your own.

1. From the **Setup** menu, select **Rating Scale**.
2. View example rating scales by selecting the link "**View example scales**" and select an option if you wish to use one of these presets.
3. Edit the labels of the rating scale by clicking within the textbox.
4. Add a description of each label in the description textbox next to each label (optional).
5. Add a value to each label starting with "0". Any value of "0" will be omitted from scoring (ex. Not applicable or Not Observed). Ratings should go in order from lowest to highest, with highest being the best.
6. If you need additional rating scale items, click "**Insert new rating scale item**".
7. Delete a rating scale item by clicking "Delete" to the right of the item. (Scale items should NOT be deleted once responses exist.)
8. You can select how the scale will be displayed by choosing the radio button at the bottom of the pop-up.
9. Click "Save & Close".

Quick Setup Checklist: Step 3 - Define Rater Relationship Groups

In an Engagement survey, relationship groups are defined as groups you establish to participate in the review process. In this step of the setup process you will enter the relationship groups you want to use, or, confirm use of our default groups. Results in the Employee Engagement Survey may be segmented by the relationship groups of your respondents, as well as their answers to the items in the demographic competency if you choose to include.

1. Choose the **Setup** menu option >> **Relationship Groups**.
2. By default, the tool will create three relationship groups for your survey, Executives, Manager, and Employees. Now you can choose to edit those groups or add additional groups in your project.
3. You can add more relationship groups by clicking "**Insert new relationship group**" at the top of the page. Please note the maximum number of relationship groups supported by a standard report is ***seven***.



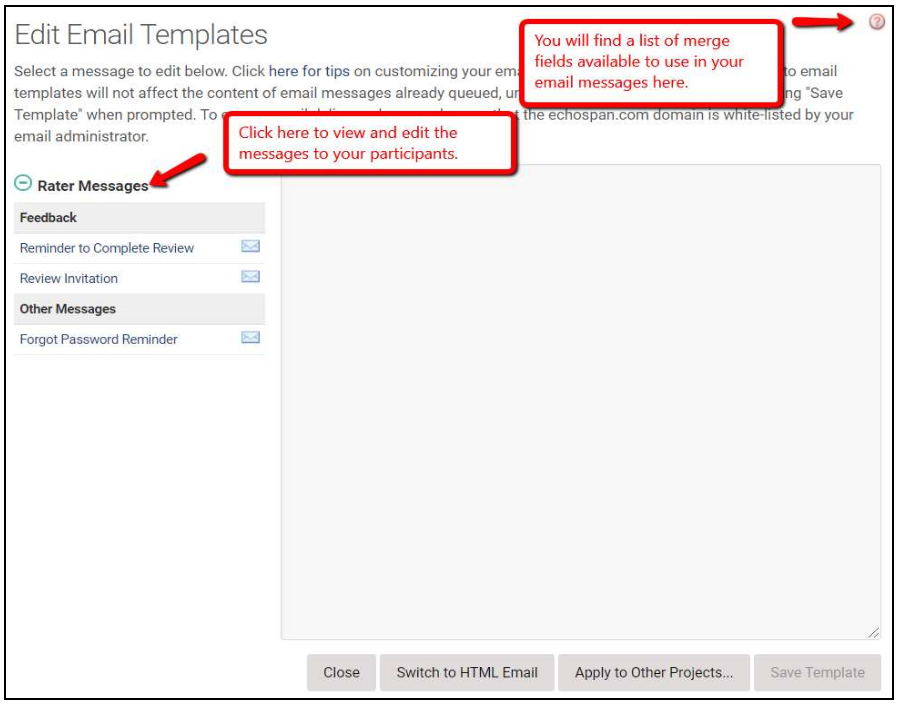
4. If you need to delete a relationship group, select "**Delete**" to the right of the relationship group. ****Relationship groups may NOT be deleted if responses exist for any raters within that group*.
5. Click "**Save and Close**."

Quick Setup Checklist: Step 4 - Customize Email Message Templates

This step will let you customize the wording of the email invitations and reminders sent to your review participants. To ensure email delivery, please make sure that the echospan.com domain is white-listed by your email administrator or in-house IT department.

Confirm/ Edit email content

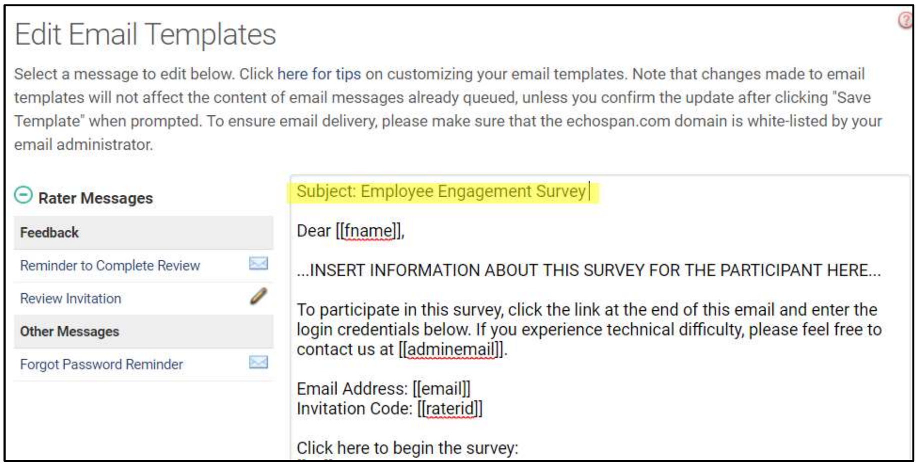
1. From the **Email** menu, select **Edit Email Templates**.
2. Click on the Rater messages option to choose the message you would like to edit. You can edit the wording of the template and/or copy and paste in your own content.
3. You will notice that there are words in double brackets in each template, ex. [[targetname]]. These are merge fields that are going to automatically customize each participant email based on the information in your account. If you would like to include additional custom fields, a list of them can be found by clicking on the red question mark in the top right corner of the email editing section. To embed login credentials for your participants you will need to include the [[URL]], [[username]], and the [[raterid]] merge fields in the Review Invitation email template.



4. Once Raters are added to your project, emails will be queued for them (by default) using the templates in the system at that time. If you make changes to the templates after the participants' invitations have been queued, the system will prompt you to re-queue your messages using the updated templates.

Edit the subject of any email

1. From the **Email** menu option, select **Edit Email Templates** and choose the template you want to edit.
2. Type "Subject:" followed by your subject on the first line of the email template.
   Example - Subject: Your Subject Here



3. Click "**Save Template**."

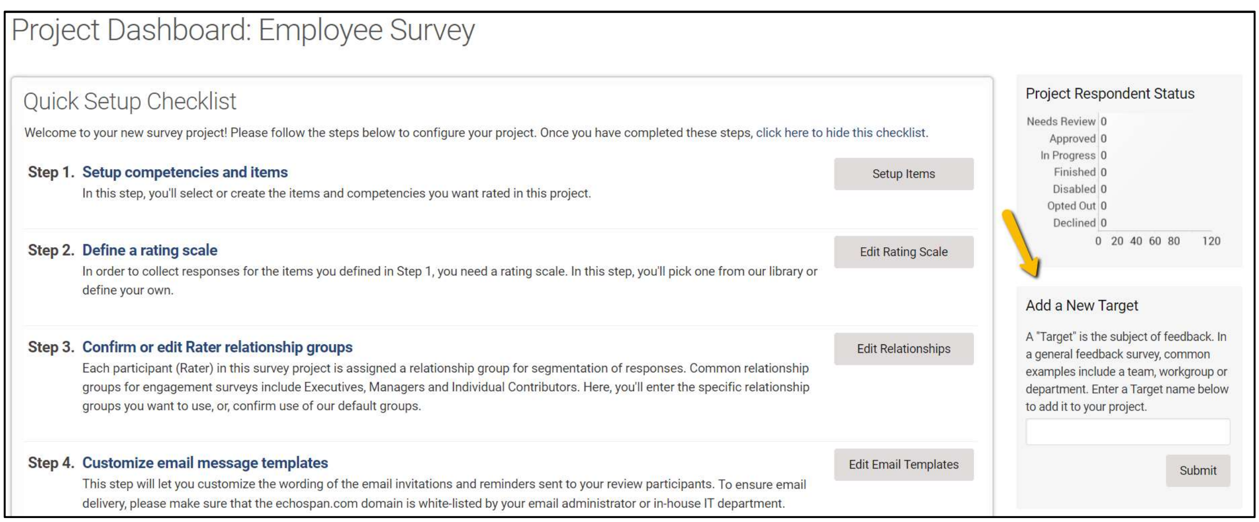
Quick Setup Checklist: Step 5 - Enter Raters

In this step, you'll enter or import the individuals you want to participate in the review process.

RATERS: Raters are the individuals that provide feedback about the organization in Employee Engagement Reviews.

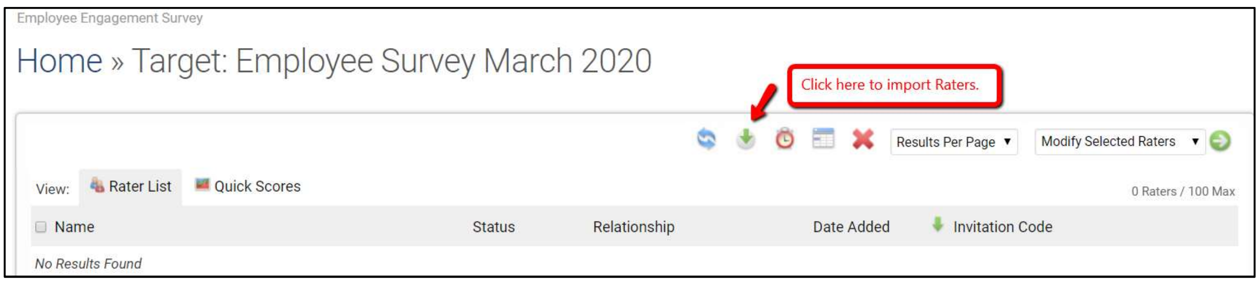
Option 1: Import Raters from an Excel spreadsheet.

1. From the Home page of your project, add the target/organization using the "Add a New Target" section.



2. Then, click on the Target name to open the target profile and add Raters.

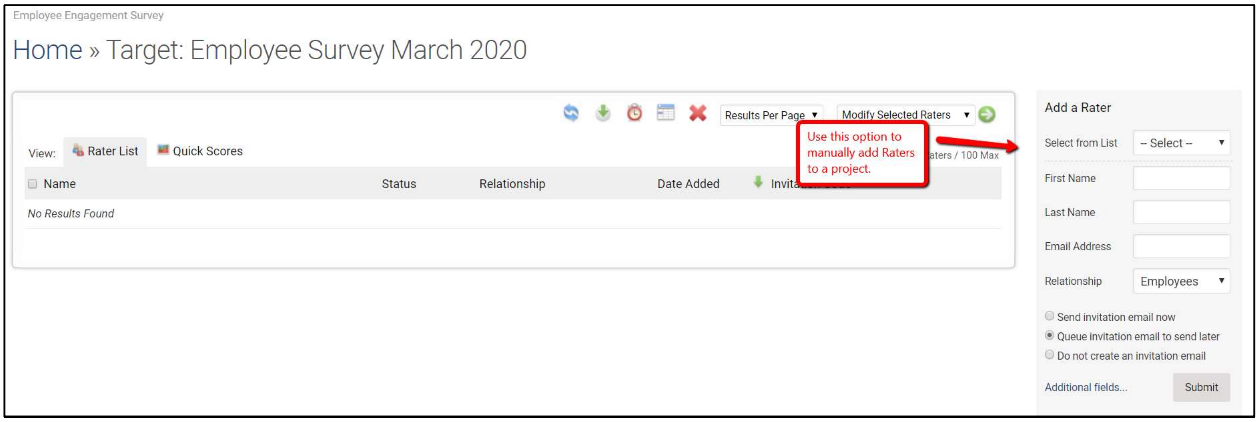
3. From the Target profile page click the icon, shown below, to import a list of Raters from an excel file.



4. Download the Rater Import template in excel.
5. Populate the spreadsheet and confirm your Excel fields (columns) are in the following order: Rater first name, Rater last name, Rater email, Rater relationship group, then Copy and paste your Excel data into the space provided.
6. Select the "**Preview Upload**" button and confirm that your import fields are correct by looking at the Error Messages column. The system will verify that the relationship groups in your excel file are a direct match to the relationship groups that are set up in the project.
7. Click "**Upload Selected Raters**" to import your list. Emails will be queued for all Raters upon completion of the import.

Option 2: Raters can also be added to a project one at a time.

1. From the "Target's" profile page you will see the option to "**Add a Rater**".

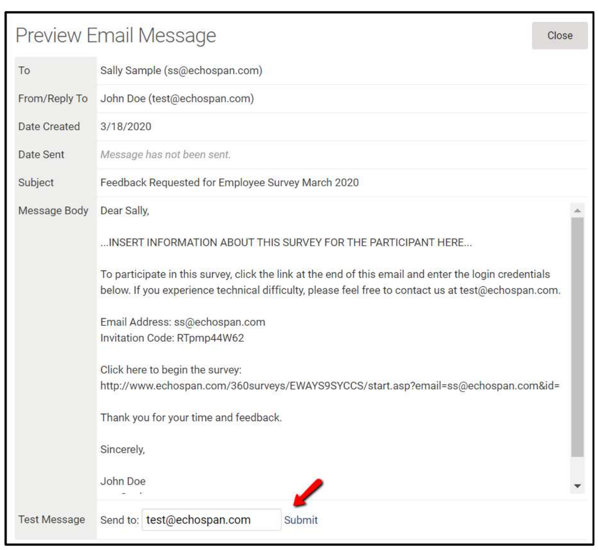


2. Fill in the required fields- First Name, Last Name, Email Address, and select their Relationship. Then choose whether you want the email invitations to route to a queue for review before sending, or send them immediately.
3. Click "**Submit**."

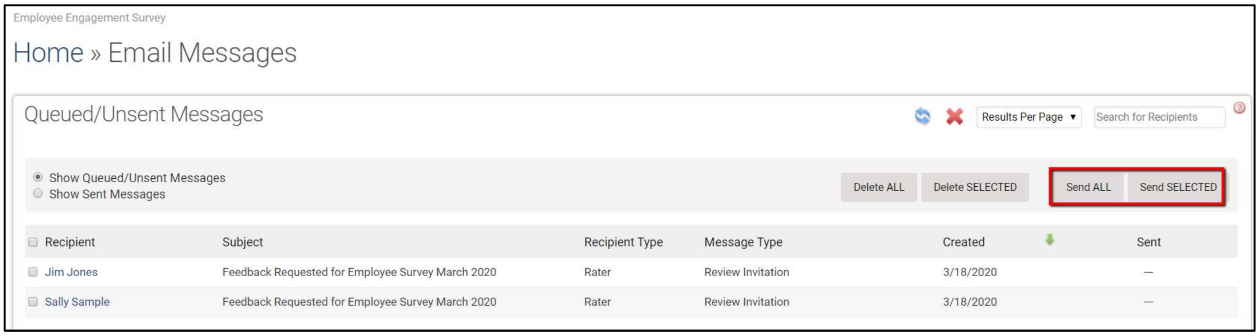
Reviewing/Sending Emails:

The system will always queue messages by default. When messages have been queued, the administrator can decide to send a participants' email/invitation by following the steps below:

1. From the **Emails** menu, select **Queued Messages**.
2. You can preview the email by clicking the name of the recipient.
3. When viewing the Preview Email Message, please note the option to send yourself a test email.



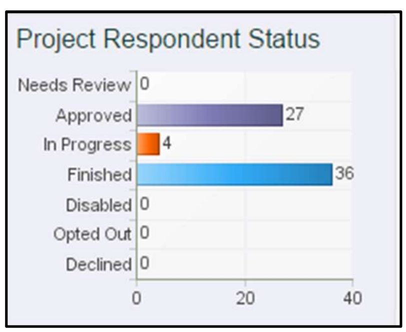
4. You can choose to **Send ALL** messages or to just send the ones you have selected using the box next to each participants' name by choosing **Send SELECTED.**



Project Management

View Overall Project Status

1. Open the project.
2. To the right of the Project Dashboard you will see the "Project Respondent Status" which will give you the overall project status.

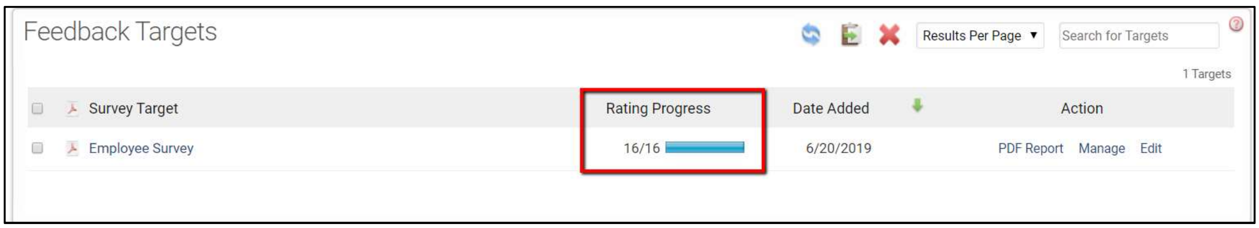


Review Status
Shows the current status of the Raters in the overall review process.

- Approved - The Rater is approved to start the review process.
-
- In Progress - The Rater is in the process of completing the review.
- Finished - The Rater has successfully completed the review.
- Disabled - The Project Administrator has disabled the Rater's access.
- Opted Out - The Rater has decided to opt out of participating in the review.

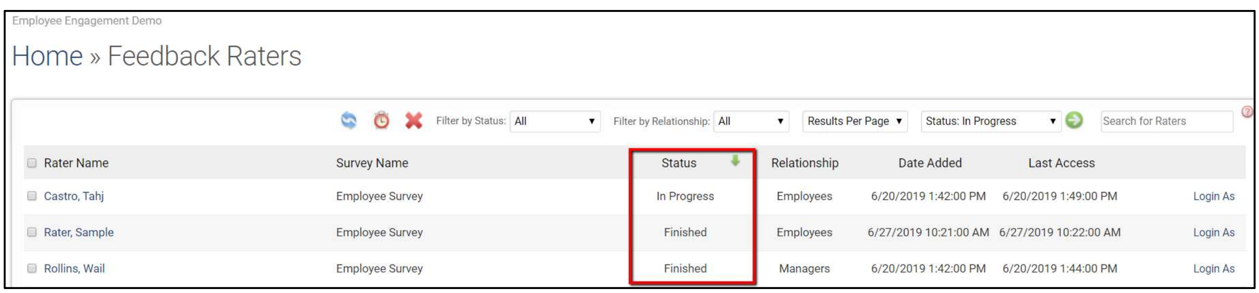
Track a Survey’s Rating Progress

1. Navigate to the **Home** page of the project.
2. To the right of the Target’s name you will see the Target’s Rating Progress. This shows you how many surveys have been completed vs. how many raters were assigned to complete the survey.



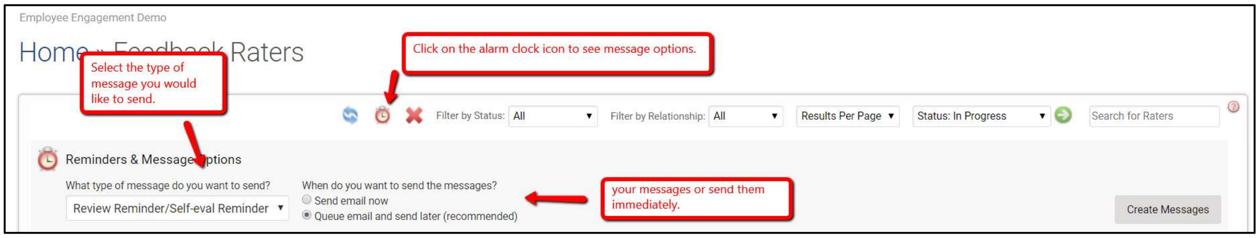
Track Rater Review Statuses

1. From the **Raters** menu, select **Manage**.
2. To the right of each Rater’s name you will see their review status.



Send Review Reminders to Raters

1. From the **Raters** menu option, select **Manage**.
2. Click the alarm clock icon at the top of the page.
3. Select the **Review Reminder** in the message type dropdown box.
4. Choose if you want your message sent now or queued for later.



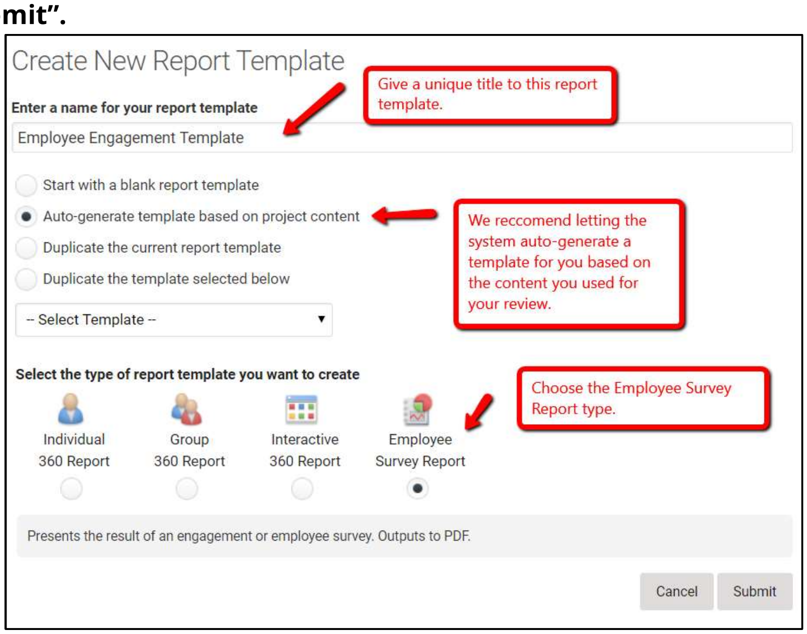
5. Check the Raters you want to send/queue reminders for. (The system will not let you remind Raters that have completed all of their reviews.)
6. Click the "**Create Messages**" button to send/queue the email.

Report Customization, Generation, and Distribution

Create and Customize a Report Template for Your Project

Create a template:

1. From the **Reports** menu, select **"Edit Report Templates".**
2. Click **"Create a new template"** from the menu on the left side of the page.
3. Title your report template using a title unique to your project. Select how you would like your template created; we recommend letting the system auto-generate your report template based on your project content.
4. Make sure to select the **Employee Survey Report** type.
5. Click **"Submit".**



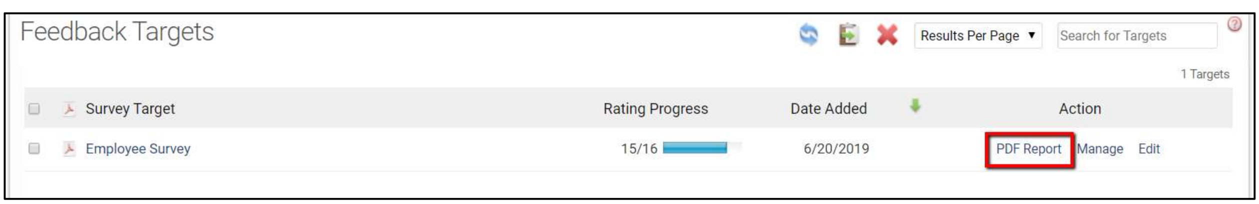
Customize your Template:

1. Each component in your report template has settings that can be configured. All components allow you to use a custom title and introductory text and some components have more advanced settings.

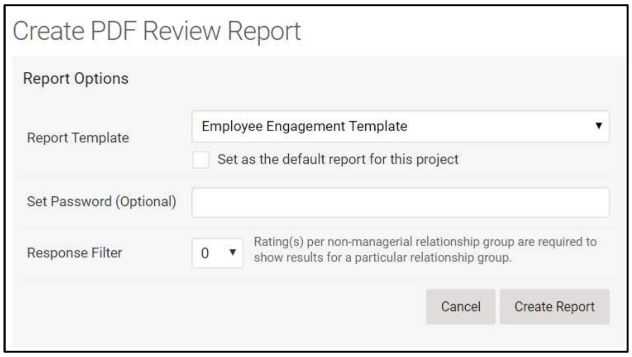
   If you choose to segment your reports based on demographic information you will find the resources to do so within the report component settings. These can be adjusted each time you run the project report for different data sets in each report generated.

Generate Your Employee Engagement Report

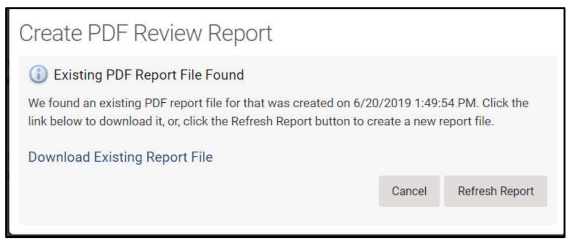
1. Navigate to the **Home page** of your project.
2. Click the PDF Report link to the right of the Target name.

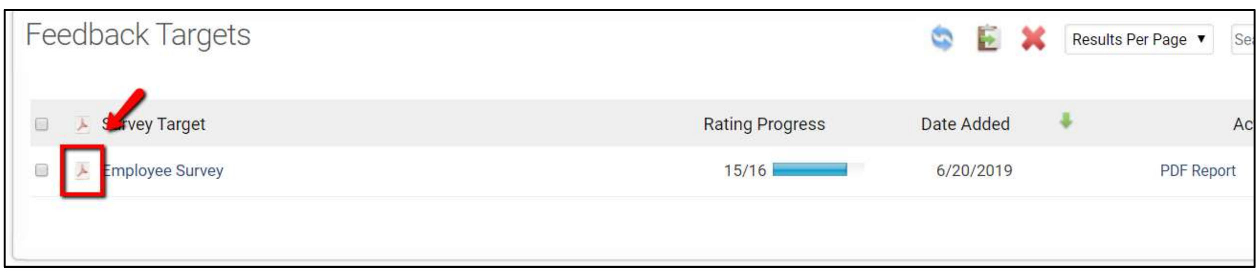


3. Select the Report Template you want to use to generate the report. All Employee Engagement Report Templates for your account will appear here.
4. Click “**Create Report**”.



The report should take 30 seconds or less to generate and then you can download it by clicking on the link that appears when the report is ready. The PDF icon will also appear on the Feedback Target list after the report is generated and can be clicked on to view the report.

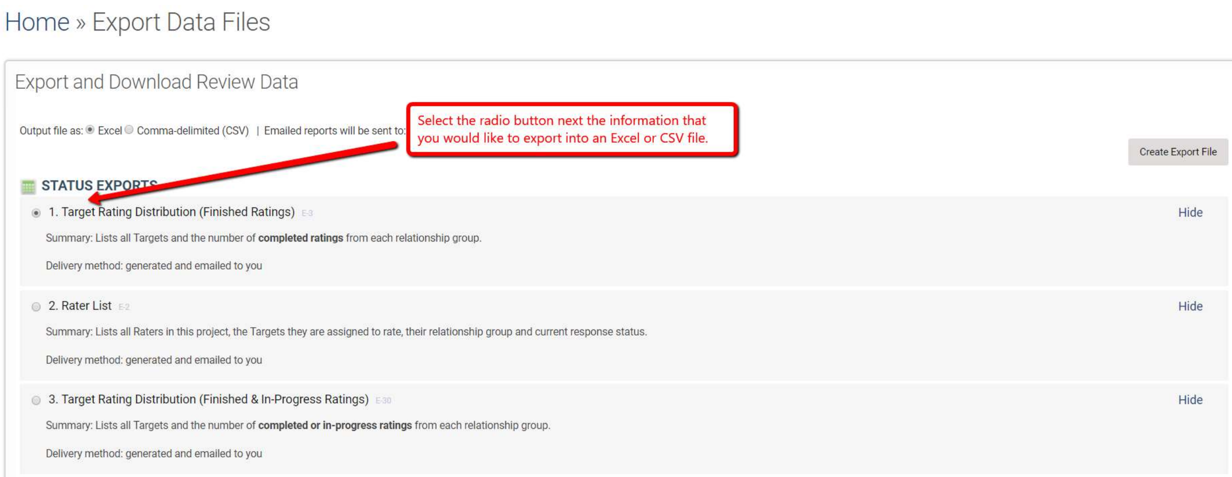




Export Review Data to Excel

You can export data from any project to Excel by following the instructions below.

1. From the **Reports** menu, select **Export Data Files**.
2. Select the radio button next to the information you want to export. You can export information such as status reports, answers to competencies and items, and comments.



3. Click “**Create Export File**” near the top of the page.
4. Files will be emailed to you once they are generated.