



# WORKFORCE ENGAGEMENT SURVEY TOOL

QUICK START GUIDE  
COMPANY CHAMPION

Powered by **Atlas**<sup>TM</sup>  
Knowledge to perform

**STEP CHANGE IN SAFETY**



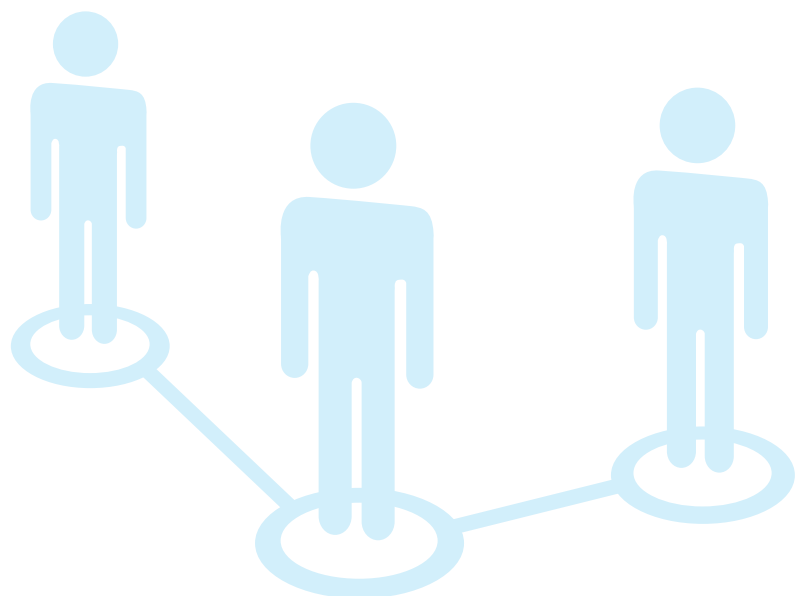
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# WORKFORCE ENGAGEMENT IN SAFETY

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# WORKFORCE ENGAGEMENT IN SAFETY


## Initial Log-in

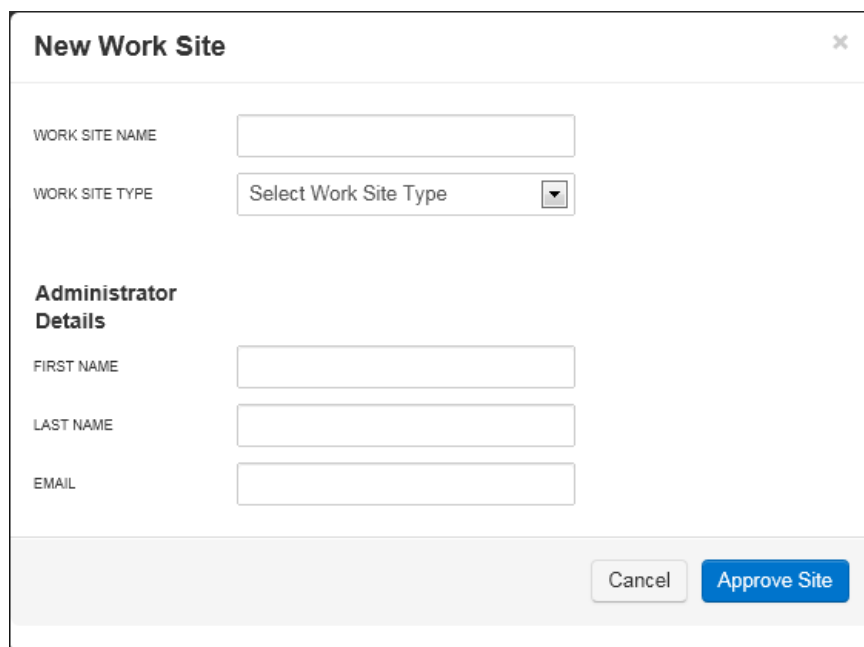
Once you have successfully logged in (<http://west.petrolearn.com>) with the log-in details you will receive by e-mail from the system, it is recommended that you change your password to something more personal, which can be done by clicking on your name in the menu bar and select 'Profile'. This will allow you to change your password and other contact details.

## Add Worksites

After log-in on the portal homepage, click on your 'Company Name' in the menu bar.

If you have any survey requests from staff or contractors from any of your work sites, then these will appear at the top of the page. More details on how this process works can be found in the section 'Dealing with inbound Work Site Survey Requests' on page 8.

To set-up a new work site directly within the portal, click on the  button in the work sites header and enter the work site details:



**New Work Site** ✕

WORK SITE NAME

WORK SITE TYPE

**Administrator Details**

FIRST NAME

LAST NAME

EMAIL

Enter the name of the work site, select the work site type and provide the name and e-mail address of your preferred site administrator. Note you can add further administrators later in the process.

Additional work sites can be registered by repeating the above process.

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## Create Survey

To create a survey, click on the company name in the menu and then on the relevant work site name:

Work Sites						
WORK SITE NAME	ADMINISTRATOR	MATURITY	STATUS	START DATE	END DATE	RESPONSES
BP Test Site	Harry van der Vossen	Maturity	<span style="color: red;">●</span>			

On the following screen, specify the survey parameters as follows:

### Workforce Engagement Survey

This survey is not currently live.  
To create the survey, please complete the fields below. Please note the Survey window cannot be shorter than 14 days or longer than 3 months.

Survey Start Date	<input type="text" value="03/09/2012"/>	Survey Size	<input type="text" value="180"/>	<input type="button" value="Create Survey"/>
Survey End Date	<input type="text" value="03/11/2012"/>	Survey Name	<input type="text" value="Baseline Survey"/>	

Note the survey start date must be a future date and the survey end date should be no later than 3 months from the start date.

The survey size is the expected number of responses on the survey at this site, and the survey name is a descriptive name you give to this first survey (any subsequent surveys will have their own name).

In the Employers / Contractors section, add the names of the main contractors that are represented on this worksite. Most contractor companies will be available from the short list, but if they are not, you can enter the name in the input field and add them as a contractor. This selection is important because it will allow your work site contractors to associate themselves with their employing company, hence making it possible for future report filtering.

### Employers / Contractors


Please populate this section with the Employing companies of your workers for use in the survey

<input type="text"/>	<input type="button" value="Add New Contractor"/>	<small>* please try not to duplicate companies with minor name differences</small>
<input type="button" value="Wood Group PSN"/>	<input type="button" value="Baker Hughes"/>	<input type="button" value="Schlumberger"/>
<input type="button" value="Halliburton"/>	<input type="button" value="Weatherford UK Ltd"/>	<input type="button" value="BP Exploration"/>

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Finally, you can add further Administrators in the Administrator section on this page:

**Administrators**

Harry van der Vossen	harryvandervossen@atlasinteractive.com	
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**Add Administrator**

First Name  Last Name  Email




Alternatively, you can click on the  button to remove existing Administrators to the point where the Champion can be the only one that has the rights to administer the survey.

When you press the 'Create Survey' button, the survey will be set-up and initiated.

## Managing a Live Survey

Once a survey has been initiated, you can view its progress by clicking on the work site name, this will reveal the following survey dashboard:

**Workforce Engagement Survey (Baseline Survey)**

Overview | Survey URL: <http://west.petrolearn.com/survey/b38zv3>   


Paper Tracking	Start date	Survey Size
Close Survey	<b>03/09/2012</b>	<b>180</b>
	End date	Responses
	<b>03/11/2012</b>	<b>0 online, 0 paper</b>
	Days remaining	Response Rate
	<b>60</b>	<b>0%</b>


The dashboard will show the start date, end date, days remaining, survey size, online responses, paper responses and a response rate as a percentage of the survey size. It will also show the URL to access the unique online survey for this work site.

This URL can be distributed to the worksite staff and contractors either by e-mail or any other means (e.g. placing a short-cut to this URL on the various computer desktops that may be used to complete the survey).

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The preferred method for participating in the survey is to complete the online survey form. Only in exceptional circumstances should a paper survey be used as this will carry a lot of additional administrative burden.

To view the online survey, click on the  button.

To view the PDF (printable) version of the survey, click on the  button, which should also be used to print paper copies of this site specific survey.

To e-mail the details of this unique survey to anyone (even yourself!), click on the  button.

## Manage Paper Surveys

The preferred method for collecting Workforce Engagement Survey responses is the online version of the survey. However, if you need to allow for paper survey response as well, then the system will provide some tools to assist you in this process.

Before any paper responses are sent to Step Change in Safety, they need to be bundled and logged in a tracking system. To administer paper survey responses, click on the 'Paper Tracking' menu item:

### Workforce Engagement Survey (Baseline Survey)

[Overview](#)

**[Paper Tracking](#)**

[Close Survey](#)

Paper surveys should be collected, boxed and periodically returned to Step Change. All returns must be recorded here before they can be imported.


Step Change in Safety  
3rd Floor, The Exchange 2  
62 Market Street  
Aberdeen, AB11 5PJ

Quantity

Dispatch date

DISPATCHED	QUANTITY	RECEIVED	IMPORTED
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Whenever a batch of surveys have been collected and is ready for entry into the system, specify the number of survey responses and the date that this batch is dispatched to Step Change in Safety. Please mark the parcel clearly with the address indicated above, and note the unique 8 digit/number survey code, which is printed at the footer of each paper survey.

Click the  button, which will create an entry in the associated table. When the batch has been received by Step Change, it will be marked up with the RECEIVED date. When the surveys have been entered into the system, it will show the relevant date in the IMPORTED column. This data will be available for every batch that is sent in.

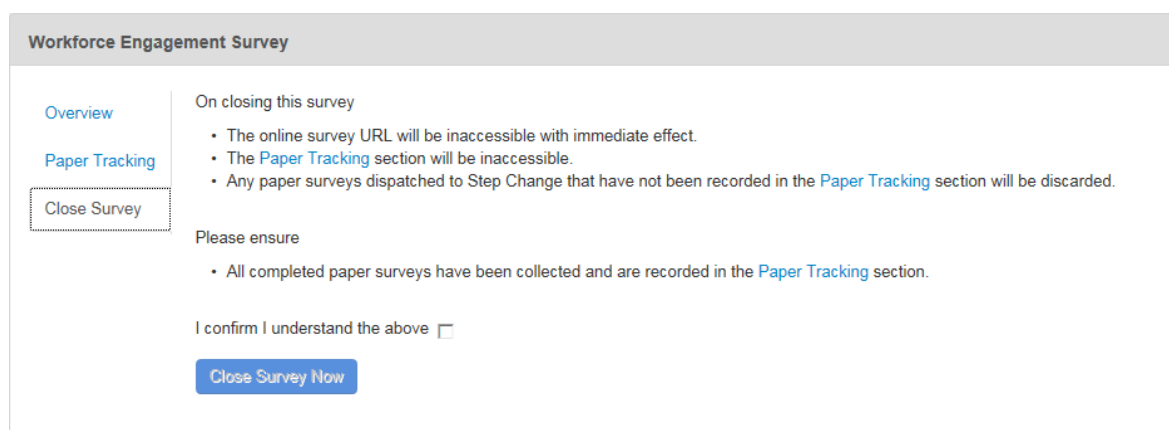
NOTE: batches that are received by Step Change, but that are not registered in the above screen, cannot be imported to contribute to your worksite survey results.

# WORKFORCE ENGAGEMENT IN SAFETY

## Close a Survey

To close a survey, click on the 'Close Survey' menu option.

NOTE: once you have closed a survey, it is essential to understand and acknowledge the following:



The screenshot shows the 'Workforce Engagement Survey' interface. On the left, there is a navigation menu with three options: 'Overview', 'Paper Tracking', and 'Close Survey'. The 'Close Survey' option is highlighted with a dashed border. The main content area is titled 'On closing this survey' and contains the following text:

- The online survey URL will be inaccessible with immediate effect.
- The [Paper Tracking](#) section will be inaccessible.
- Any paper surveys dispatched to Step Change that have not been recorded in the [Paper Tracking](#) section will be discarded.

Below this, it says 'Please ensure' followed by:

- All completed paper surveys have been collected and are recorded in the [Paper Tracking](#) section.

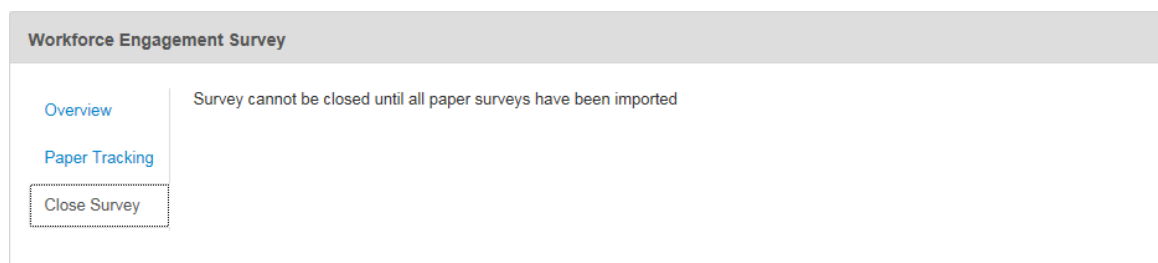
At the bottom, there is a checkbox labeled 'I confirm I understand the above' which is currently unchecked. Below the checkbox is a blue button labeled 'Close Survey Now'.

- The online survey URL will be inaccessible with immediate effect
- The paper tracking section will be inaccessible
- Any paper surveys dispatched to Step Change that have not been recorded in the paper tracking will be discarded

Therefore it is essential that all completed paper surveys have been collected and are recorded in the paper tracking section.

NOTE: You must tick the 'I Confirm and I Understand' check box before you can close the survey.

NOTE: You cannot close the survey if there are paper survey responses waiting to be imported. If that is the case, you will find the following message:



The screenshot shows the 'Workforce Engagement Survey' interface. On the left, there is a navigation menu with three options: 'Overview', 'Paper Tracking', and 'Close Survey'. The 'Close Survey' option is highlighted with a dashed border. The main content area displays the following message:

Survey cannot be closed until all paper surveys have been imported

If this is the case, you must check back one or two days later to see if the final batch has been imported.

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## View Survey Report

Survey reports can only be viewed once the survey has been closed and all (recorded) paper survey responses have been imported in to the system.

To view the survey report, select Company Overview from the Company Name in the Menu.

Work Sites <span style="float: right;">+</span>						
WORK SITE NAME	ADMINISTRATOR	MATURITY	STATUS	START DATE	END DATE	RESPONSES
<a href="#">Dunlin</a>		Level X	<span style="color: red;">●</span>	15/09/2012	18/11/2012	110 / 110

Click on the work site name to reveal a screen that will contain a section titled 'Historic Surveys'.

NOTE: If there are no historic surveys, then this section will not appear.

Historic Surveys				
SURVEY NAME	START DATE	CLOSE DATE	SURVEY SIZE	RESPONSE COUNT
Pilot Survey	15/09/2012	18/11/2012	110	110 <a href="#">View Report</a>

You can now click on the 'View Report' link to open the online dynamic version of the survey report.

The online report consists of a number of sections:

- Maturity Report
- Dimension Report
- External Benchmark Report (Detailed Question Results)
- Detailed Reports for each of the individual dimensions
  - Visibility
  - Communication
  - Involvement
  - Support
  - Participation
  - Challenge

Each of the report sections can be viewed by clicking on the section title to reveal the results. To hide the report section, click on the section title again. To produce the entire report in PDF format, click on the printer icon next to the section title.

Maturity Report <span style="float: right;">🖨️</span>
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## Dealing with inbound Work Site Survey Requests

It is possible and very likely that you, as the Workforce Champion in your company, receive requests for a survey to be conducted on one of your work sites. These requests could come from anyone working on one of your assets.

This request will trigger a system e-mail alert to your e-mail address, informing you that a named individual has requested the work site to be registered for the survey.

The next step is for you to log in to the Workforce Engagement Portal and select your company name. You will find the most recent request listed at the top of the page:

Harry van der Vossen has requested the registration of Atlas Hq							Accept / Reject
Work Sites							+
WORK SITE NAME	ADMINISTRATOR	MATURITY	STATUS	START DATE	END DATE	RESPONSES	

This request will only be listed if the Work Site has not yet been set-up in the system. Clicking the 'Accept/Reject' button will bring up the following dialog:

### Work Site Request

WORK SITE NAME:  (edit if required)

WORK SITE TYPE:

**Administrator Requests**

Harry van der Vossen	harryvandervossen@atasknowledge.com	ACCEPT	REJECT
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The Work Site Name field can be edited and the Work Site Type needs to be selected from the drop down list of options. The name of the requestor will be entered as the default Work Site Administrator, but this can be overridden by selecting the 'REJECT' option button. The dialog will then expand to the following:

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### Work Site Request

WORK SITE NAME  (edit if required)

WORK SITE TYPE

**Administrator Requests** ACCEPT REJECT

Harry van der Vossen

**Administrator Details**

FIRST NAME

LAST NAME

EMAIL

You can then enter the name and e-mail address of the preferred Administrator, allowing you full control to ensure the most appropriate person is appointed.


Finally, in order to approve this Work Site for the Workforce Engagement Survey, click on the  button. The Administrator will receive an acknowledgement e-mail, which will also provide a unique log-in.

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## Adding Company Champions


If you wish to include other individuals in your company as Company Champions, or if you need to pass your role over to someone else, then click on your company name in the top menu and scroll to the 'Champions' section:

**Champions**

Harry van der Vossen	harryvandervossen@atlasknowledge.com	
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**Add Champion**

First Name  Last Name  Email

Here you can add the name and e-mail address of another Champion. If you need to delete any Champions, then click on the associated  button next to the Champion.

## Support Contact Details

For technical support on the Workforce Engagement Survey Tool, please contact the Workforce Engagement Technical Support Team on 0844 217 2121 or via e-mail: [west@atlasknowledge.com](mailto:west@atlasknowledge.com)

**address** 3rd Floor  
The Exchange 2  
62 Market Street  
Aberdeen  
AB11 5PJ

**telephone** 01224 577268  
**fax** 01224 577251

**email** [info@stepchangeinsafety.net](mailto:info@stepchangeinsafety.net)  
**website** [www.stepchangeinsafety.net](http://www.stepchangeinsafety.net)

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