



**EmployeeConnect**  
*Work. Flow. Smarter.*

# Engagement Module

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## Who can access the Engagement Module?

The Engagement module can be accessed by any HR with the Security setting of Admin and Sysadmin.

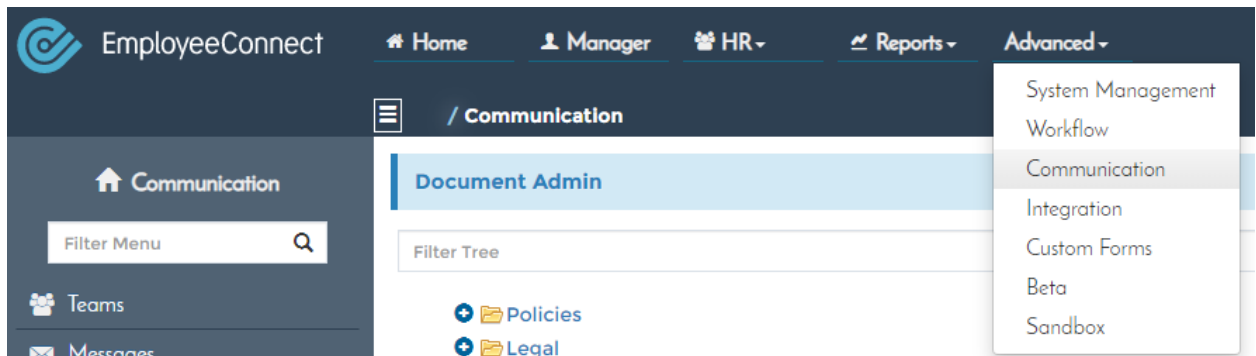
The module can be accessed by navigating to Advanced > Communication from the top menu and clicking Engagement from the side menu. This opens up settings to configure your pulse survey and get you started.

You can select who will receive access to the surveys too after but this is done after setting up all you pillars and surveys, this will be discussed further later In the manual.

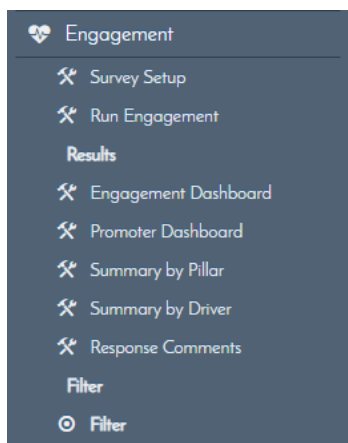
## Navigation

### How to access the Engagement module

1. Click Advanced > Communication from the top menu



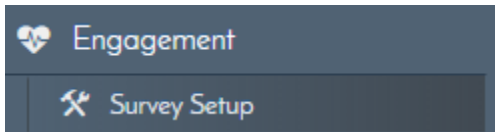
2. Click Engagement from the side menu



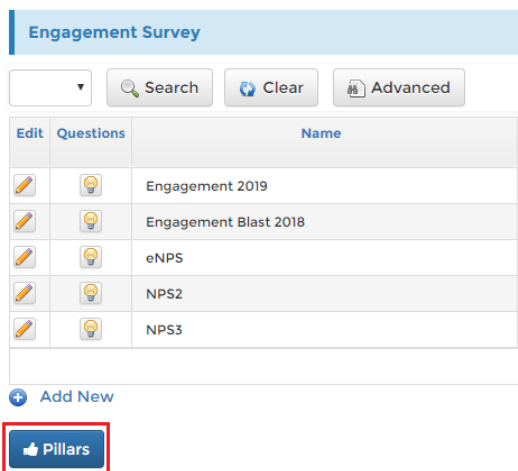
## Survey Setup

### How to setup your Engagement Survey

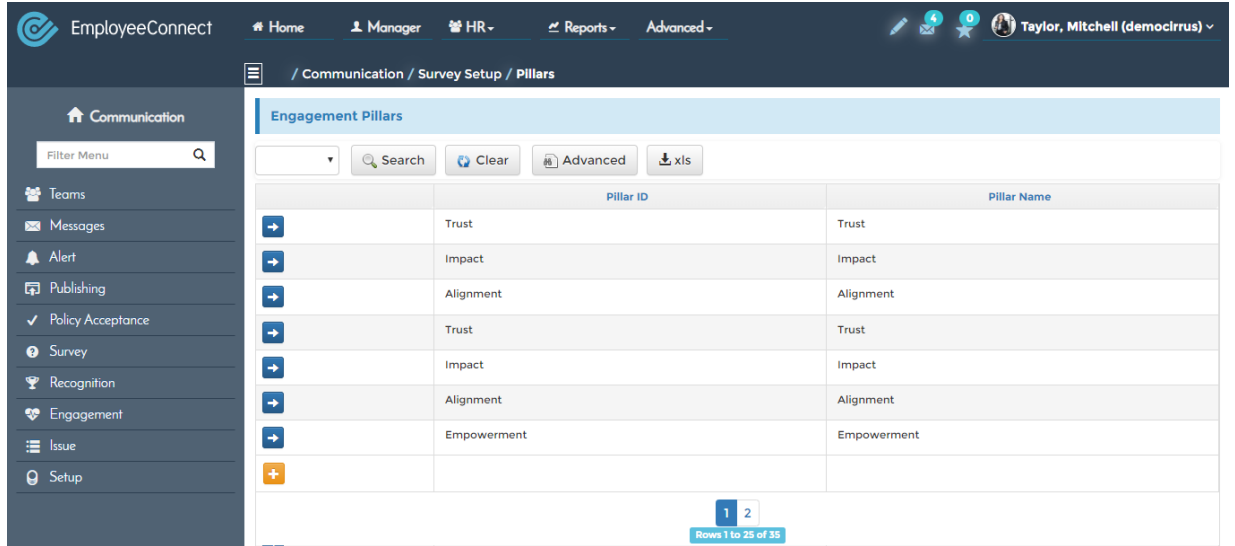
1. Click Engagement > Survey Setup



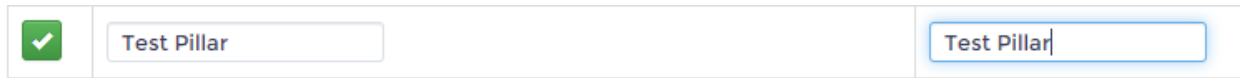
2. Click Pillars



Pillars - Pillars in EmployeeConnect can be the core information you are getting a survey against e.g. Values, Leadership, Safety etc. See the sample below for a screenshot of the pre-defined pillars in the EC Engagement Module.



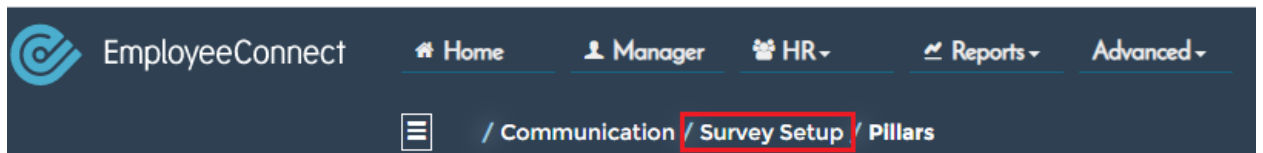
In the sample we can see Trust, Impact, Alignment and Empowerment. This can be configured by clicking the blue arrow button. A new Pillar can be created any time by clicking the + button.



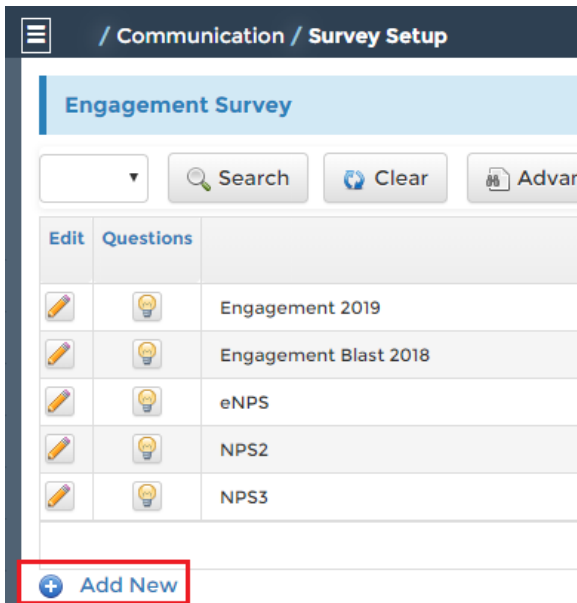
Remember to click the Green button to save your changes.



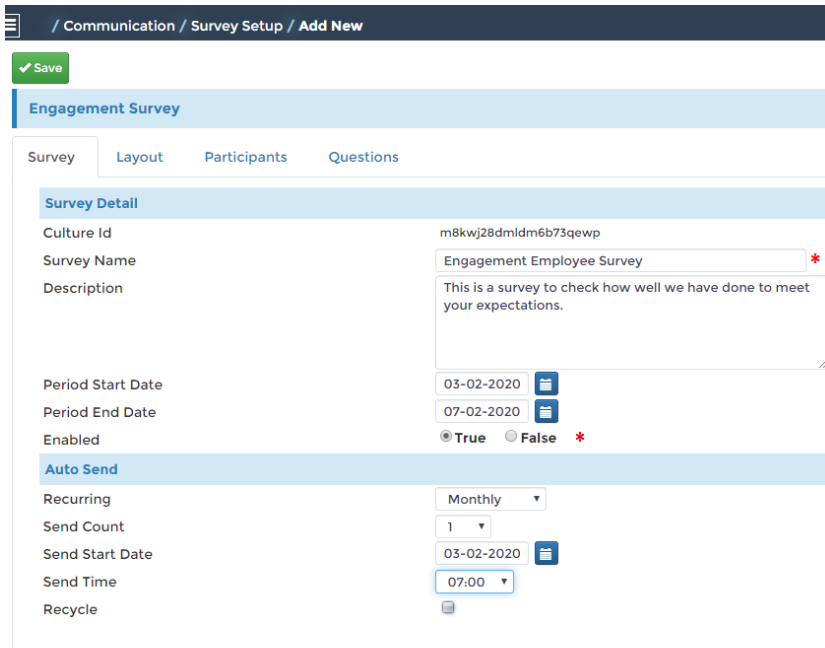
3. You can click on the breadcrumb to access Survey Setup again



4. Click Add New to create a new Survey



5. The Engagement Survey Setup form will be displayed



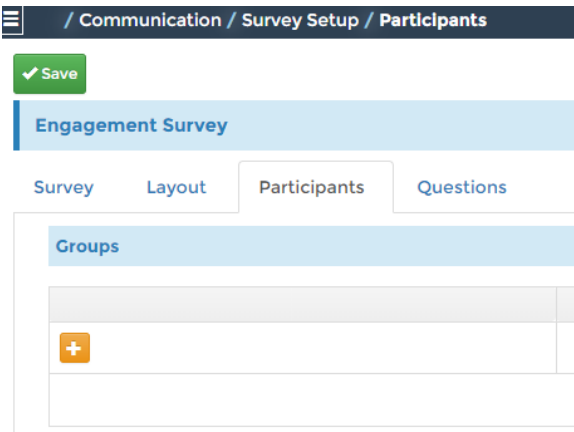
## Engagement Survey Fields

- 5.a Culture id - System generated ID for the survey, no need to modify this field
  - 5.b Survey Name - Survey Name, can be changed
  - 5.c Description - Definition what the survey is for, describe your survey
  - 5.d Period Start Date - Period covered for the survey, period when it starts
  - 5.e Period End Date - Period covered for the survey, period this ends
  - 5.f Enabled - Active or not, true means it is active
  - 5.g Recurring - Select how often the survey is sent, options include daily, fortnightly etc  
Note: if all Auto Send settings are left blank, survey will be sent to all.
  - 5. h Send Count - How many questions to pulse out
  - 5.i Send Start Date - When to start sending the survey
  - 5.j Send Time - When to end and stop sending the survey out
  - 5.k Recycle - will go back to and start the pulse again
6. Setup up your survey fields according to your preference
  7. Click the Layout tab

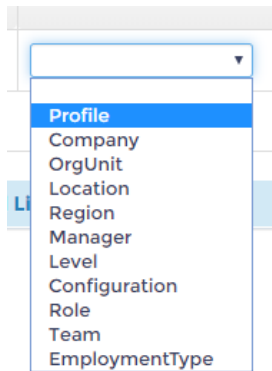
The screenshot displays the 'Layout' configuration page for an engagement survey. The breadcrumb trail at the top indicates the path: / Communication / Survey Setup / Layout. A green 'Save' button is located at the top left. The main heading is 'Engagement Survey', and the 'Layout' tab is selected among 'Survey', 'Participants', and 'Questions'. The 'Survey Instructions' section contains two text boxes: 'Instruction Header' with the text 'Please provide your feedback.' and 'Confirmation Complete' with the text 'Survey Completed... Thanks for your response.'. The 'Email Notification' section includes a 'Subject' field and a 'Body' field. The 'Body' field features a rich text editor toolbar with various formatting options such as bold, italic, underline, font color, font size, text color, bulleted list, numbered list, link, unlink, and source code.

8. Click Save

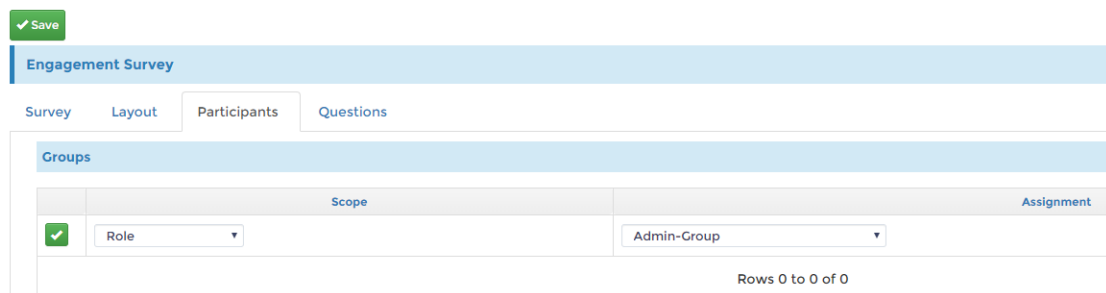
9. Click Participants tab



10. Click the '+' plus button to add a participant, there are several options to select here, groups like company, location, role etc can be selected.



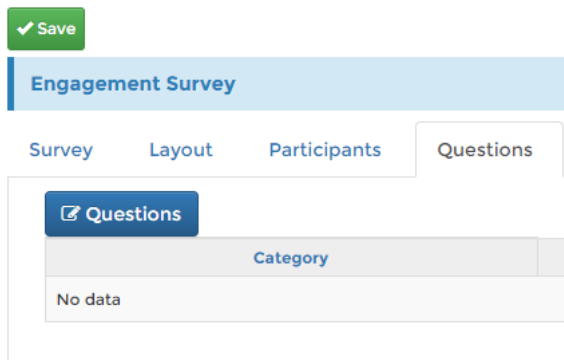
11. Assignment can now be set, see screenshot below



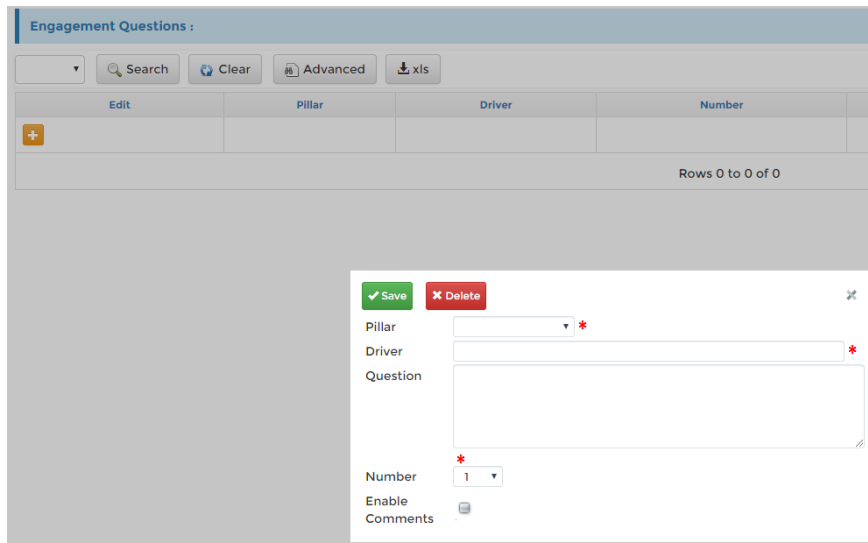
12. Click the Questions tab to set your questions, driver against your pillars



13. Click the Questions button to create from scratch if you have a new survey



14. Click the '+' plus button to create a new question



Select your Pillar, Driver and set your question.

This gives you a way to define the questions in granular detail. Each question can contribute to a driver and the drivers will get a score which will then be given against the pillar.

# Run Engagement

Run Engagement allows you to see all available surveys, active and inactive and choose which to Send out.

## How to Run the Engagement Survey

1. Click Advanced > Communication
2. Click Engagement > Run Engagement

Run	Name	Participant Preview	Start	End	Last Sent
	Engagement Blast 2018	. 13 .	12-02-2018		29-01-2020 16:29
	eNPS	. 12 .	08-02-2018		26-02-2018 00:00
	Manual	. 0 .			

Rows 1 to 3 of 3

3. Click the Run button (blue arrow) to select which engagement to run
4. Click the Send button to send the Survey

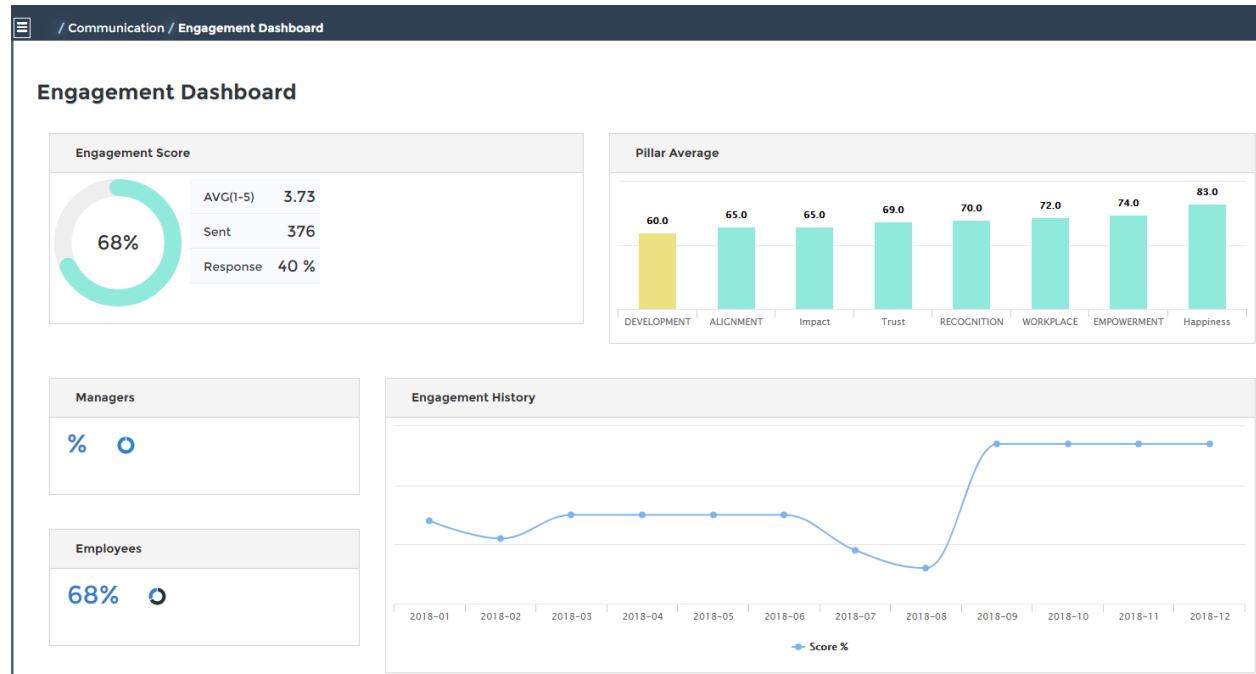
**Engagement Survey : Manual**

Pillar	Driver	
Alignment	Test	

Row

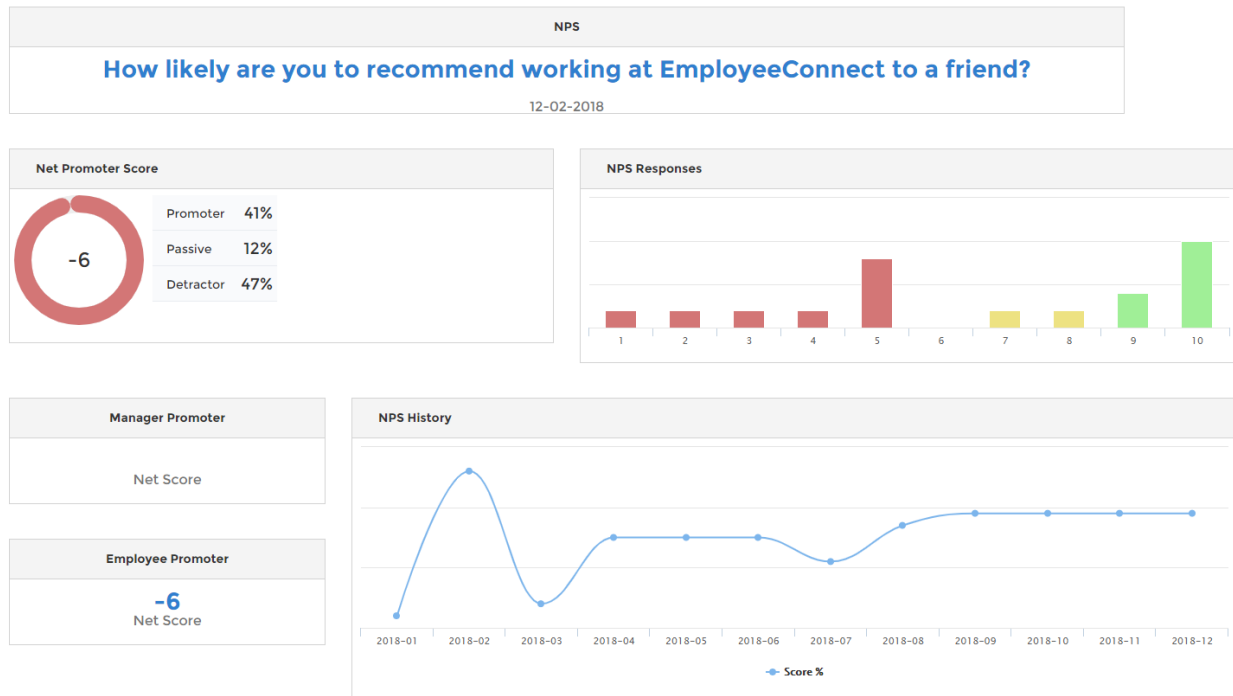
# Engagement Dashboard

The engagement dashboard allows you to view a report of your pulse surveys. This is a good way to see how you are doing based on the surveys you send out. This is interactive, you can click on the data to drill down and see more info, each of the graphs shown here are representative of some data gathered from your surveys.



## Promoter Dashboard

NPS Survey fuel this dashboard showing you a unique method of tracking promotion or your detractors in the workplace. This is a fully interactive dashboard similar to the Engagement Dashboard where the graphs and the data can be clicked or hovered to view and drill down to more details.



## Summary by Pillar

These is one of the reports where you can see all the information about your pillars. Each of the pillars are listed and the related average score is displayed. The table also lists the response rate, score from 1 (Lowest ) - 5 (highest) and the frequency of the answers.

/ Communication / Summary By Pillar								
Summary by Pillar								
<input type="text"/> Search <input type="button" value="Clear"/> <input type="button" value="Advanced"/> <input type="button" value="xls"/>								
Pillar	AVG(1-5) Score	Sent (Response%)	1	2	3	4	5	
ALIGNMENT	3.59	62 (46%)	2	6	5	5	11	
DEVELOPMENT	3.39	36 (50%)	1	2	6	7	2	
EMPOWERMENT	3.95	36 (55%)	0	3	3	6	8	
Happiness	4.33	12 (25%)	0	0	1	0	2	
Impact	3.58	48 (25%)	0	2	2	7	1	
RECOGNITION	3.79	48 (50%)	1	3	3	10	7	
Trust	3.75	62 (19%)	1	1	2	4	4	
WORKPLACE	3.86	72 (50%)	2	4	4	13	13	

Rows 1 to 8 of 8

You may click on the Driver average score to drill down and see all the contributing scores.

Summary by Driver								
<input type="text"/> Search <input type="button" value="Clear"/> <input type="button" value="Advanced"/> <input type="button" value="xls"/>								
Pillar	Driver	AVG(1-5) Score	Sent (Response)	1	2	3	4	5
ALIGNMENT	Accomplishment	4.00	12 (25%)	0	0	1	1	1
Alignment	Alignment	3.43	12 (58%)	1	1	1	2	2
ALIGNMENT	Goals	4.29	12 (58%)	0	0	2	1	4
ALIGNMENT	Purpose	2.40	14 (35%)	0	4	0	1	0
Alignment	Satisfaction	3.71	12 (58%)	1	1	1	0	4

Rows 1 to 5 of 5

## Summary by Driver

These is one of the reports where you can see all the information about your Drivers. Each of the Drivers are listed and the related average score is displayed. The table also lists the response rate, score from 1 (Lowest ) - 5 (highest) and the frequency of the answers.

/ Communication / Summary By Driver

Summary by Driver

Search Clear Advanced xls

Pillar	Driver	AVG(1-5) Score	Sent (Response)	1	2	3	4	5
ALIGNMENT	Accomplishment	4.00	12 (25%)	0	0	1	1	1
Alignment	Alignment	3.43	12 (58%)	1	1	1	2	2
ALIGNMENT	Goals	4.29	12 (58%)	0	0	2	1	4
ALIGNMENT	Purpose	2.40	14 (35%)	0	4	0	1	0
Alignment	Satisfaction	3.71	12 (58%)	1	1	1	0	4
DEVELOPMENT	Development	3.67	12 (50%)	0	1	1	3	1
DEVELOPMENT	Growth	3.33	12 (50%)	1	0	2	2	1
DEVELOPMENT	Learning	3.17	12 (50%)	0	1	3	2	0
EMPOWERMENT	Autonomy	3.86	12 (58%)	0	2	0	2	3
Empowerment	Motivation	4.29	12 (58%)	0	0	2	1	4

## Response by Comments

This report shows all the response, everything in your survey can be seen here like a catch all report for all the comments.

/ Communication / Response Comments									
Comments									
<input type="text" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Advanced"/> <input type="button" value="xls"/>									
Pillar	Driver	Answer	Comments	Sent	OrgUnit	Location	Region	Survey	
ALIGNMENT	Goals	3		26-02-2019 15:24				Engagement Blast 2018	
ALIGNMENT	Goals	5		26-02-2019 15:24				Engagement Blast 2018	
ALIGNMENT	Goals	3		26-02-2019 15:24				Engagement Blast 2018	
ALIGNMENT	Goals	5		26-02-2019 15:24				Engagement Blast 2018	
ALIGNMENT	Goals	4		26-02-2019 15:24				Engagement Blast 2018	
ALIGNMENT	Goals	5		26-02-2019 15:24				Engagement Blast 2018	
ALIGNMENT	Goals	5		26-02-2019 15:24				Engagement Blast 2018	
Alignment	Alignment	2		26-02-2019 15:24				Engagement Blast 2018	
Alignment	Alignment	4		26-02-2019 15:24				Engagement Blast 2018	
Alignment	Alignment	1		26-02-2019 15:24				Engagement Blast 2018	
Alignment	Alignment	4		26-02-2019 15:24				Engagement Blast 2018	
Alignment	Alignment	3		26-02-2019 15:24				Engagement Blast 2018	

## Filter

Filter allows you to pick which engagement survey to display and limit all info on that engagement only. All the Engagement Surveys you saved will be listed on the filter picklist as seen below.

/ Communication / Filter	
<input type="button" value="Save"/>	
<b>Menu Filter</b>	
Engagement	<input type="text" value="Engagement"/>
<input type="button" value="Refresh"/>	<div style="border: 1px solid #ccc; padding: 5px;"> <ul style="list-style-type: none"> <li>Engagement 2019</li> <li>Engagement Blast 2018</li> <li>eNPS</li> <li>Manual</li> <li>NPS2</li> <li>NPS3</li> <li>Test delete me</li> </ul> </div>