Distributing and Inviting Participants to Surveys in Eval25
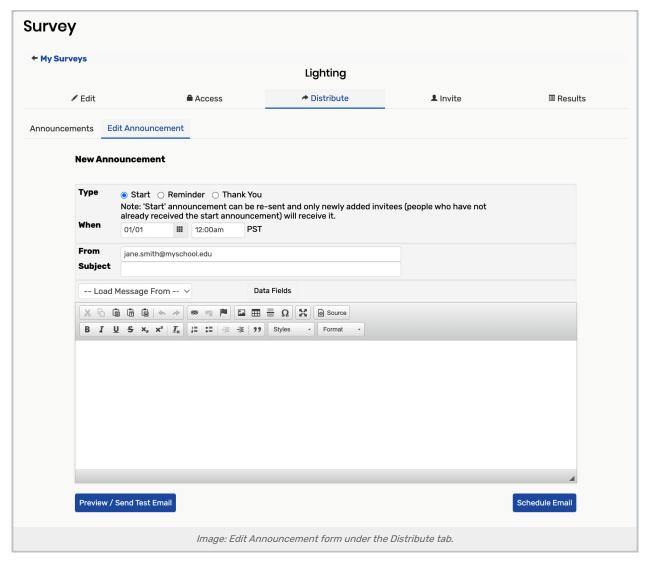
⊕ **Click here to view related articles.**

Once a survey is created and ready for participants, the next step is to make it available. This can be managed from a survey, or from the list of surveys through announcements. Surveys can be distributed to participants or made available via invitation. When a survey is distributed, an announcement can be created or copied and edited, to go with the distribution email.

In This Article:

- Create a New Survey Announcement
- Invite Survey Participants

Create a New Survey Announcement

1. Select a Survey to Distribute

- Select a survey from the Survey tab in Eval25
- Click the **Distribute** tab above the survey

2. Used the Editor to Format the Announcement

- Click the **Edit Announcement** sub-tab

Image: Edit Announcement form under the Distribute tab.

- Fill out the announcement fields:
  - **Type**: The type of announcement that will be sent
    - **Start** - The first announcement sent for survey completion.
      - **Note**: Survey Announcements allow no more than one setup for a start announcement. You can re-send a start announcement that will be sent to only newly added invitees. Users who have already received the start announcement will not receive it a second time
    - **Reminder** - The reminder announcement for survey completion.
    - **Thank You** - The recipient has completed the survey. This email occurs automatically upon survey completion.
  - **When**: Used to schedule the date and time to send the announcement.
  - **From:** Indicates the sender of the survey announcement. It may be pre-populated with an email address.
  - **Subject:** The announcement subject line. Best practice is to include the survey name.
  - **Load Message From:** Allows you to enter any email addresses that had been previously entered into this field.

- **Data Fields**: Contains properties that can be entered into the announcement. The properties include the following:

    - *survey.anonymous.url*

    - *survey.individual.url*

    - *survey.title*

    - *user.firstname*

    - *user.lastname*

- Use the icons on the formatting toolbar to customize the announcement. You can copy, paste, utilize preset text formats, as well as add numbers, bullets, images (see below), lines, links, and indentations.

> **Note: Adding Images to an Announcement**
>
> 1. Click **Image** on the toolbar and open the **Image Properties** box.
> 2. On the **Image Info** tab, enter the URL containing the image to display in the announcement.
> 3. If there is a need for text to display when the mouse hovers over the image, enter it in the **Alternate Text** field.
> 4. In pixels, enter the image's desired width, height, border size, horizontal space from text, and vertical space from text.
> 5. Set the image's alignment at left or right.
> 6. Examine the image and its placement in the **Preview** box, and when ready click the **OK** button.

3. (Optional) View and Edit the HTML

- Click **Source** to view the announcement as HTML.

4. Preview and Schedule

- Click **Preview/Send Test Email** to set up a test email sent to you.
- Click **Schedule Email** once the announcement is complete and ready to send, as scheduled in step 5b.

Invite Survey Participants

1. Select a Survey

- From My Surveys, select a survey in creation or edit mode.

2. Choose Users to Invite

- Click the **Invite** tab.
- Click the Settings (⚙) button.
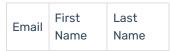- Select one of the following from the dropdown list:

- Add Participants:
  - Enter the email, first name and last name of participants to invite
  - Use the plus and minus buttons to increase or reduce the amount of rows
  - Click **Add** after selecting your users
  - Click the **Close** button when you are ready to continue
- **Upload Participants**: Browse and select a properly formatted Excel file of participants (see Note below), then click **Open**.
  - **Note**: The first row of the Excel file must include the field names in this exact order:

Email	First Name	Last Name

  - All fields are required. Emails should be unique.
- **Course Students**: Click this option and select the names of students to invite to participate in the survey.