

# Using a Panel to Distribute a Survey in Qualtrics



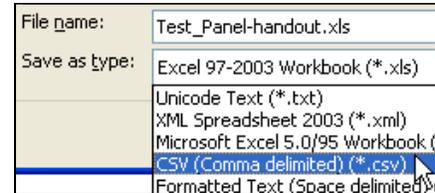
## Creating and Importing a Panel to Qualtrics

Create a three column spreadsheet in Microsoft Excel. This spreadsheet should include a header row with a label for each column. Your column headings must include: Last Name, First Name, and Email for each intended recipient.

	A	B	C
1	Last Name	First Name	Email
2	Henningson	Randy	henningr@kean.edu
3	Cronin	Joe	jcronin@exchange.kean.edu

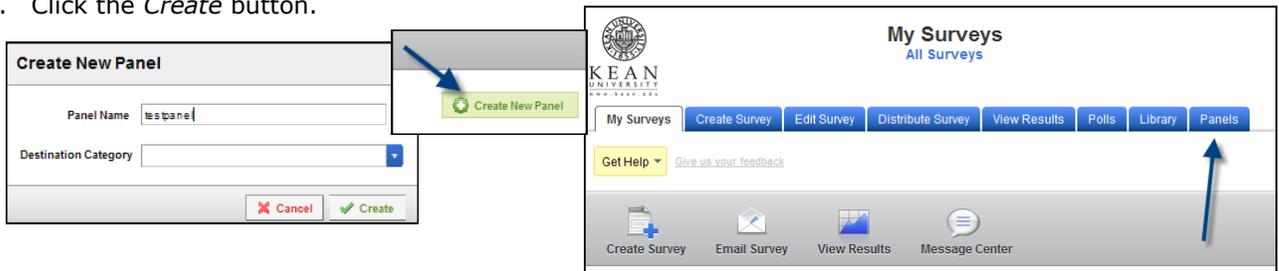
- **Save your spreadsheet in .CSV format from MS Excel.**

1. Open your spreadsheet of recipients which you created (following the guidelines above) in MS Excel.
2. Click the *Office Button* (MS Excel 2007), Click on *Save As*
3. In the Save as Dialog box, select .csv (comma delimited) from the file type drop down box.
4. You will see a box warning that some features may be lost, click Yes to continue.



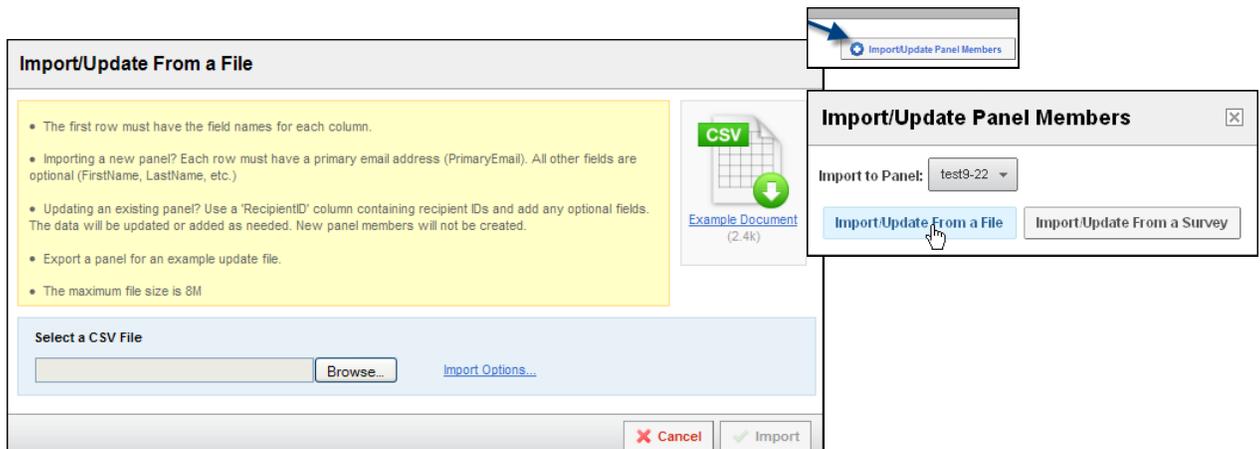
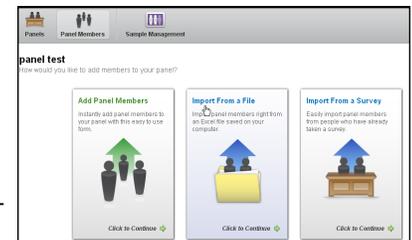
- **Create a new Panel in Qualtrics.**

1. Log in to Qualtrics.
2. Click on the *Panels* tab.
3. Click the *Create New Panel* button in the *Panels* window.
4. Name your new Panel.
5. Click the *Create* button.

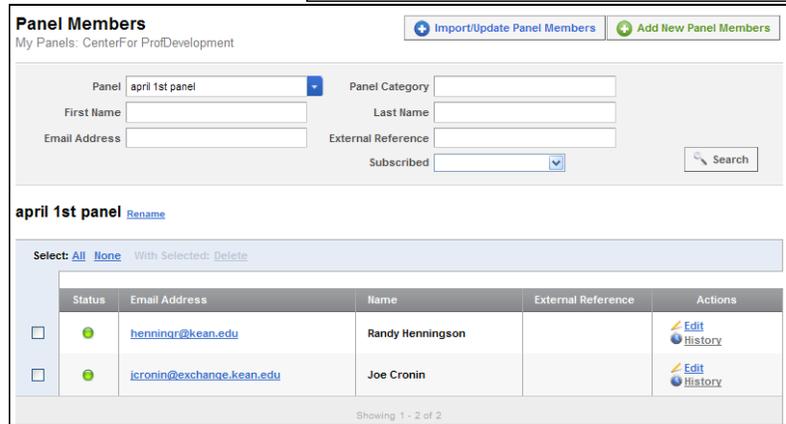


- **Import your .csv file of Panel members.**

1. In the initial *Panel Members* window, click the large center button labeled *Import From a File*.
2. Browse your computer for the .csv file containing your panel members. Click *Open* in the browse box.
3. Confirm the email column in the preview has the heading **Email**, if it does not, you will see a red warning box. Select the heading "Email" from the drop down box above the column containing email addresses.



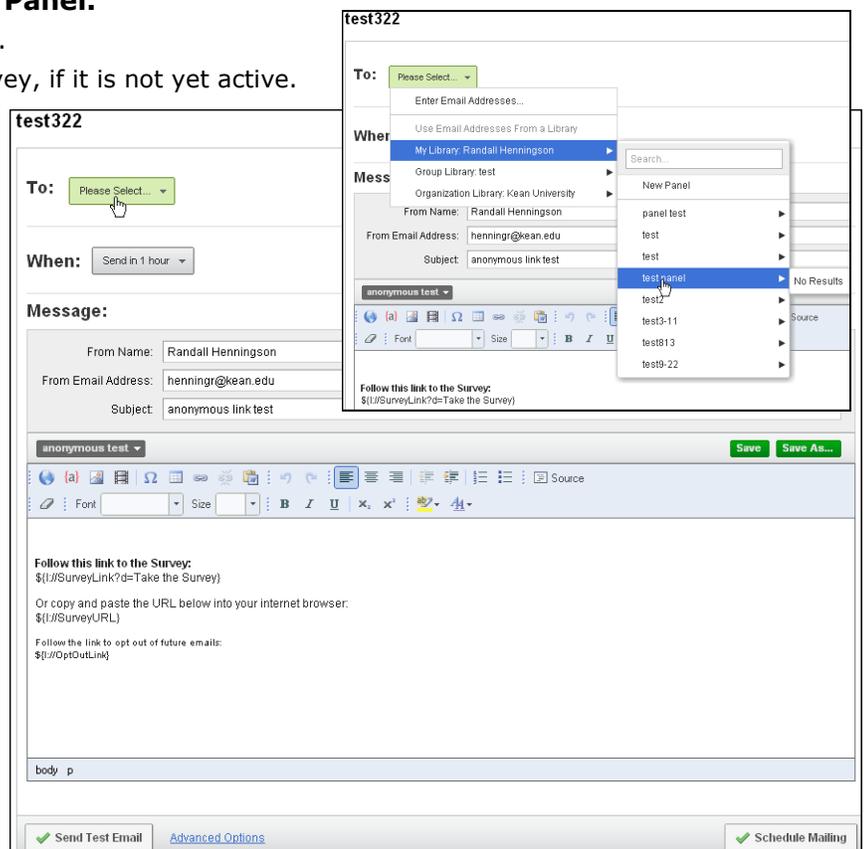
- **Import your .csv file of Panel members. (cont'd)**
  4. Click *Import*.
  5. Click *Close* in the successful import confirmation box.
  6. The Panel Members window will now be displayed. This window will list the name of your panel and list all the members of the panel in the lower portion of the window.



## Distribute your Survey using a Panel and the Survey Mailer function

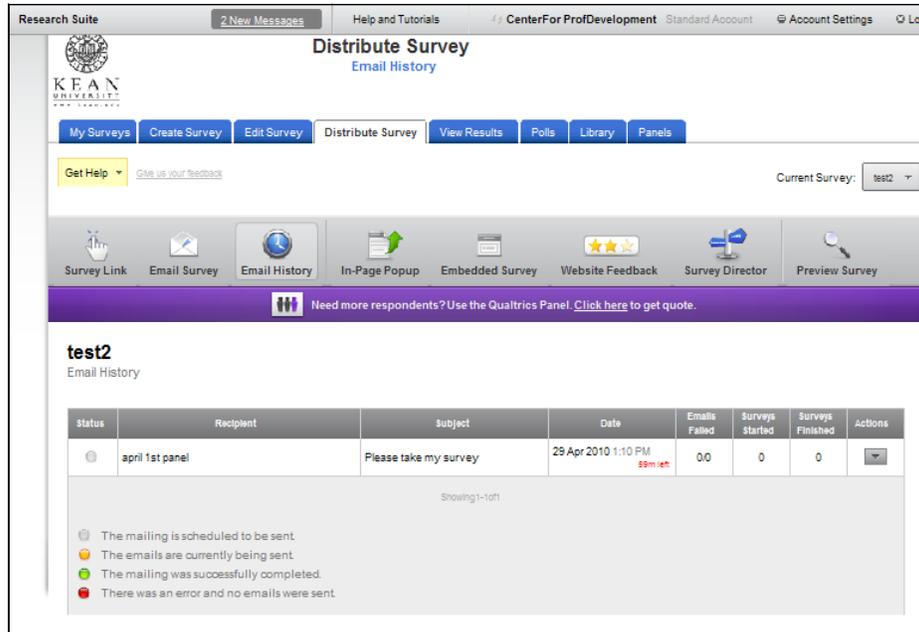
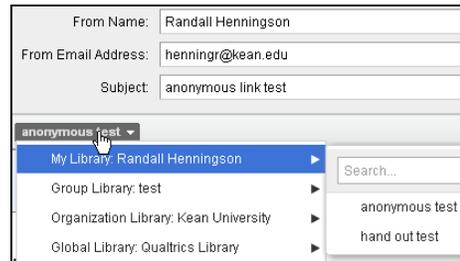
Use your imported Panel and Qualtrics Survey Mailer function to distribute your survey to thousands of potential respondents. The Survey Mailer function allows scheduled mailing and tracking of large groups of messages, with a small number of steps.

- **Distribute your survey using a Panel.**
  1. Click on the *Distribute Survey* tab.
  2. Click the link to activate your survey, if it is not yet active.
  3. Click on the *Email Survey* button.
  4. Choose recipients by clicking the button after the word *To*:
  5. Select a time to send the emails.
  6. Select the Library where your panel is located, and the name of your Panel from the fly out menu that appears.
  7. Select a time to send the emails, by clicking the button after the word *When*:
  8. Update the *From* and *Subject* information as necessary.
  9. Enter your message text in the top portion of the message box. (You must retain the six lines of text and coded links beneath your message)



• **Distribute your survey using a Panel. (cont'd)**

8. If you wish to use a saved message from a Library, click the dark grey button (under the Subject line label) to see the Library menu.
9. Select your Library from the drop down list that is displayed. A fly out menu will appear showing available message names.
10. Click the *Schedule Mailing* button



**Use the *Email History* window to track the progress of your mailing.**

Once you click the *Schedule Mailing* button (see above), you will be taken to the *Email History* window. From here you may edit or delete your distribution. In addition you can schedule automatic reminders and thank-yous, as well as, track the response volume to your survey.

• **Return to Email History to monitor the response rate for your survey.**

1. Click the *Distribute Survey* link.
2. Click the *Email History* button.
3. The colored circles indicate the status of your mailing. (See legend in lower left)
4. Toward the right side of the table you may find information on Emails Failed, Surveys Started, and Surveys Finished.

