

Qualtrics Offline Surveys At UNC

Getting the App

The Qualtrics Offline Surveys app is compatible with Apple devices using iOS 5.1 or later, and Android 4 and above. At this time it is not compatible with any other operating systems. (If you are unsure whether your iOS device is capable of running iOS 5.1, you may wish to consult the table found at http://en.wikipedia.org/wiki/List_of_iOS_devices .)

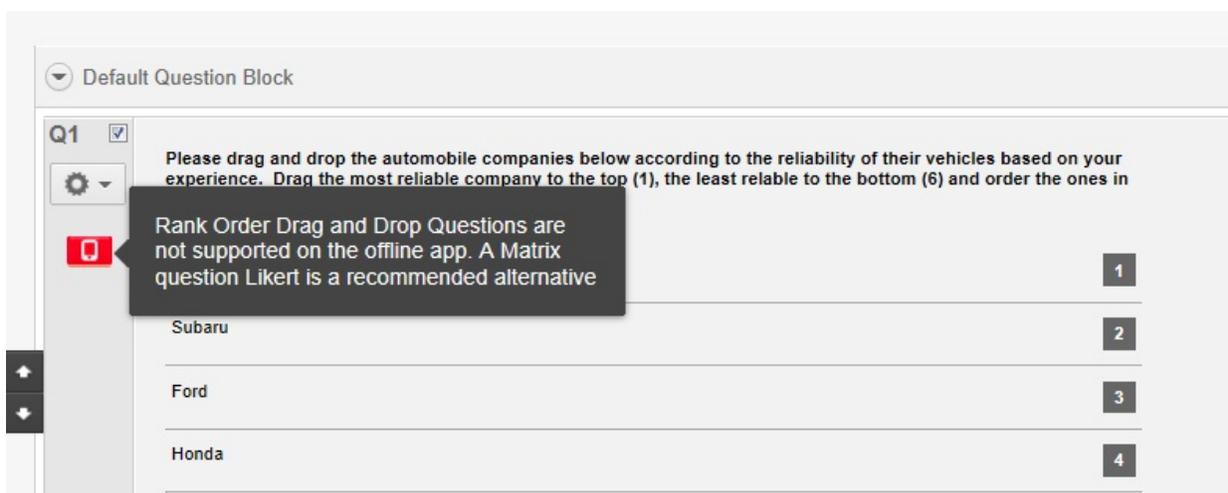
Download and install the Qualtrics Offline Surveys app (for free) from the iTunes App Store for the iPad or iPhone, or from the Google Play Store for Android devices. You will find it by searching for “Qualtrics Surveys”. Or, if you prefer, you can download the Qualtrics Offline Surveys app to your device here: [iPad & iPhone](#) | [Android Tablets & Smartphones](#).

NOTE: Screen images in this document were taken from an iPad. The application may look slightly different on other devices.

Preparation

Before attempting to load a survey onto your mobile device, you should do three things.

1. Make sure you know your UNC PID. If not, look it up here: <http://www.pid.unc.edu/PIDLookup>
2. On a computer (not mobile device) enter Edit mode for the survey you plan to use offline. Under the “Advanced Options” dropdown on the right side near the top, make sure that Mobile Compatibility Advisor is checked. Carefully scroll through your survey, watching for red or orange mobile device icons on the left side. Red indicates the question is not mobile compatible. Orange indicates the question is mobile compatible, but could be revised to function better on mobile devices. Revise any items as needed.

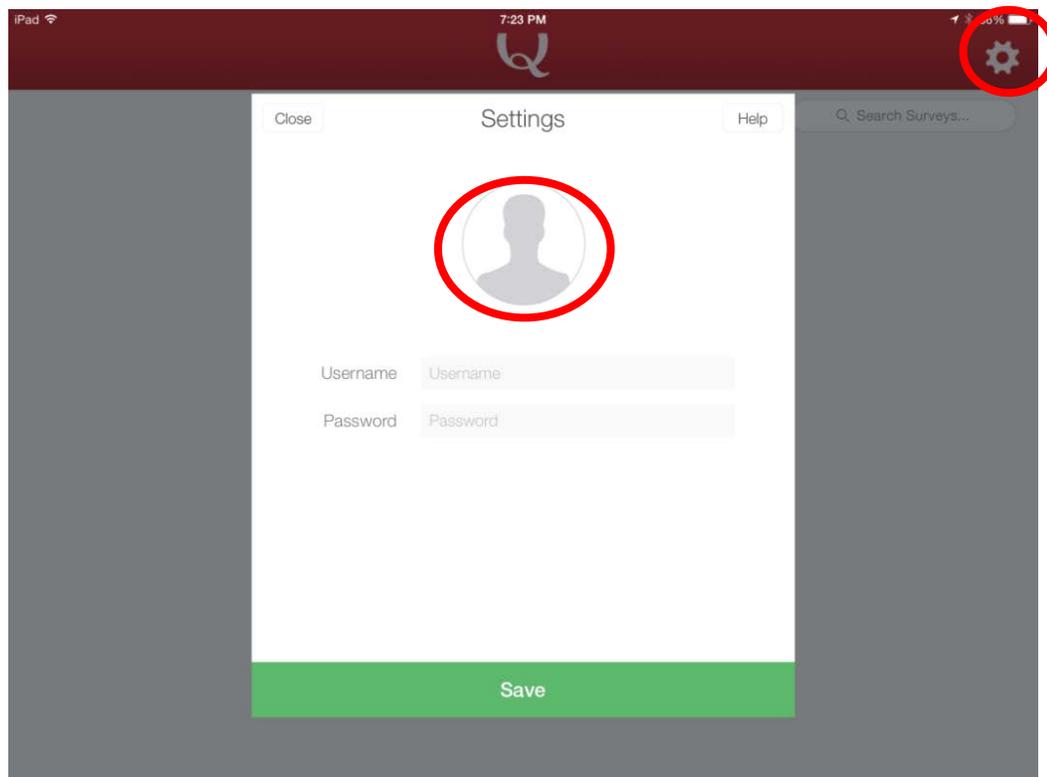


3. Generate an **API Token** which will be needed to log in on the mobile device. While logged into your Qualtrics account on a computer, click your name in the top right corner of the screen and select **Account Settings**. On the row of icons, click **Qualtrics IDs** and look at the **API** box. Click **Generate Token** which will generate a long string of characters next to the word Token. You will need this long string to log in on your mobile device. You may wish to email it to yourself if the mobile device receives email.

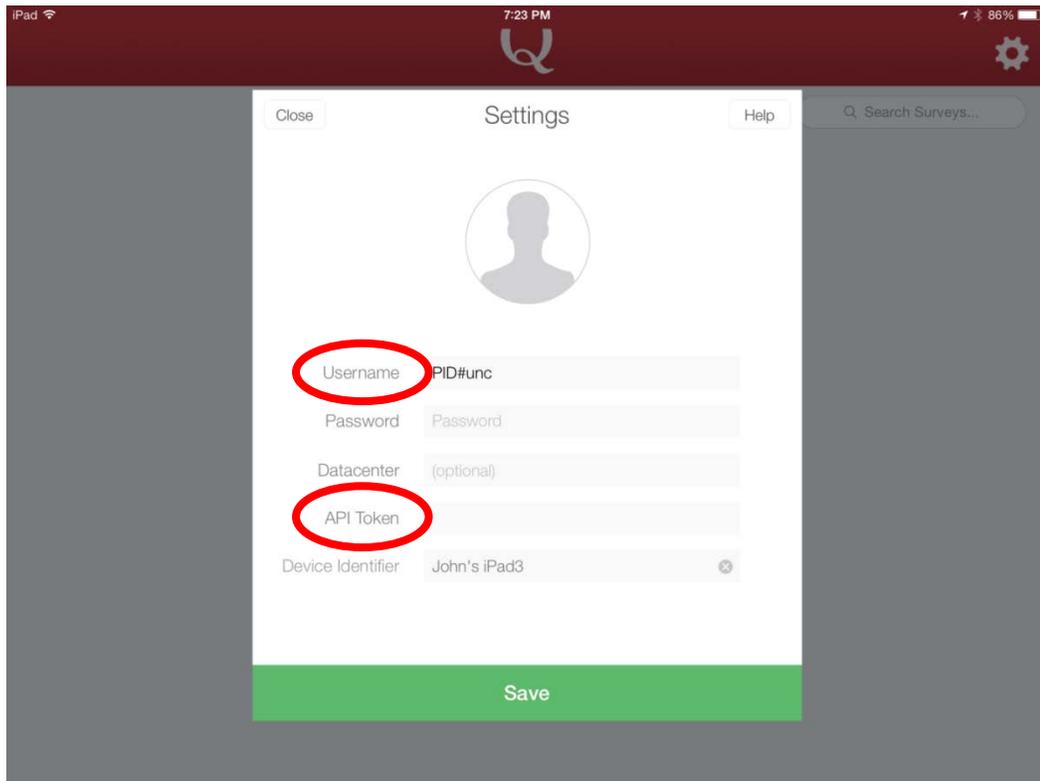
Logging in to the App

Because UNC uses single signon to access Qualtrics accounts, the steps for logging in to the app are different than the standard login. Once you log in to the app as described below, **DO NOT EVER LOG OUT! If you log out while there are completed surveys stored on your device, they will be deleted and are unrecoverable!**

1. Open the Qualtrics app. You may be taken immediately to the log in screen. If not, tap the **grey cog symbol** (Settings) to bring it up.
2. **Double tap** on the blank **user picture** to view hidden fields.

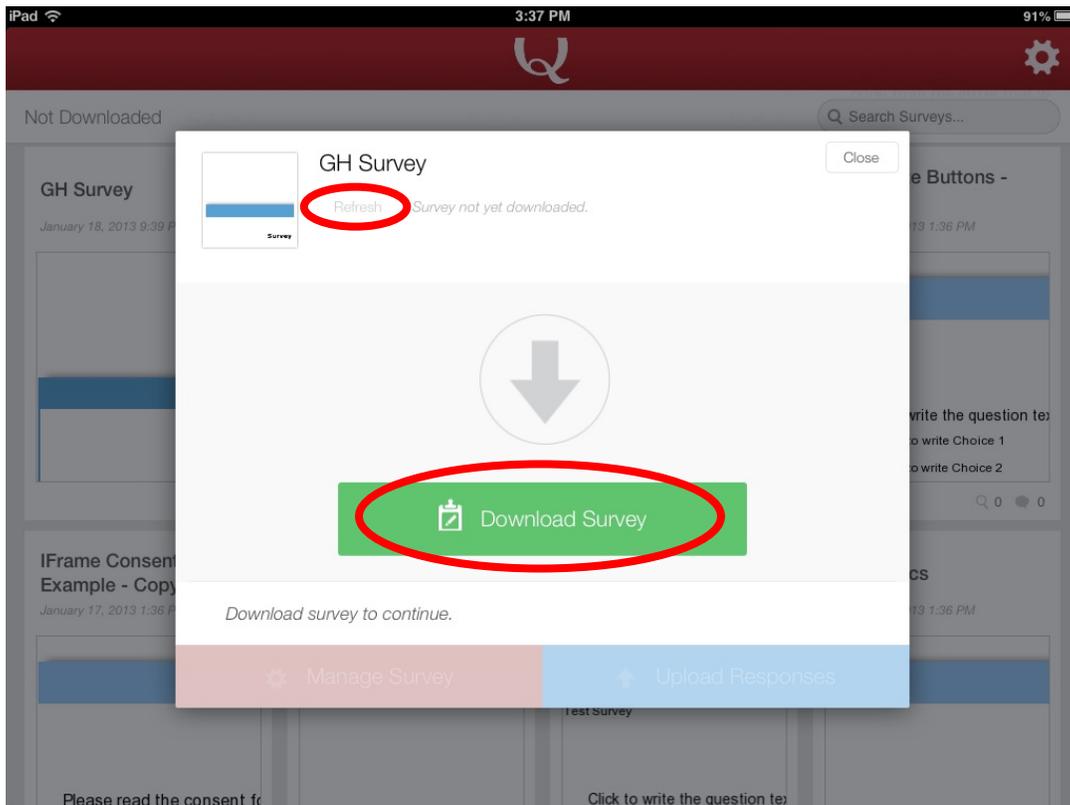


3. Your username is the combination of your **PID** plus the **#** symbol plus **unc** (example: **7123456789#unc**).
4. Leave the password field blank and leave the Datacenter field blank
5. Enter the API token you generated online in the **Qualtrics IDs section** of your Qualtrics account. If your mobile device can receive email, it is easier to send yourself the API Token via email and cut and paste it into the API Token field.



Loading the Survey Instrument

Your mobile device will need internet access for this step. Upon logging in to the mobile device using the steps above, you will see a list of the surveys in your Qualtrics account. Tap the one you want to load onto your mobile device, then tap **Download Survey**.



If your survey contains question types that are not compatible with the offline app, you will see a pop-up box advising you of this, and the survey will not download.

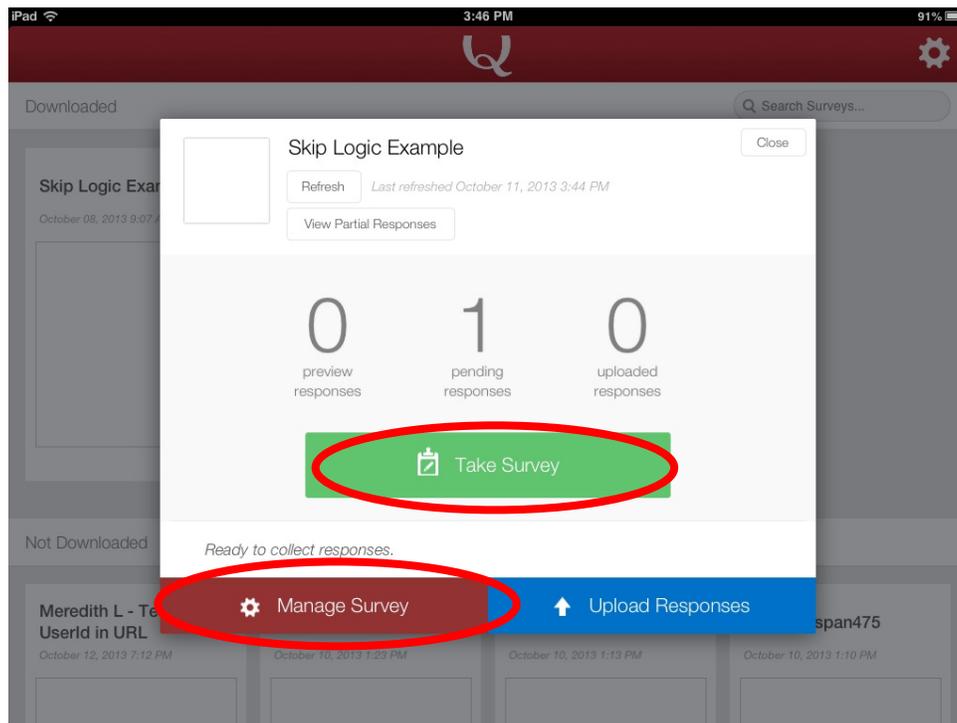
Once the survey has downloaded, you are ready to conduct surveys offline. **BUT DO NOT LOG OUT OF THE DEVICE**, even when you are done using it for the day. If you log out, it will remove all the survey data stored on the device, along with the survey instrument itself. You will have to repeat the login and loading steps above to use the app again.

Feel free to log in to the same Qualtrics account from multiple devices. Responses collected on each mobile device will all be uploaded back to the same survey.

If there are edits to the survey online that need to be brought onto the mobile device, make sure your device is connected to the internet and tap the survey name and then tap **Refresh**.

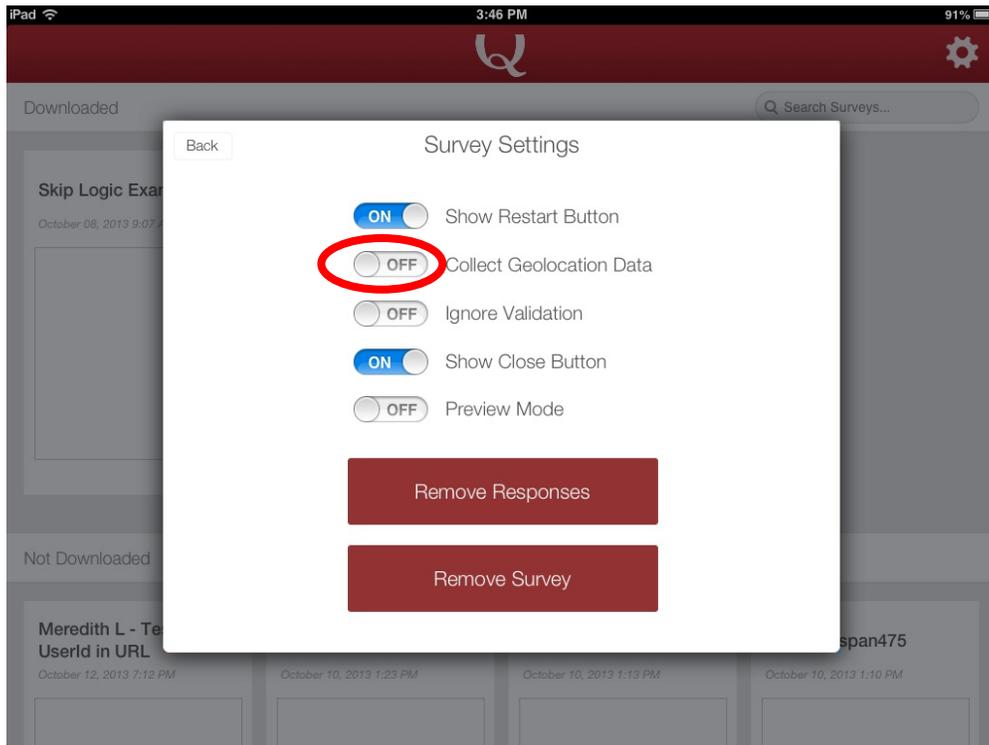
Collecting Data

Tap the survey instrument you wish to use, then tap **Take Survey**.

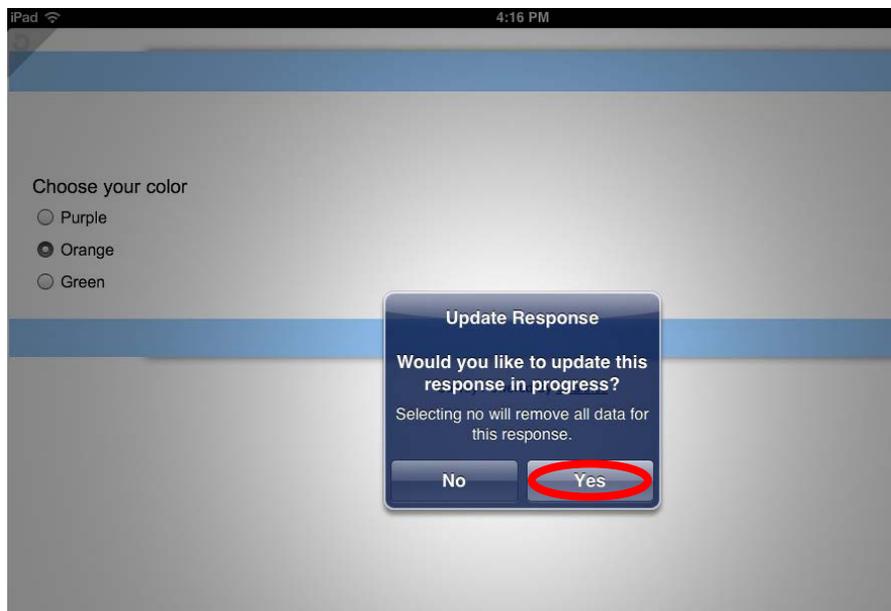


Surveys on your mobile device will function similarly to surveys on a full-size computer, but question layout may be changed slightly to accommodate the smaller screen size. For example, some mobile devices will show a selection box as a drop-down list.

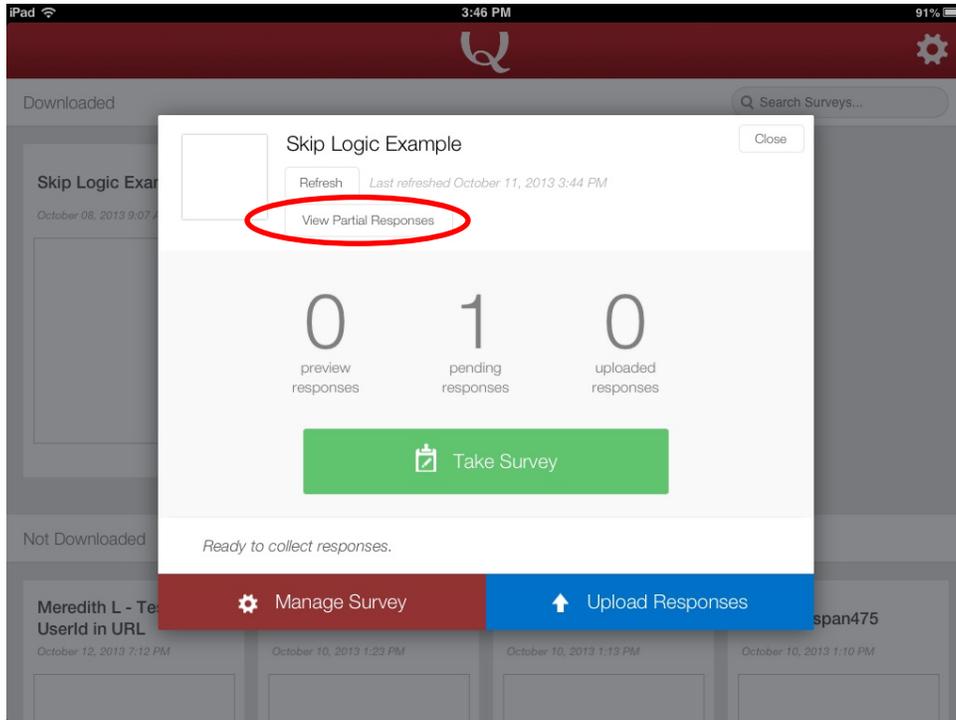
A few settings are available by tapping **Manage**. Unless you need to collect geolocation data, you may wish to turn off **Collect Geolocation Data** to prevent a pop-up warning message at the start of each survey. See Qualtrics help link below for details on the other settings under Manage.



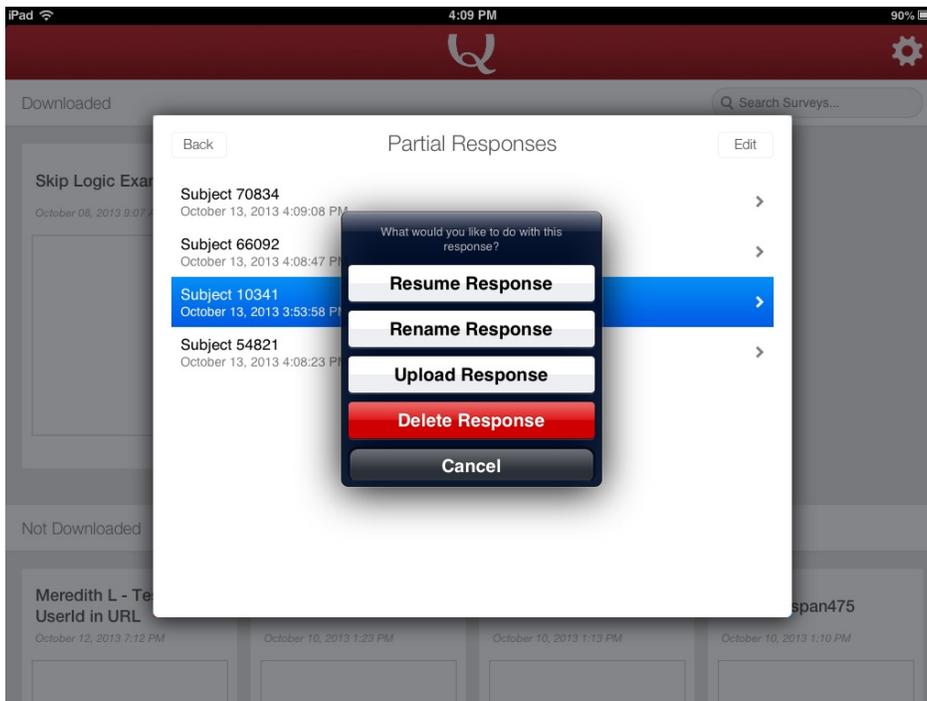
If you close the survey before completing it, an **Update Response** message will appear, asking “Would you like to update this response in progress?” To save the data you have collected, you must choose Yes. You will then be asked to provide a descriptor for this case so that you can recognize it later.



To resume a survey that was broken off (or to see a list of partial responses saved on your device), Tap **View Partial Responses** (on some devices, this is labeled **Saved Responses**).

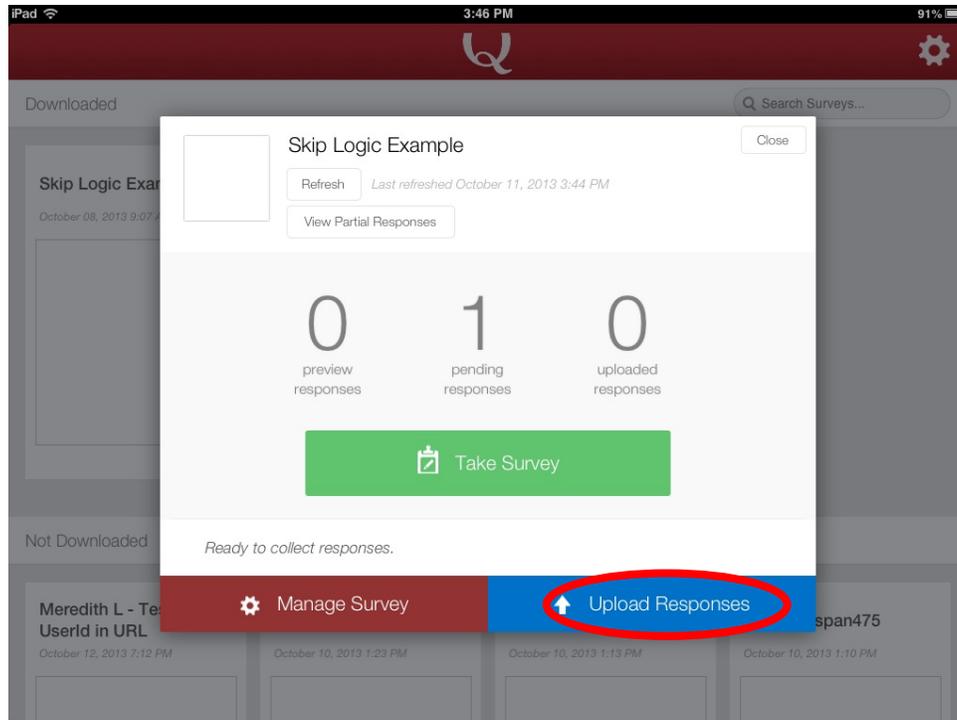


Tap on a case to see options to resume the survey, delete it, upload it (if you will not be completing the interview but want the partial case included in your dataset), etc.



Uploading Data

To minimize risk of data loss, upload completed surveys as soon as possible when you regain access to the internet. Tap **Upload** and all completed surveys will be uploaded to the Qualtrics survey and visible when you log into your account on a computer. **When a completed case is uploaded, it is removed from your mobile device.** Do not be alarmed that the number of completed responses changes to zero after uploading.



Partial surveys stored on your mobile device are **not** uploaded; they remain on the device so that you can re-open and complete them. If you want to upload a partial case and remove it from your device, tap **View Partial Responses** (labeled **Saved Responses** on some devices), tap on the case, and tap **Upload** on the menu that opens.

Additional Resource:

Qualtrics video tutorial and additional help Information can be found at:

<http://www.qualtrics.com/university/researchsuite/distributing/more-distribution-methods/qualtrics-offline-surveys/>