



Overview & Key Points for using the Qualtrics app for Offline Data Collection

One-time set-up of Qualtrics app on device (not AER's)

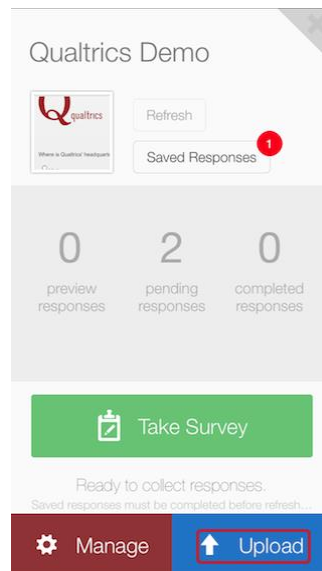
1. Download the Qualtrics Surveys app on the device. →
 - a. You do not need AER to do so, but you may need your Apple ID to download a new app on any Apple product.
2. Log into the account created specifically for your department to administer surveys via the app, usually using a department's group email address.



Adding survey to device

In order to add a specific survey to a device, the owner of the project (typically the assessment liaison) will log into their account on any computer and collaborate (share) the project with the departmental user account. Make sure that the permissions *view reports and distribute the survey* are both checked.

Individual survey's main menu



Preparing ahead of time (while connected to the internet)

1. The app will typically stay logged in, but if you get a login screen, log into Qualtrics using the specific account, as noted above.
2. Find the survey you are using and ensure that the survey has been downloaded.
3. In the Manage section of the survey:
 - a. Turn *off* "Collect Geolocation Data" (typically), unless you do want geolocation data AND have the location setting enabled for the device itself (e.g., the "Settings" app for iPads / iPhones).
 - b. Generally, leave on the close and restart buttons, rather than using kiosk function. Kiosk function would be useful for a device that is left somewhere, as it will automatically restart the survey after a period of inactivity, but it is less useful if staff are present to manage the devices.

Collecting Responses

Note that the data collection process is the same whether or not you are connected to the internet.

1. Tap on "Take Survey."
2. At the end of the survey, click on either the X on the top right corner (to go back to the survey's main menu) or the "Restart" button to take the survey again.
3. You can click on the X on the top right corner at any time to go back to the survey's main menu. However, if you have opened/started a new survey, you will be asked to name the partial response. You must do so in order to proceed.
4. If you want to resume collecting a response for a partial response, access that specific response from the "Saved Responses" button of the survey's main menu and then select the action "Resume."

After data collection (while connected to the internet)

1. If there are still partial responses (as indicated in the "Saved Responses" section of survey's main menu), decide what to do with them.
 - a. Delete any "responses" that are completely blank and just from having restarted the survey when you didn't need to collect additional responses.
 - b. Upload any partial responses for which you will not be finishing but which you do want to include in your results. This option will then add it to the count of Pending responses.
2. Upload your Pending Responses by clicking on the blue button on the bottom right of the survey's main menu.
 - a. Note that uploads are always performed on a "per request" basis, meaning the app will never automatically upload responses on your behalf.

Additional notes

- If you are administering a longer survey and/or a survey to a defined group of participants (e.g., the students in a course), then you may find it useful to use the function to save partial responses. Name the response something meaningful so that you can go back to the correct response when the respondent is going to finish it.
- There are options to have responses *not* be anonymous, but the uses for this feature are rare and would need to be discussed with AER in depth.
- There are survey settings that are not compatible with the app. If your survey involves more than just basic question types and display logic, please review the list of incompatible features on the support site [here](#).