



**BC Centre for Disease Control**  
Provincial Health Services Authority

# Pathways to STBBI Care in BC Corrections

## Qualtrics Offline Tablet Set-up Manual

\*STBBI – sexually transmitted & blood borne infection, such as HIV, hepatitis C, syphilis, chlamydia, gonorrhea.

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### About Qualtrics Offline



Qualtrics Offline Surveys is a downloadable application available for iOS and Android that allows you to administer surveys on your mobile device or tablet without an internet connection. Responses can be collected in the field on your device and then uploaded back into Qualtrics as soon as you have an internet connection.

This app is available for iPad, iPhone, and Android tablets and smartphones. Below is an image of the app you will want to download:



**Qtip:** Qualtrics Offline Surveys is an add-on feature for your Qualtrics license and will need to be enabled before you can use the app. Check with your Qualtrics representative to see if this feature is already included in your license.

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## Getting Started

Before you can get started, you will need to make sure you have permission to use the app. If you are unsure if your account has access to the app, you may want to contact your [Brand Administrator](#) to make sure the **Use Offline Mobile App** and **Access API [permissions](#)** are enabled for your account.

Once your account has the right permissions, there are a couple of steps you'll need to go through to set up the app on your device:

1. [Generate an API token](#).
2. [Download the app](#) (free).
3. [Enter your account credentials](#).

You should also be sure your device is compatible with the app. Because of the sensitive nature of the data recorded on the app, **we require that your device**

- runs iOS 9.0 or later or Android 4.4 or greater (mobile)
- runs Windows OS 7.0 or greater (desktop)
- has either the App Store or Google Play store installed
- is not jailbroken.

**Qtip:** Feel free to log in to the same Qualtrics account from multiple devices. Responses collected on each mobile device can all be uploaded back to the same survey and tagged with the Device Identifier.

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## Generating an API Token

Before you can use the offline app, you need to make sure your account has an API token. You only need to generate an API token once. If you already have an API token, **do not** generate a new one.

The screenshot shows the 'XM My Account' interface. At the top right, there is a user profile icon (1) and a dropdown menu (2) with options: 'Qualtrics Demo', 'Qualtrics US West US1, General', 'Site Intercept', 'Account Settings...', 'Refresh Account', and 'Logout'. Below the navigation bar, the 'Qualtrics IDs' section (3) is active. It features a table of surveys, a 'User' section with 'User ID' (UR\_bEMwd35hAqGjIHP) and 'Organization ID' (qus1), an 'API' section with a 'Token' field and a 'Generate Token' button (4), and a 'Libraries' section with 'My Library: Qualtrics Demo' (UR\_bEMwd35hAqGjIHP) and 'Global Library: Qualtrics Library' (GR\_9ZezyPpekKWhzD).

1. Click the silhouette in the upper right corner of your account.
2. Select **Account Settings**.
3. Click **Qualtrics IDs**.
4. If there is no API token, click **Generate** to receive a token.

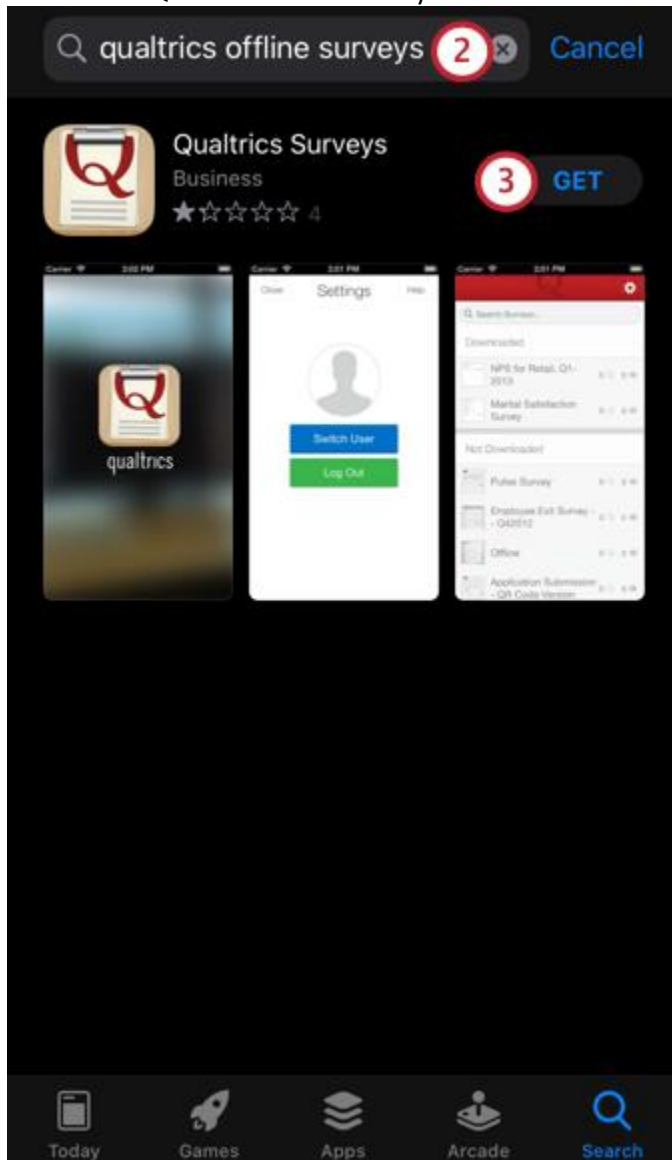
**Warning:** If there is already an API token listed for you, **do not generate** another one.

**Qtip:** If you're not seeing the generate token option at all, you may want to contact your [Brand Administrator](#) to make sure the **Access API permission** is turned on for your account.

## Downloading the Qualtrics Offline Surveys App

1. Go to the iTunes App Store if you have an iPad or iPhone, or go to the Google Play Store if you have an Android device.

2. Search for “Qualtrics Offline Surveys.”



3. Download the **Qualtrics Surveys** app.

You can also download the Qualtrics Offline Surveys app to your device using these links:

[iPad, iPod, & iPhone](#) | [Android Tablets & Phones](#)

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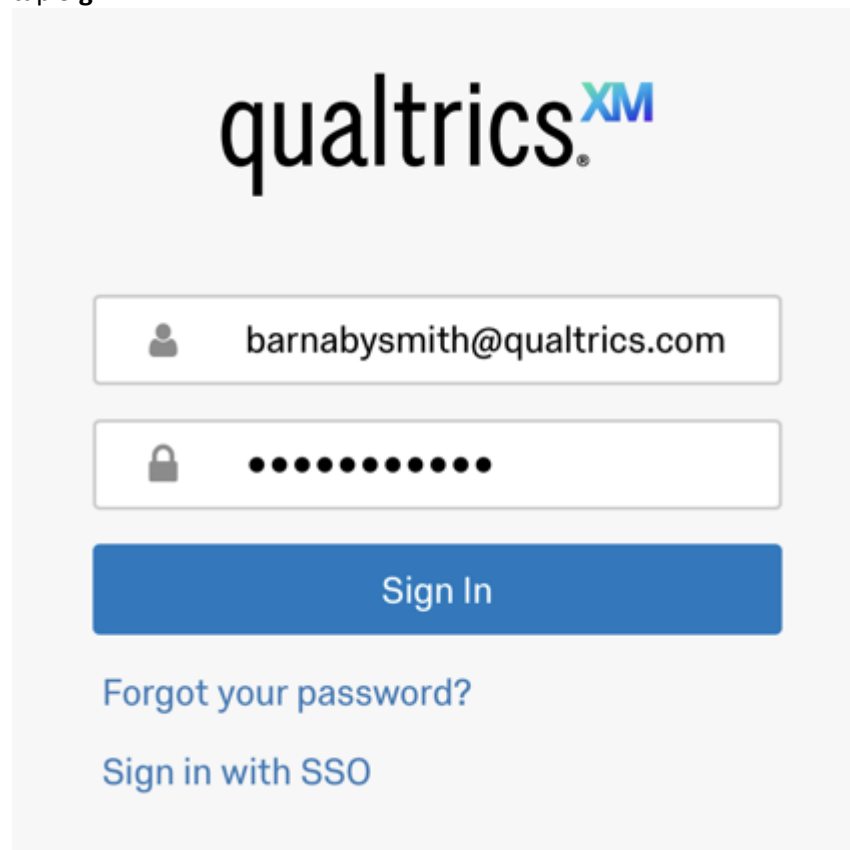
### Entering Your Qualtrics Credentials

**Qtip:** Logging in to the Offline Surveys app requires an active internet connection. Once you’ve logged in and downloaded surveys you need, you’ll be able to go offline while collecting responses.

**Attention:** The app will automatically log you out after two months of inactivity.

## STANDARD LOGIN

If you use the standard login for accessing your Qualtrics account on a desktop (i.e. you directly log in to Qualtrics with a Qualtrics-specific username and password), then you'll use the standard login as well for accessing the offline app. To log in to the app, enter your Qualtrics username and password, and then tap **Sign In**.

The image shows a login screen for Qualtrics XM. At the top is the Qualtrics XM logo. Below it are two input fields: the first contains the email address 'barnabysmith@qualtrics.com' and the second contains a masked password represented by ten dots. A blue 'Sign In' button is positioned below the password field. Underneath the button are two links: 'Forgot your password?' and 'Sign in with SSO'.

**Qtip:** If the app won't let you log in, even after opening and closing or updating the app, you might not have permission to use it. Talk to your [Brand Administrator](#) to find out if your organization and your account have permission to use the Qualtrics Offline App. (Note: This is different from the [Qualtrics XM App](#).)

**SSO LOGIN: THIS IS THE ONE WE WILL BE USING, OUR ORGANIZATION ID IS: XXX**

## TROUBLESHOOTING

Some accounts have difficulty logging in due to the number of surveys in the account. If your account has over 100 surveys, you are at risk. You'll typically see an error message stating, "API Error: We were unable to retrieve data from our servers. Please ensure that you have a good internet connection and correct account permissions."

To mitigate this issue, many organizations [create](#) "Offline User" accounts that are used strictly for offline surveys. By [collaborating](#) the surveys to these accounts, they can easily be used to collect responses that filter into the original account. To set up an Offline User account, make sure they have the following [user permissions](#):

- **Use Offline Mobile App**
- **Collaborate Projects**
- **Allow Non-Accessible Surveys**
- **Access API**

In addition to the above user permissions, the project owner will also need to give the Offline User the following [collaboration permissions](#):

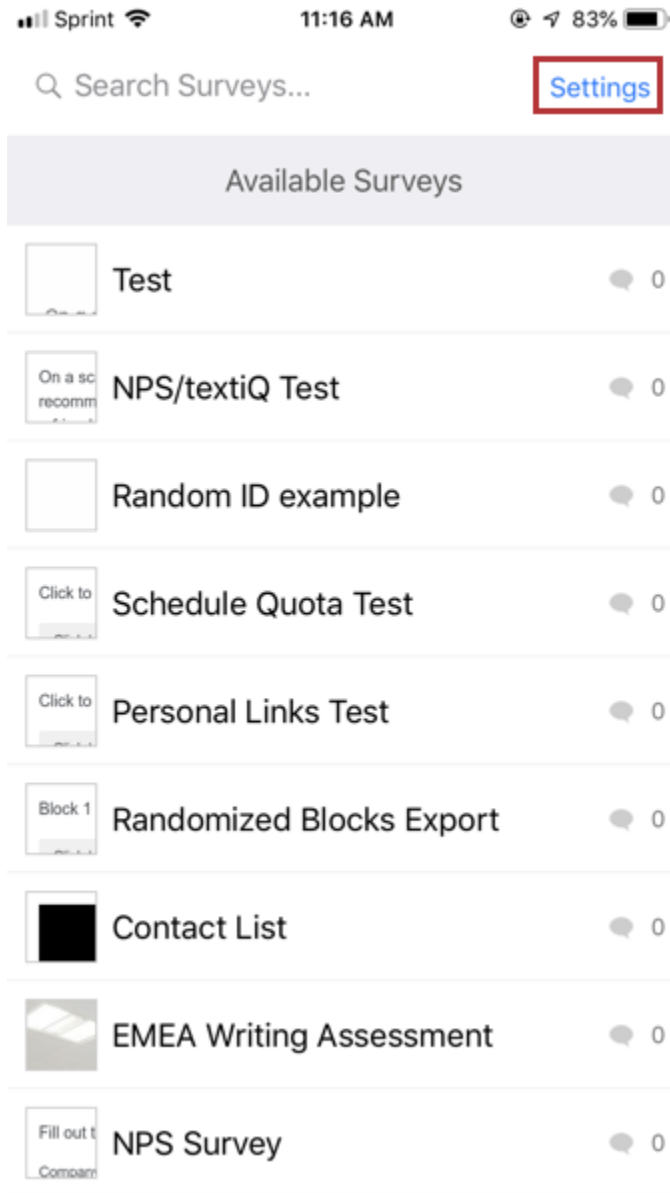
- **View Survey Results**
- **Download Survey Results**

## USING DEVICE IDENTIFIER

The Device Identifier field is useful for knowing which devices recorded which responses. This field can be updated at any time, but it will only affect the Device Identifier for future responses. This field is also useful if one device will be used by many administrators. Each admin can change the identifier to their name so responses can be better organized. After responses are uploaded, the Device Identifier will appear in the dataset only if you add the **DeviceIdentifier** [Embedded Data](#) field to your [survey flow](#). Below is how to configure the Device Identifier field.

1. [Log in](#) to the Offline App.

2. Tap **Settings**.





3. Enter your desired value in the **Device Identifier** field.

Sprint 11:40 AM 81%

Close Settings Help

Username

Device Identifier

ED Tracking

Reauthenticate

Log Out

**Qtip:** Make sure to add the **DeviceIdentifier** [Embedded Data](#) field to your survey's [Survey Flow](#) so this data will appear in your dataset!

Survey Flow NPS Survey

Zoom Out Zoom In

Show Flow IDs

**Set Embedded Data:**

**DeviceIdentifier** Reserved Embedded Data fields cannot have custom values.

[Add a New Field](#)

[Add Below](#) [Move](#) [Duplicate](#) [Add From Contacts](#) [Options](#)

**Show Block: Consent** (1 Question) [Add Below](#) [Move](#) [Duplicate](#)

**Show Block: Contact Info Block** (5 Questions) [Add Below](#) [Move](#) [Duplicate](#)

**Show Block: Block 2** (2 Questions) [Add Below](#) [Move](#) [Duplicate](#)

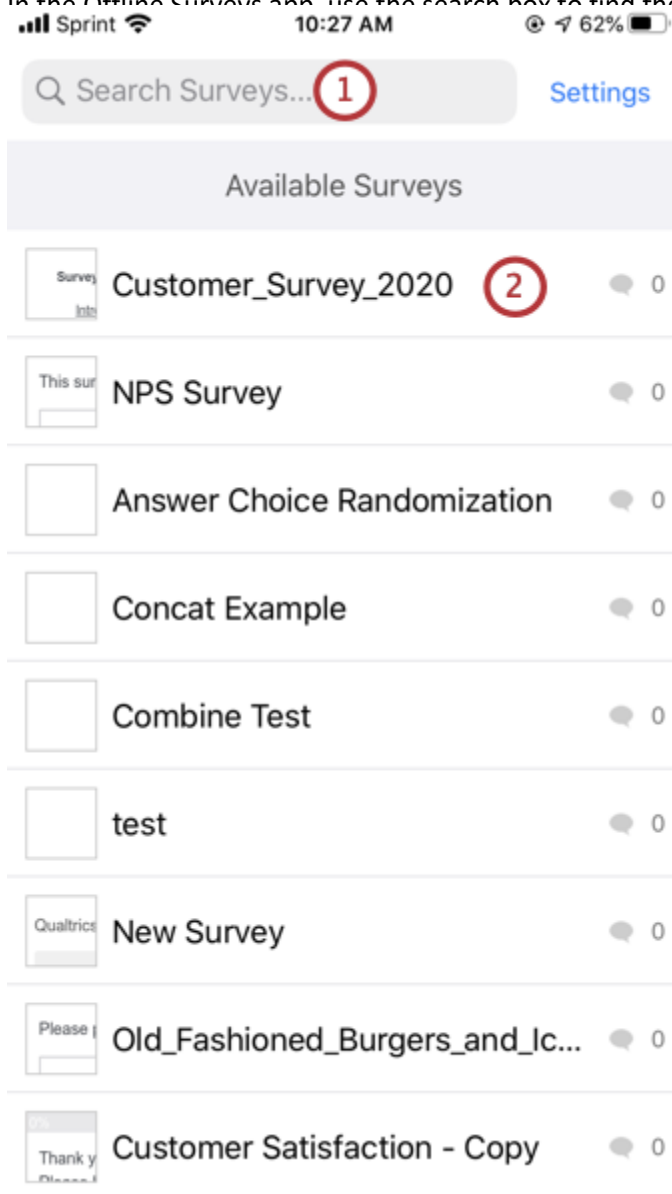
**Show Block: Reviewer Block** (1 Question) [Add Below](#) [Move](#) [Duplicate](#)

## Downloading Surveys

**Attention:** You can only download surveys that are compatible with the offline app. See [Offline App Incompatible Feature](#) for a comprehensive list of what survey features cannot be used in the offline app.

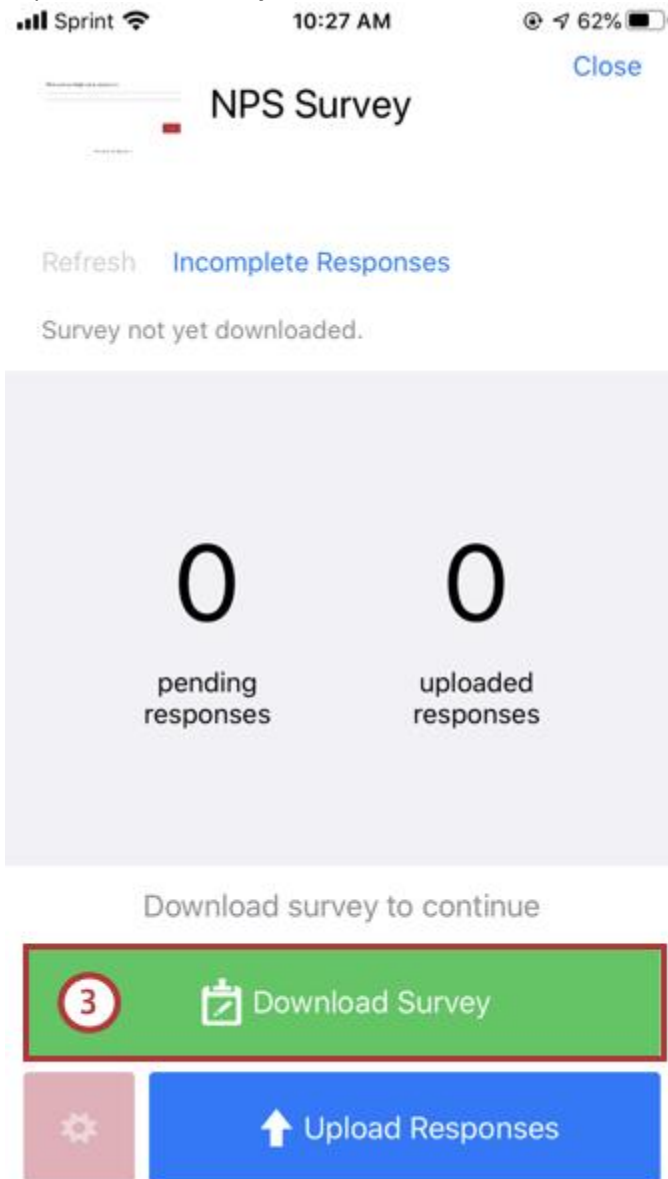
**Qtip:** Make sure you have a strong and stable Internet connection when downloading surveys

1. In the Offline Surveys app, use the search box to find the survey you'd like to download.

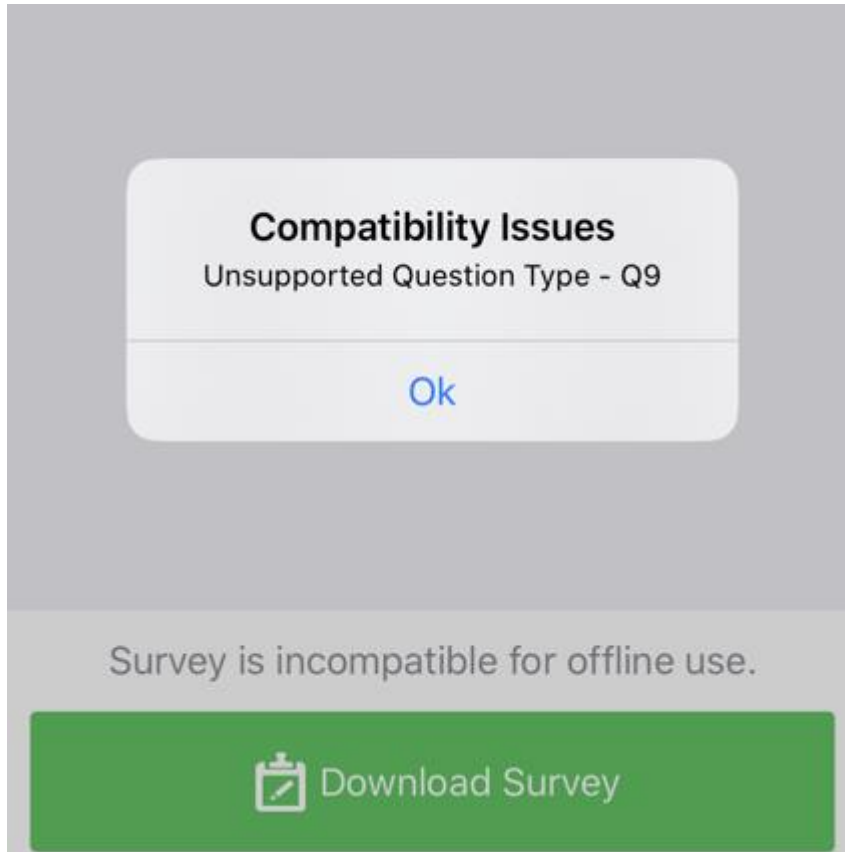


2. Tap on the survey you wish to download.

3. Tap **Download Survey**.



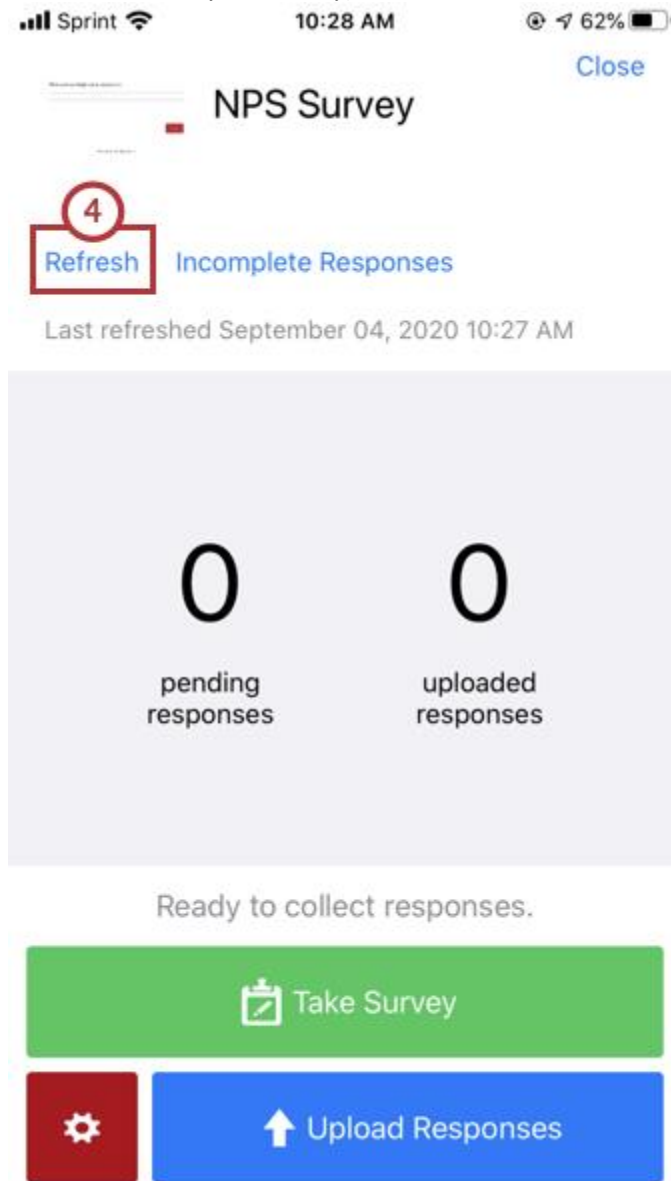
**Qtip:** Surveys are complex! With over 100 question types and countless variations of logic, not all surveys are compatible in the offline format. If you attempt to download an incompatible survey, you will receive an error letting you know what features of your survey are incompatible.



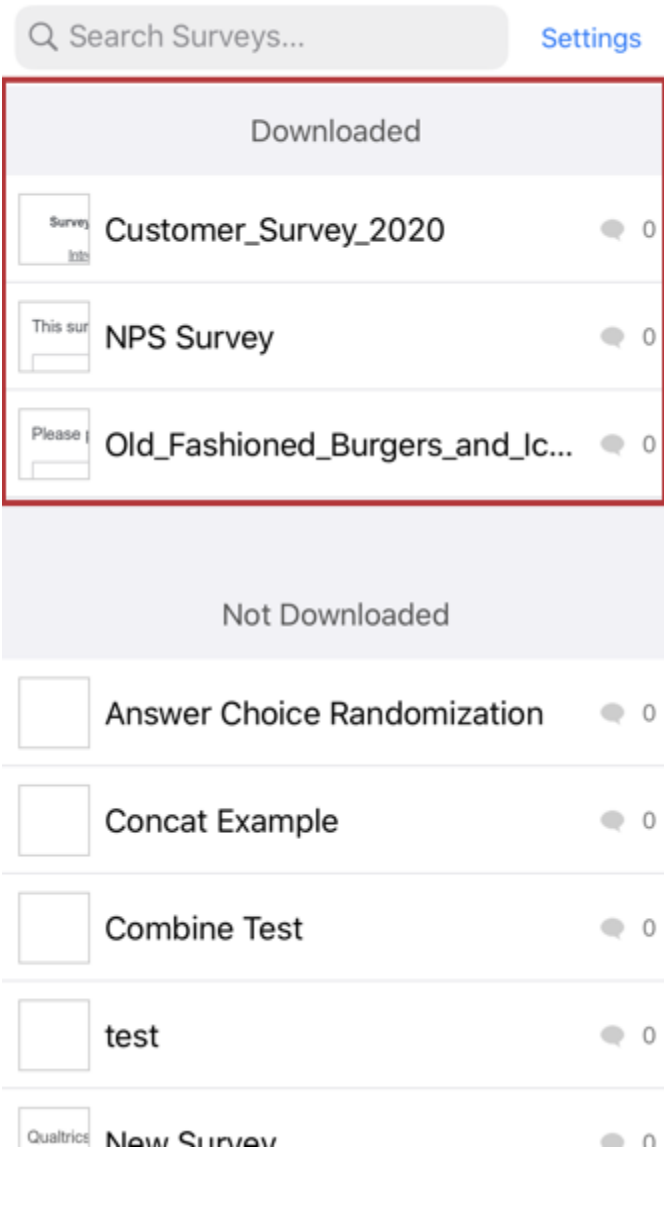
Because the app is always being improved, we recommend that you check back often and download the latest update. Once the Qualtrics Offline Surveys app has been enabled for your license, you'll also have access to the [Mobile Compatibility Advisor](#), which will alert you to any questions in the survey editor that aren't compatible. See [Offline App Incompatible Features](#) for more information about what features are incompatible with the offline app.

4. To update your survey if you make any changes online, simply click **Refresh** on the top left of the survey overview window (note that you must be connected to the internet to refresh to the

latest version of your survey).



You can see your downloaded surveys above the rest of your surveys in the Downloaded section on the home screen.



Was this helpful?

Yes No

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

### App Settings

The **Settings** menu contains options for managing and securing your account, such as adding a pin, reauthenticating into your account, and deleting all data from the app.

Close

# Settings

Help



Username

Device Identifier

ED Tracking

Advanced Settings

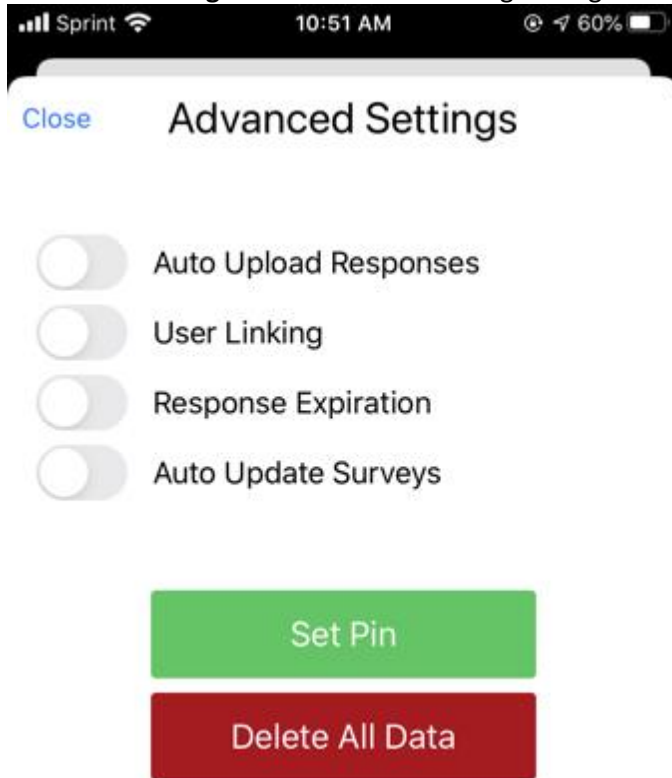
Reauthenticate

Log Out

[View Privacy Policy](#)



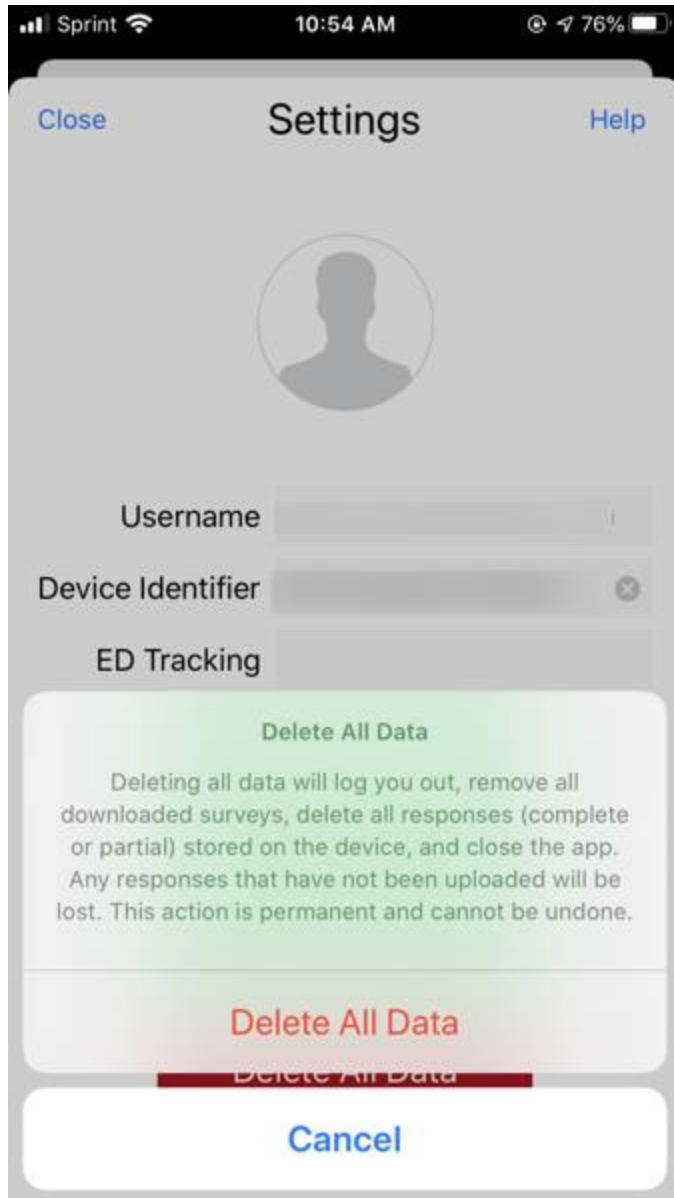
- **Advanced Settings:** Contains the following settings:



- **Auto Upload Responses:** Responses will be automatically uploaded to Qualtrics when your device connects to the Internet.
- **User Linking:** Allows users to save the following attributes to their data set as [embedded data](#): name, given\_name, family\_name, preferred\_username, email. [SSO](#) users can also save their SSO attributes as embedded data when this option is enabled. Make sure to add an embedded data element to your [survey flow](#) to save this information in your dataset!

**Qtip:** You may need to reach out to your IT team to ask them what your organization’s SSO attributes are

- **Response Expiration:** Closes responses after the period of time defined in your survey’s [partial completion setting](#).
- **Auto Update Surveys:** Surveys will be automatically updated when your device is connected to the Internet.
- **Set Pin:** This option lets you specify a 4 digit pin number for using the app. The app will ask for this pin after 10 minutes of being inactive in the background.
- **Delete All Data:** This option lets you delete all data stored in the app. This includes any downloaded surveys and responses stored on the device. Additionally, you’ll be logged out of the app and the app will close. Any responses that have not been uploaded will be deleted. This action is permanent and cannot be reversed



- **Reauthenticate:** This option brings you to the login screen for the offline app for entering your account credentials.
- **Log Out:** This option logs you out of the app.

**Attention:** Never log out of the Offline App if you have responses to upload. If you log out of the app without [uploading](#) your responses, you will lose your responses.