Ot FieldCollect – Administrator guide

Set up offline data collection: choose surveys and collectors, connect phones, follow what arrives, and keep data safe.

Otzar Labs · Ot FieldCollect · for version 2.0

Contents

1. Before you start
2. Install and activate
3. Make a survey available on phones
4. Connect phones
5. Follow the work: Activity
6. When a phone cannot get online: backup files
7. The app's name and colour
8. Trial and licence keys
9. Keeping data safe
10. Troubleshooting

Ot FieldCollect lets your field teams fill in LimeSurvey surveys on Android phones and iPhones **without internet**. Interviews are kept on the phone and arrive in LimeSurvey as normal responses as soon as the phone is back online.

This guide is for the LimeSurvey administrator who sets it up and runs it. For the people in the field, there is a separate one-page **Collector guide** you can print or send to them.

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1. Before you start

You need:

- **LimeSurvey 5, 6 or 7**, Community Edition, on your own server.
- **HTTPS** on your LimeSurvey site (an address starting with `https://`). Phones only allow offline apps and location on secure sites.
- **Phones:** Android with Chrome, or iPhone/iPad with Safari on iOS 15.4 or newer.
- **A trial key or a licence key** (section 8). Without a key, phones cannot connect to a public website.

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2. Install and activate

1. In LimeSurvey, open **Configuration → Plugins → Upload & install**.
2. Choose the zip file (for example `OtFieldCollect-2.0.0.zip`) and click **Install**.
3. Find **OtFieldCollect** in the plugin list and click **Activate**.
4. A new **Offline** item appears in the top bar. Click it to open the plugin, which has four tabs: **Surveys**, **Phones**, **Activity** and **Settings**.

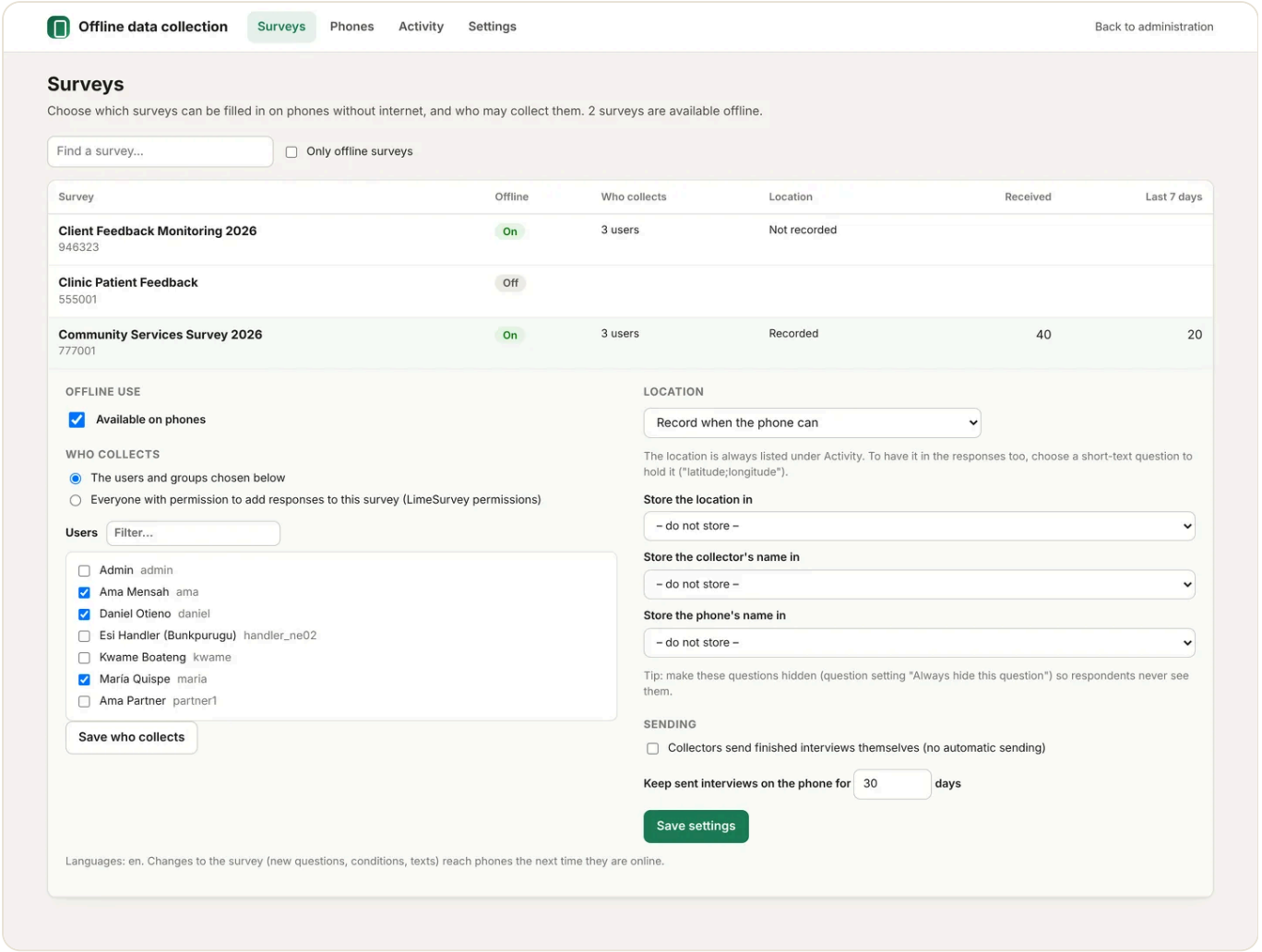
5. Go to **Settings** and paste your trial or licence key (section 8).

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3. Make a survey available on phones

The survey must be **activated** in LimeSurvey first (Survey → Activate), as for web collection.

1. Open **Offline → Surveys** and click the survey.
2. Tick **Available on phones**.
3. Choose **who collects** and the other settings described below, then click **Save who collects** and **Save settings**.



The Surveys tab: each survey's status, who collects it, location setting and interviews received. Click a survey to change its settings.

Who collects

Choice	Who sees the survey on their phone
The users and groups chosen below	Only the LimeSurvey users and user groups you tick. Recommended.
Everyone with permission to add responses to this survey	Anyone who has that LimeSurvey permission for the survey.

Each collector needs a **LimeSurvey user account**. Create one under **Configuration → User management**. A collector does not need any other LimeSurvey permission.

Location (GPS)

Setting	What happens
Do not record	No location.
Record when the phone can	The phone records where the interview was finished, with its accuracy, if location is allowed.
Required	An interview cannot be finished until the phone has a location. Use this only when location really matters, because it can block collectors indoors or with weak GPS.

The location always appears under **Activity**. To keep it in the responses as well, create a **short text** question in the survey (for example `GPS`) and choose it in **Store the location in**. It is saved as `latitude;longitude`. In the same way you can store the **collector's name** and the **phone's name** in short-text questions.

Tip: set those questions to **Always hide this question** in LimeSurvey, so respondents and collectors never see them.

Sending

Setting	What happens
Collectors send finished interviews themselves	Not ticked (default): finished interviews are sent automatically whenever the phone has internet. Ticked: they wait until the collector taps **Send now**.

Setting	What happens
Keep sent interviews on the phone for … days	Sent interviews stay visible on the phone for this many days, so collectors can look back at their work. They are then removed from the phone (they are safe on the server).

What works on phones

- Question types: single and multiple choice, dropdowns, Yes/No, gender, 5-point choice, lists with comments, all array types (including dual scale, numbers and texts), numbers, multiple numbers, dates, short and long text, multiple short texts, ranking, equations, text displays and file uploads (photos).
- Survey logic: conditions (relevance), array filters, validation, mandatory and soft-mandatory questions, number ranges, "Other" answers and answer piping, using LimeSurvey's own expressions.
- Several survey languages, random answer order and default answers.

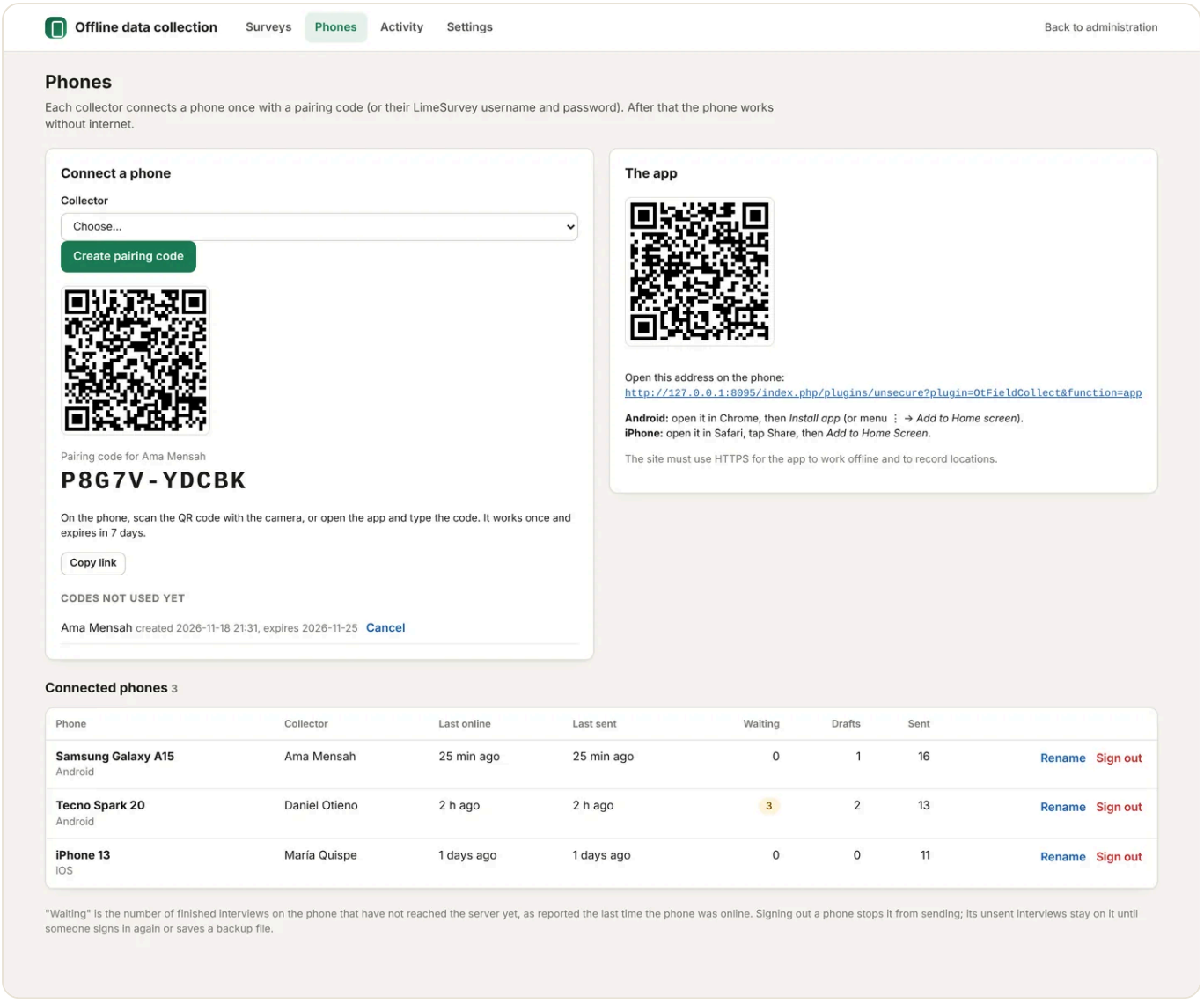
Not used on phones: quotas, participant tokens (responses are saved without a token), timers, the `self` / `that` expression shortcuts, and question types added by other plugins. If a survey contains a question the phones skip, the survey's settings panel lists it.

Changing a survey during collection: phones get the new version the next time they are online. Interviews already started keep their answers. Anything that no longer fits the survey (for example a removed answer option) is left out and noted under Activity; the rest of the interview is saved.

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4. Connect phones

Each collector connects their phone **once, with internet**. After that the phone works offline.



The Phones tab: create a pairing code for a collector, the app's address and QR code, and the list of connected phones.

With a pairing code (recommended)

1. Open **Offline → Phones**.
2. Under **Connect a phone**, choose the **Collector** and click **Create pairing code**.
3. The collector scans the **QR code** with the phone's camera, or opens the app address and types the code.
4. On the phone they check the phone's name and tap **Connect**.

A pairing code works **once** and expires after **7 days**. Unused codes are listed under *Codes not used yet*, where you can cancel them. Use **Copy link** to send the code by message to a collector who is far away.

With a username and password

Collectors can also open the app address, choose **Username** and sign in with their LimeSurvey username and password. The phone keeps a device key, never the password.

Add the app to the home screen

After connecting, the collector adds the app to the phone's home screen. It then opens like any other app, even without internet:

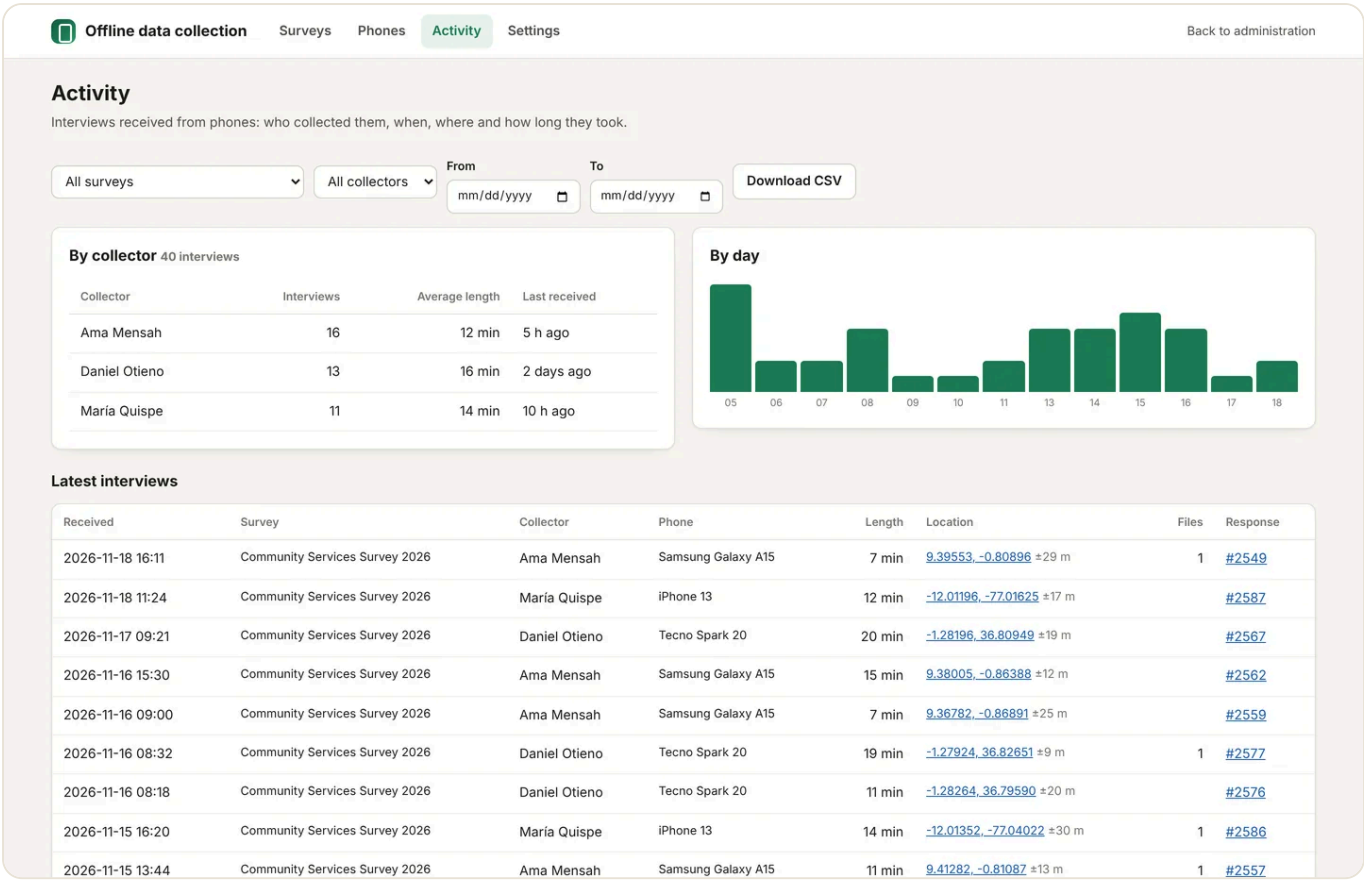
- **Android (Chrome):** tap **Install app** when it appears, or open the menu ⋮ → **Add to Home screen**.
- **iPhone (Safari):** tap **Share** → **Add to Home Screen**. This step matters on iPhones: it is what makes Safari keep the app's data.

The list of connected phones

Column	Meaning
Last online	The last time the phone contacted the server.
Last sent	The last time it sent interviews.
Waiting	Finished interviews still on the phone, as reported the last time it was online. Highlighted when above zero.
Drafts	Interviews started but not finished.
Sent	Interviews received from this phone.

Rename gives the phone a clearer name. **Sign out** disconnects it straight away, for example when a phone is lost or changes hands. A signed-out phone cannot send any more. Its unsent interviews stay on it until someone signs in again or saves a backup file.

5. Follow the work: Activity



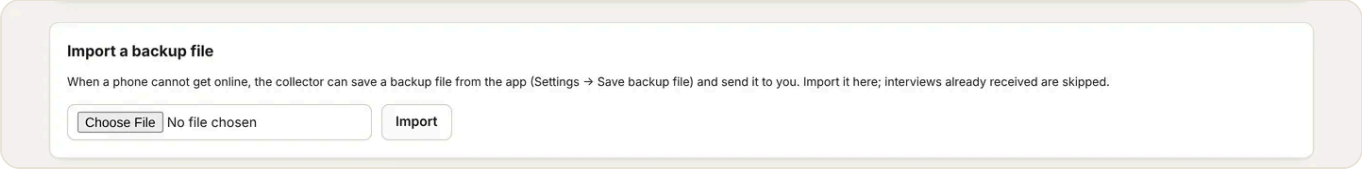
The Activity tab: interviews by collector and by day, and every interview received with its location, length and a link to the response.

- **Filters:** survey, collector and dates.
- **By collector:** number of interviews, average length and when each collector last sent.
- **By day:** interviews received per day.
- **Latest interviews:** when it arrived, survey, collector, phone, interview length, location (click to open a map), files attached, and a link to the **response** in LimeSurvey.
- **Download CSV:** the list for Excel or your own reports.

The responses themselves are normal LimeSurvey responses: view, export and analyse them under the survey's **Responses** as usual.

6. When a phone cannot get online: backup files

If a phone will be without internet for a long time, or is going to be replaced, the collector can save its unsent interviews to a file: on the phone, **Settings → Save backup file**. They send the file to you (by cable, email or messaging app).



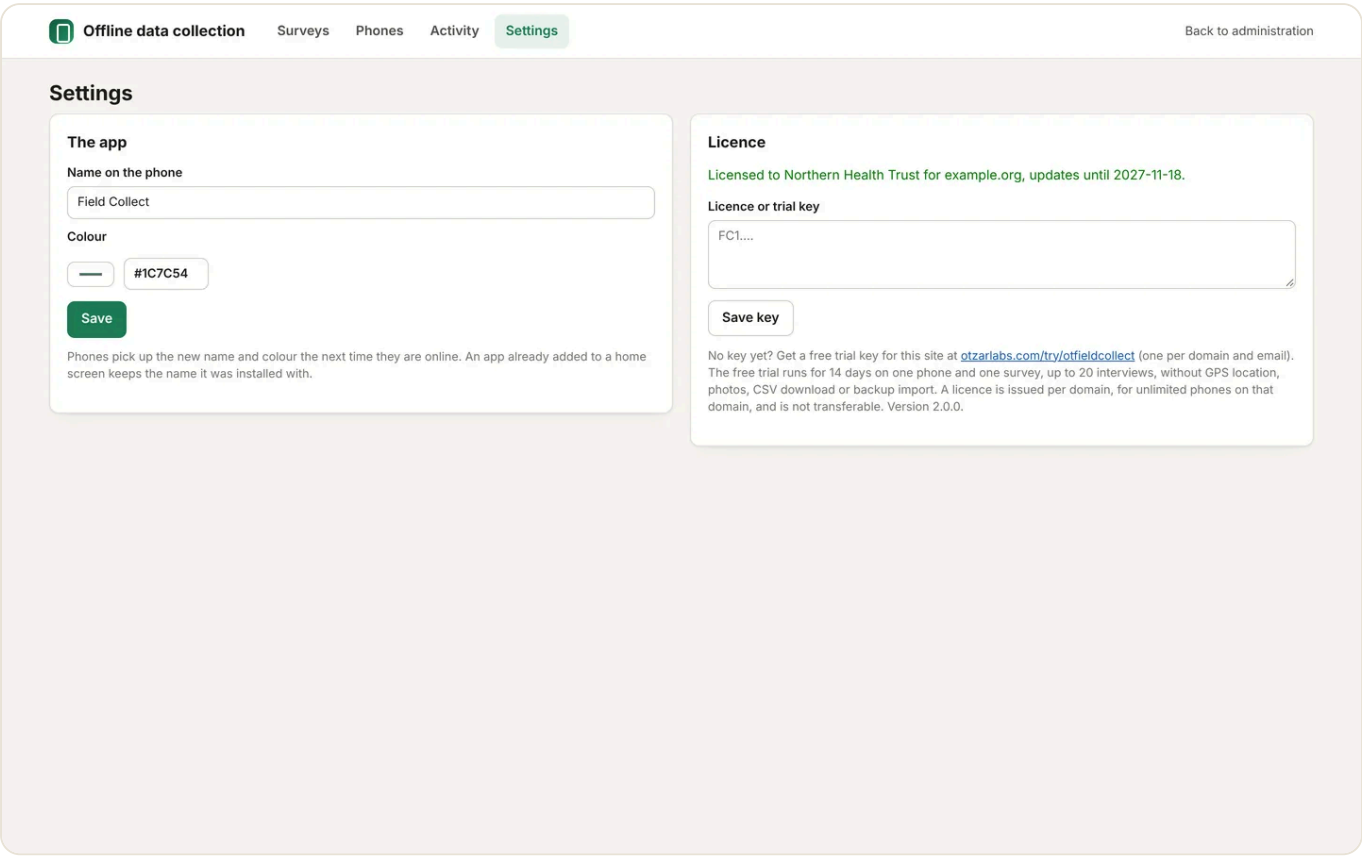
Import a backup file at the bottom of the Activity tab.

At the bottom of **Activity**, choose the file and click **Import**. Interviews that were already received are skipped, so importing the same file twice does no harm.

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7. The app's name and colour

Under **Settings → The app** you can change the **Name on the phone** (default *Field Collect*) and its **Colour**. Phones pick up the change the next time they are online. An app already added to a home screen keeps the name it was installed with.



Settings: the app's name and colour, and the licence key.

8. Trial and licence keys

	Free trial key	Licence key
How to get it	Free at otzarlabs.com/try/otfieldcollect: enter your name, email and the address of your LimeSurvey site. The key is emailed to you.	Buy a plan on otzarlabs.com. The key is on screen and emailed after payment, and always in **My licences**.
Lasts	14 days	One year of updates and support; renewable.
Phones	1	Unlimited, on the licensed domain
Surveys	1	Unlimited
Interviews	Up to 20	Unlimited
GPS, photos, CSV, backup import	No	Yes

To add a key: **Offline → Settings → Licence or trial key**, paste the key (it starts with `FC1.`) and click **Save key**.

- A key works for one **domain** and its sub-addresses (a key for `example.org` also works on `survey.example.org`). It cannot be moved to another domain.
- There is **one free trial per organisation**: a second trial for the same email or the same organisation's domain is refused.
- **Nothing is lost when a trial ends.** Phones cannot start new interviews or connect, but interviews already on a phone stay there safely. When you add a licence key, they are sent automatically.
- When a licence's update period ends, the plugin keeps working; only updates and support stop until you renew.

9. Keeping data safe

- Phones hold a **device key**, never the collector's password. Only a fingerprint of the key is kept on the server.
- Interviews stay in the phone's browser storage until they are sent. **Phones should have a screen lock.**

- Collectors must **not clear the browser's data or uninstall the app** while interviews are waiting to be sent.
- Each interview has its own ID, so a weak connection can never create a duplicate response.
- Encrypted questions are saved encrypted, as LimeSurvey does. Uploaded files are checked against each question's allowed types and size.
- Data goes only to your own LimeSurvey server.

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10. Troubleshooting

What you see	What to do
Phones cannot connect: *needs a trial key or a licence key*	Add a key for this site under **Settings** (section 8).
The survey does not appear on a phone	Check that the survey is **activated** in LimeSurvey, **Available on phones** is ticked, and the collector is chosen under *Who collects*. Then tap **Send now** on the phone, with internet, to update.
The phone refuses the pairing code	Codes work once and expire after 7 days. Create a new one.
The app does not open offline	Open it once with internet after connecting, and add it to the home screen. The site must use HTTPS.
No location recorded	The location setting must be *Record when the phone can* or *Required*, the phone must allow location for the browser, and the site must use HTTPS. Location needs a licence key.
A phone shows interviews **Waiting** for days	The collector should go online and tap **Send now**. If that is not possible, ask for a backup file (section 6).
The free trial accepts 20 interviews / trial ended	Add a licence key. Waiting interviews are then sent automatically.
A phone is lost	**Phones → Sign out** at once. Interviews it never sent cannot be recovered.
A collector leaves	Sign out their phone and untick them under *Who collects*.

Need help? Write to the support address on otzarlabs.com. Please include your LimeSurvey version, the phone model and, if possible, a screenshot.