

Tricks and Tips for Achieving your Best Form with Survey123

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Today's Speakers



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Surveys and Recordings

- We are recording today
- Expect an email from us with link
- Please share your thoughts on the exit survey

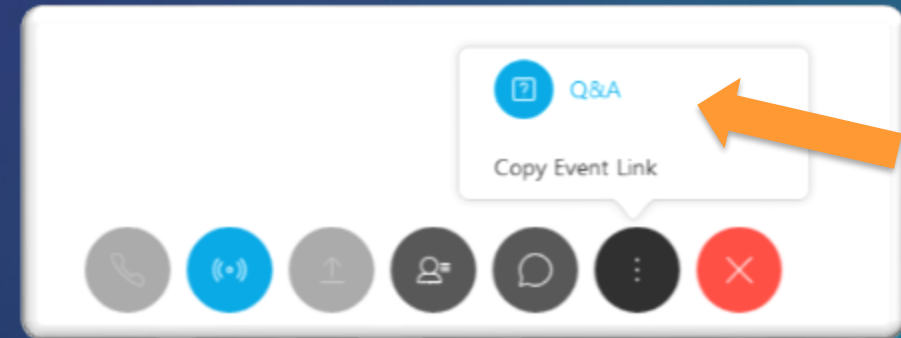
Open to Questions



- Please use the Q&A panel:
 - Choose *Ask: All Panelists*, type your question and click *Send*

A screenshot of the Q&A panel interface. It features a text input field with the placeholder text "Ask: All Panelists". Below the input field is a text area containing the instruction: "Select a panelist in the Ask menu first and then type your question here. There is a 256-character limit." To the right of the text area is a "Send" button. Two orange arrows point to the "Ask: All Panelists" field and the "Send" button.

- If you're unable to see the Q&A panel, click the three dots and then the Q&A button on the control dock at the bottom of your screen:



Today's Agenda

This webinar is designed to help you learn about some capabilities of Survey123 including :

1. Working with the Survey123 website: using the Designer and Analysis/data
2. Working with Survey123 Connect desktop app
3. Working with Survey123 url links



Survey123

Form-centric field data collection

ArcGIS Online
ArcGIS Enterprise



- Capture new data & edit existing records (points, lines, polygons)
- Collect in field app or web browser (*iOS, Android, Windows*)
- Support for **GNSS** for high accuracy
- Work **offline**: own basemaps as tile package *.tpk for offline use
- Leverages Smart forms to use advanced logic: XLS form
 - **Survey123 Connect Desktop** app (Excel)
 - or **web designer** to author
- **Survey123 website**: analyze results immediately
 - create custom report using word template

Owner	Date of Inspection	Inspection Type
Property Address	City	New Installation
City	State	Zip Code
Phone Number	Mobile Number	5 Year Flow Test
Servicing Company	Company Address	
City	State	Zip Code
Phone #		
Make of Hydrants	Model of Hydrants	# of Hydrants Serviced

Survey123 for ArcGIS

Hydrant Inspection Survey

Hydrant id:

Select Inspection Type:

Scheduled Maintenance

Capital Maintenance

Reactive Maintenance

▼ Complete inspection:

If Hydrant has failed test, check reason for failure:

Check if further follow-up is required:

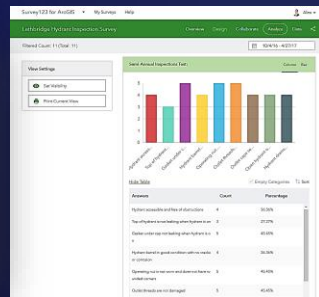
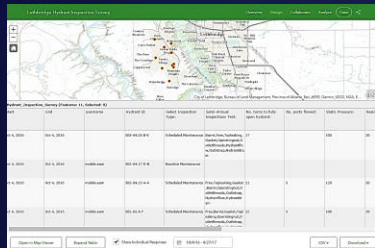
No = inspection is complete

Yes = further work is required;

hydrant failed test

Capture hydrant location:

Location is automatically captured by your device; click on the map if location services are not available.



Water Violation Report

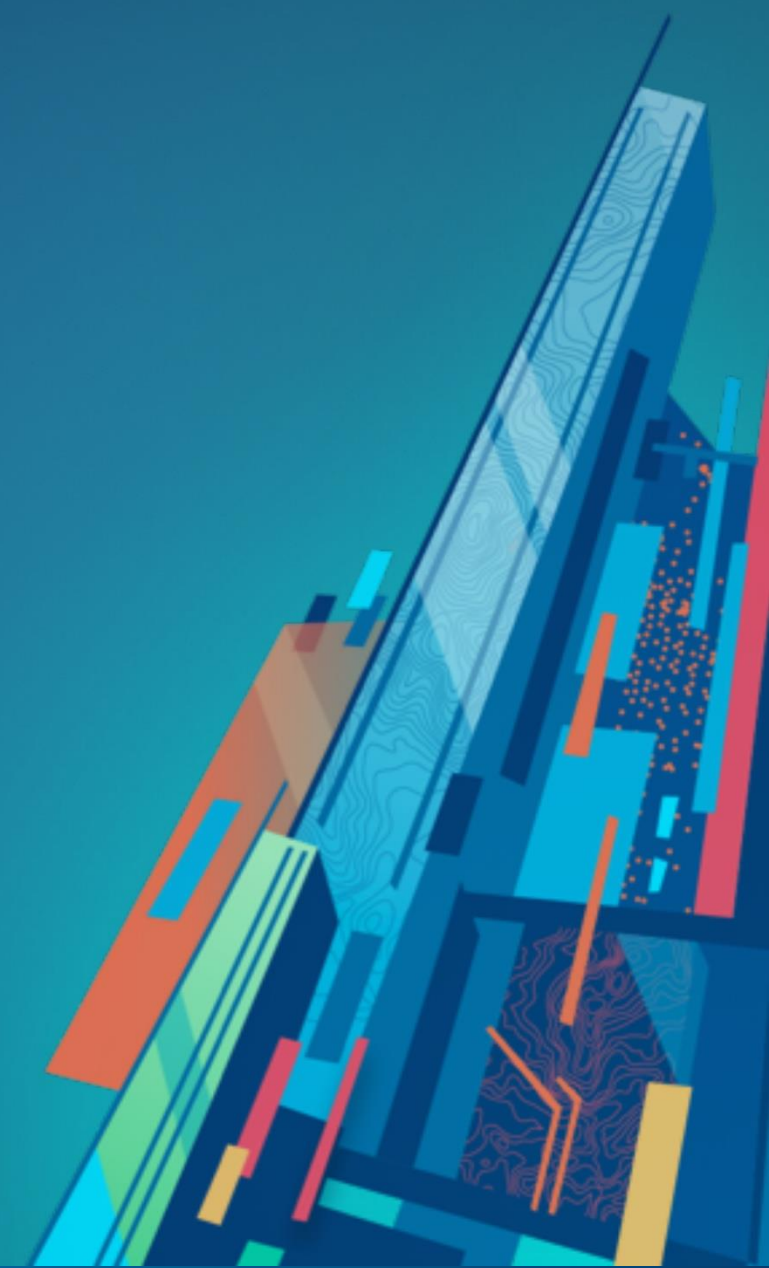
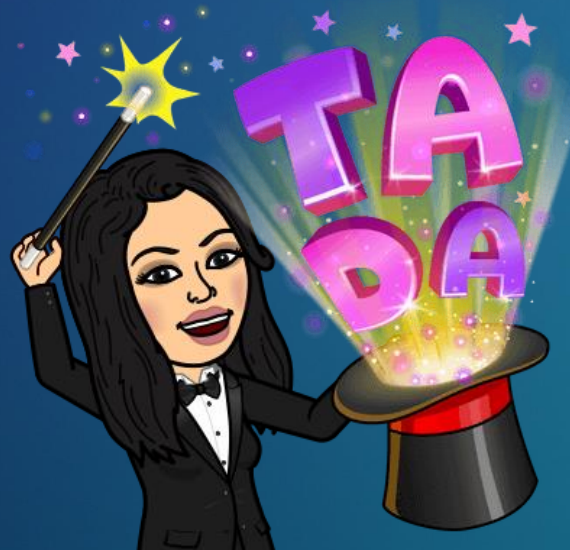
Submitted by: [Name] on [Date]

Offender present: [Status]

Location: [Address]

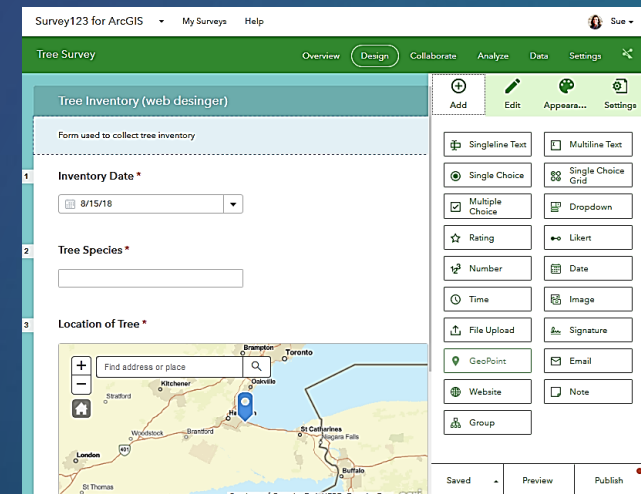
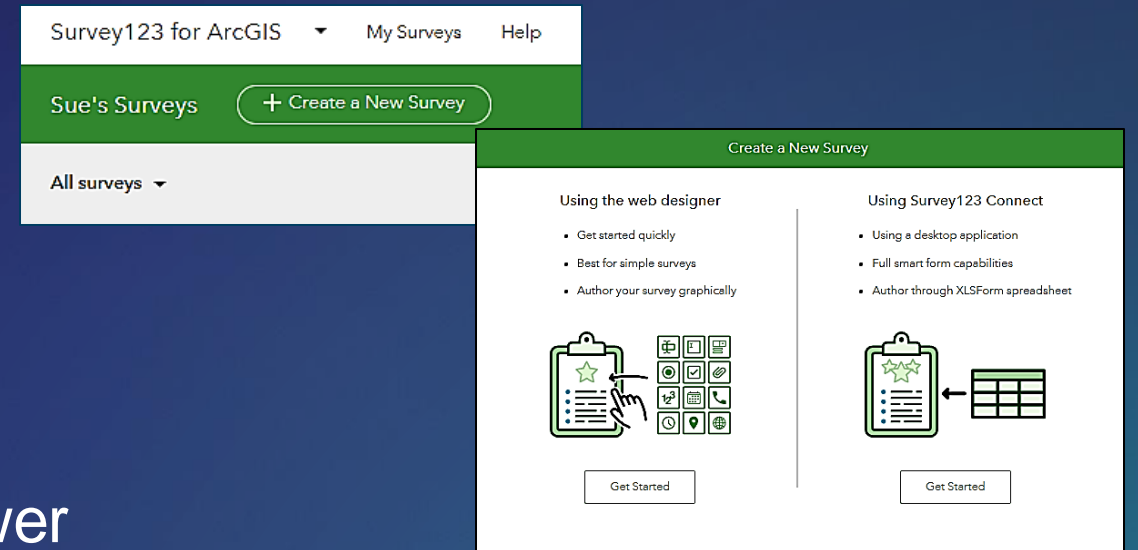
Signature: [Name]

Tips & Tricks for Working with Survey123 Website



Working with the Survey123 Website

- **Designer: Author a New Survey**
 - Creates new hosted feature service
 - Drag & drop from over 20 questions types
 - Edit form only if authored with Designer
 - Edit appearance and settings for all surveys
- **Collaborate: Sharing as a Submitter & Viewer**
- **Analyze: View survey data in tables & graphs**
- **Data: view data in table, on a map**
 - Easy to configure feature reports
 - Exporting to different file types



Tips & Tricks: Survey123 Designer

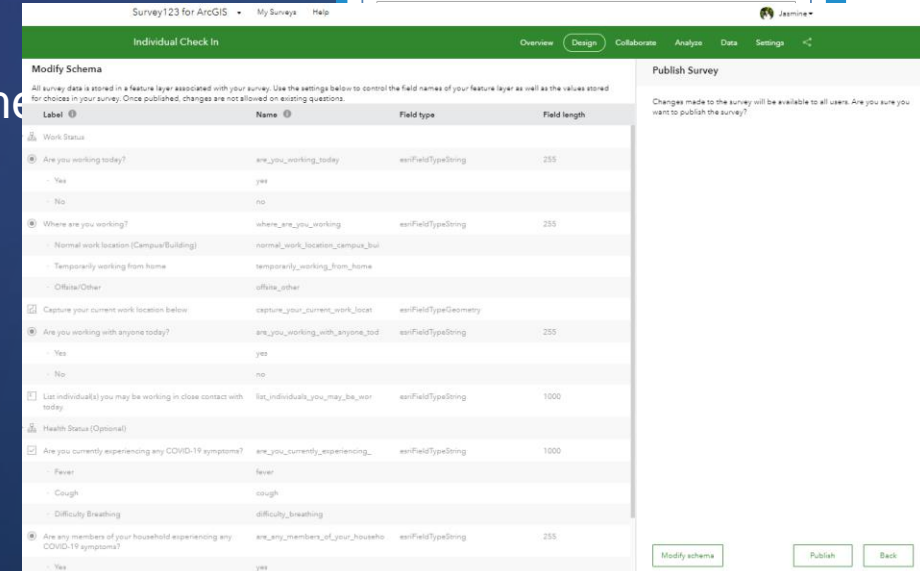
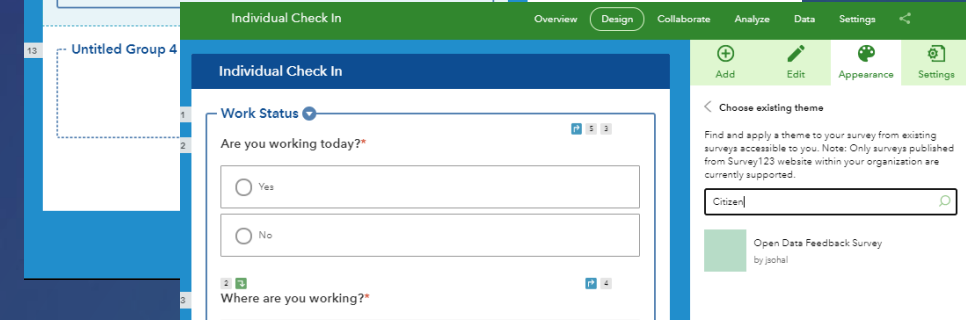
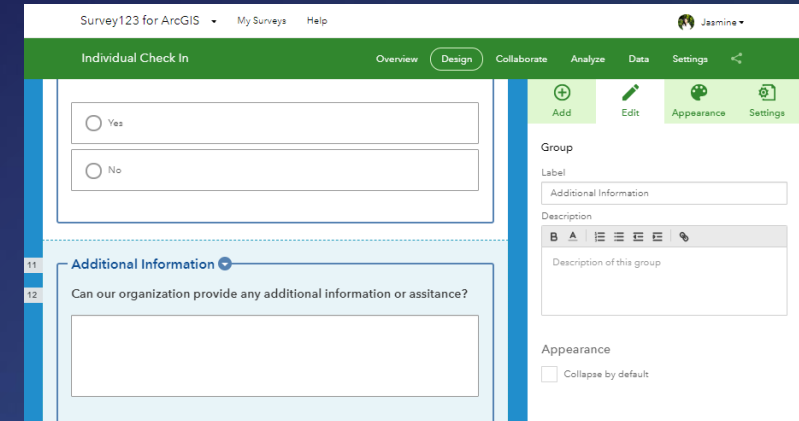
• New Question Types

- New geometry types
 - Capture line and polygon features by selecting geometry type in the Map question
- Grouping and Pages
 - Better way to design and organize your questions

• Design

- New themes and adding Organization or existing theme
- Editing theme of survey from Connect

• Configure schema before publishing



Tips & Tricks: Survey123 Website

• Collaborate

- Enable draft mode to allow the user to resume the survey in the same browser later
- Configure survey status to control when responses are submitted

• Analyze

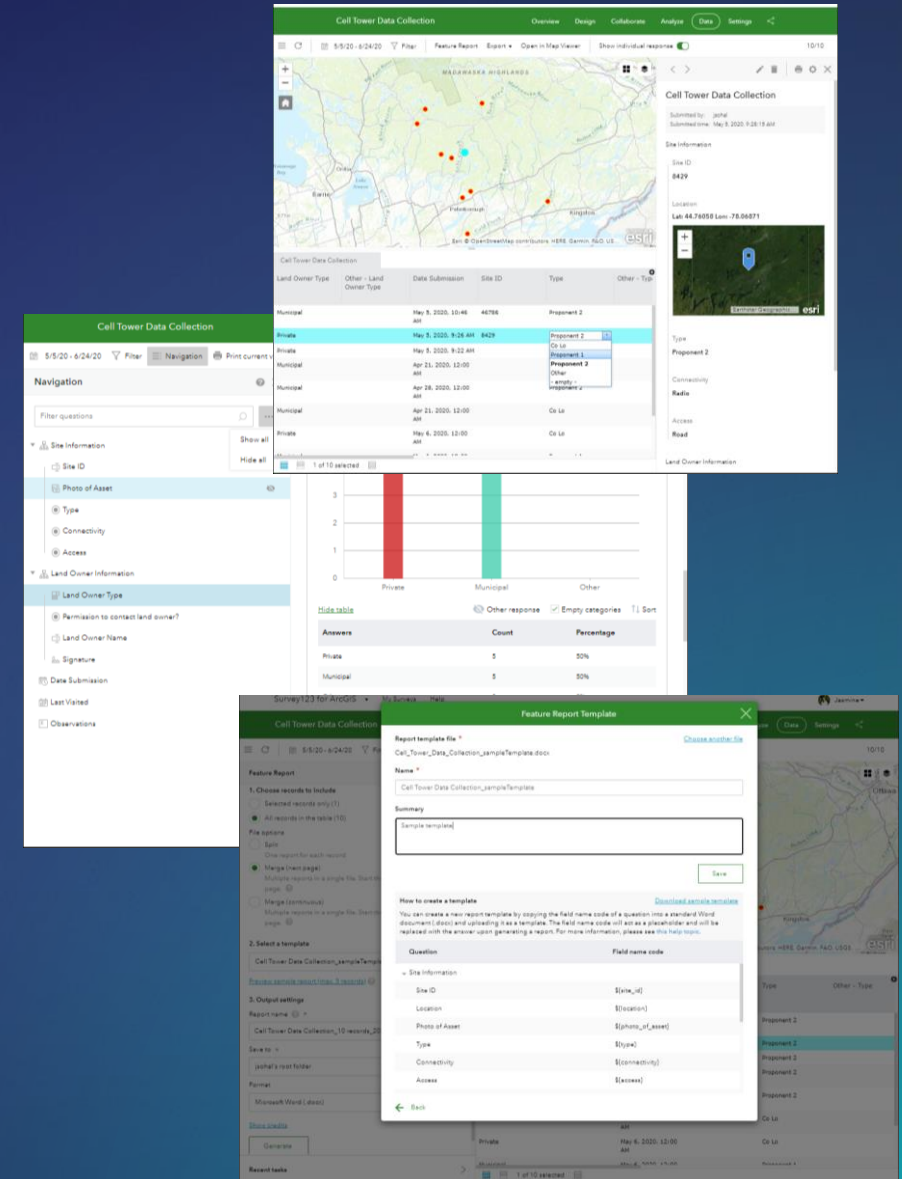
- New Navigation to filter submitted information

• Data

- Edit submitted records
- Configure feature reports for whole dataset or subset
- Export data to various outputs
- Streamlined workflow to monitor captured data

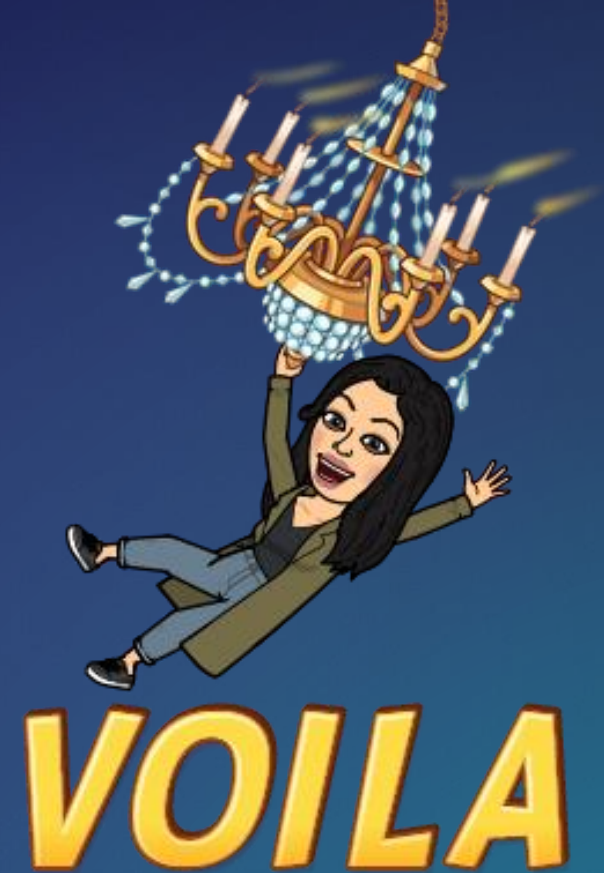
• Settings

- Update your survey to the latest version



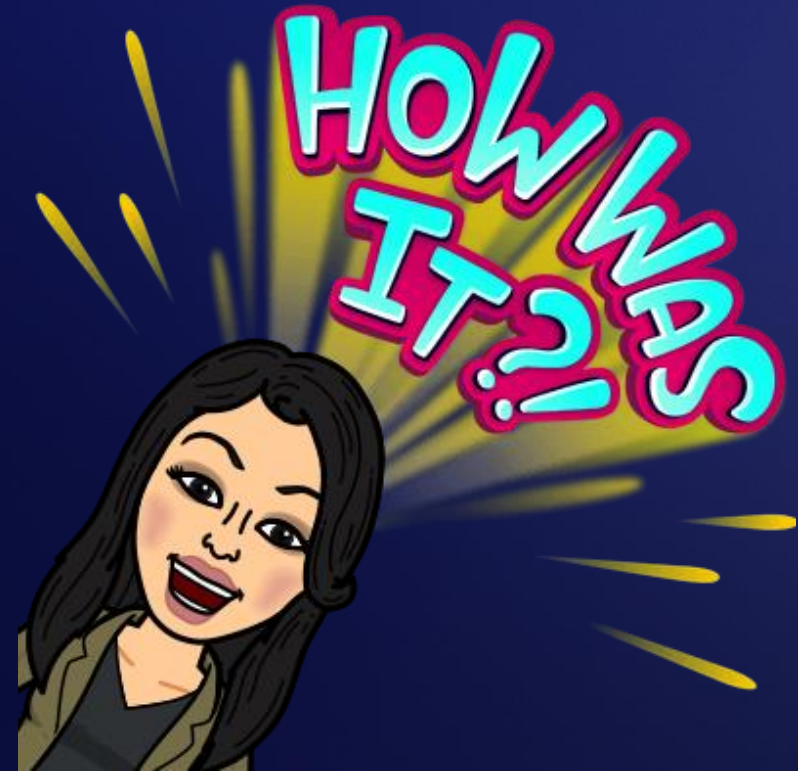
Demonstration 1

- Tips & tricks for working with the Survey123 website
- [Sneak peak of Survey123 website next release](#)

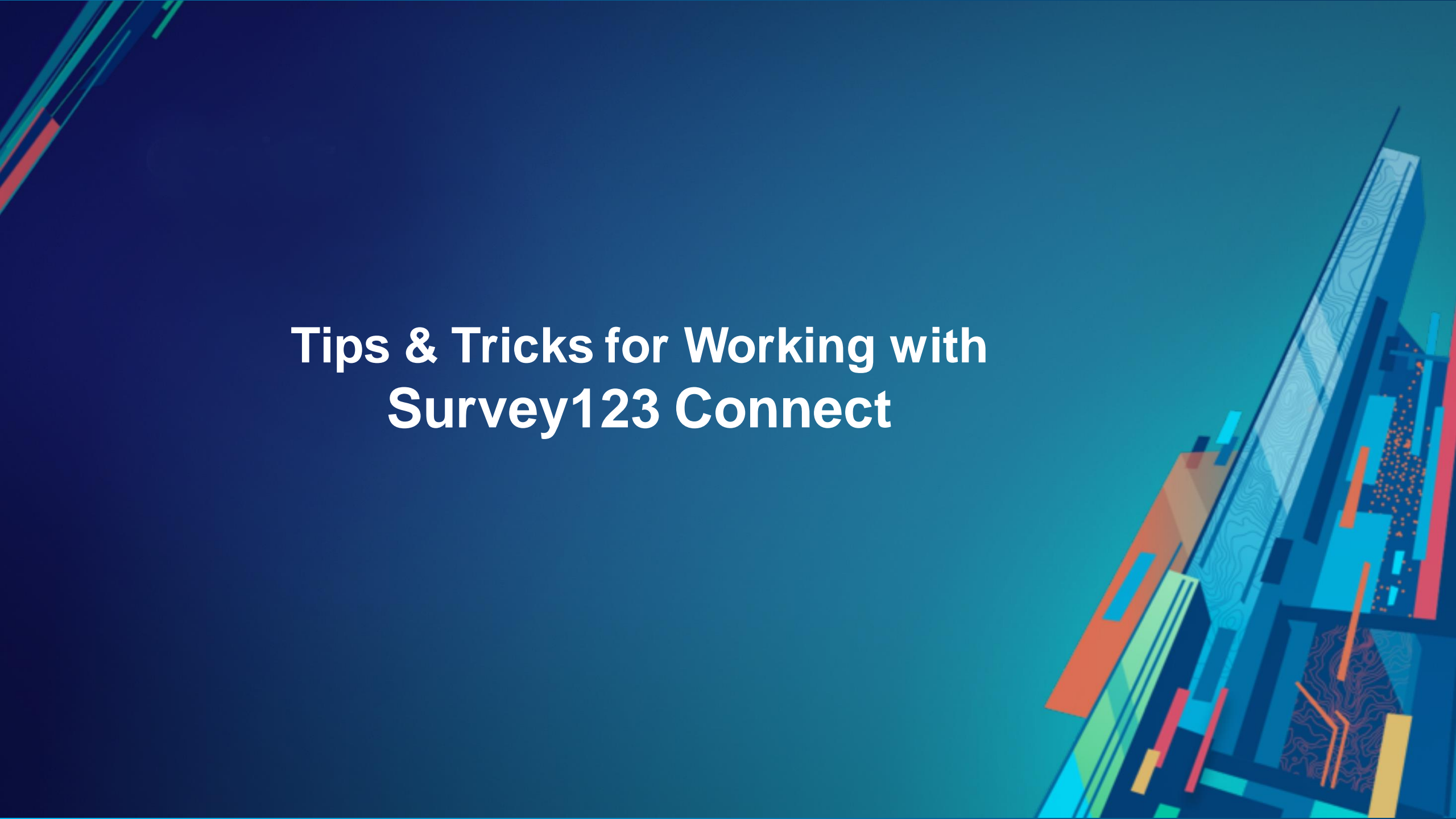


Review and Questions

- Survey123 website

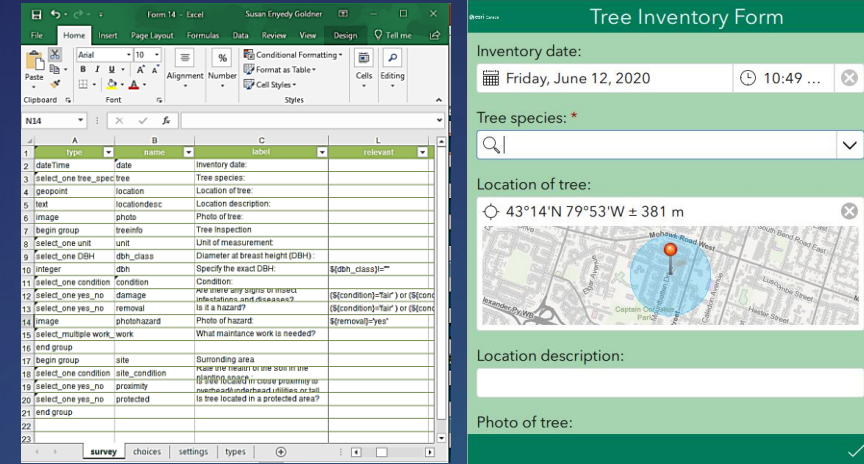


Tips & Tricks for Working with Survey123 Connect

The background features a teal-to-blue gradient. On the right side, there is a complex, abstract graphic composed of various geometric shapes, lines, and patterns in shades of blue, orange, and red. Some elements resemble topographic map lines or data visualization components.

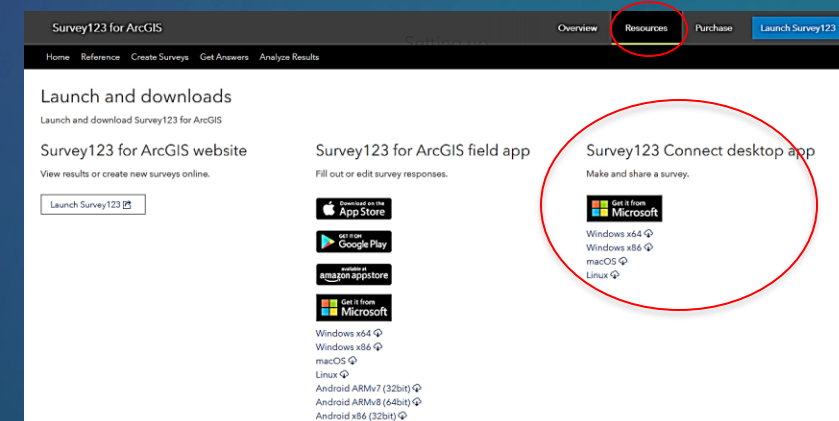
Survey123 Connect

- Supports greater XLS form capability
- Enable more advanced form logic and validation:
 - Add images & audio type questions, work with SVG
 - Add question repeats, grouping, multi-page forms
 - Translate surveys into multiple languages
 - Calculations & expressions
- Use with a spreadsheet: Excel provides XLS Form tips
- Add advanced XLS questions to survey created with Designer
- Templates and samples to get you started
- Create a survey from existing feature service
- Inbox: Add ability for users to edit existing survey data using the field app (new for the web form)



xlsform.org

Quick reference
<https://bit.ly/2MPjggT>



Tips & tricks for working with Survey123 Connect

- Create new survey options:
 - Templates, samples, your surveys & those in your organization, XLS file, feature service
- XLS form:
 - Repeats: multiple photos & locations in one survey, use aggregate functions
 - Calculations (pulldata ...counting repeats/summarize repeat fields)
 - Support/samples for new ways to capture data: barcodes, rangefinder (Spike). Image map format (SVG)
- Settings:
 - Linked content – add a custom webmap
 - Files = what's in the Survey folders
 - Manage in Survey123 website
- Working between Connect & Designer:
 - Download survey created in Designer, update in Connect to add advanced capabilities, publish as new
 - Update Appearance of surveys create in Connect in website
 - Refresh survey in Connect to download appearance changes. What to know about [updating an existing survey](#).
- **Update** to the latest version of Connect & update your surveys

Demonstration II

- Tips & tricks for working with **Survey123 Connect**
 - Repeats
 - Cascading selects & working with selections
 - Using pulldata & pulldata with location
 - Map enhancements
 - Using Image-Map format (SVG)
- Sneak peak of beta/what's coming soon with Survey123 Connect

Who knew
Spreadsheets
could be fun?!?



Review and Questions

- working with Survey123 Connect

Tips & tricks for working with Survey123 url links

The background features an abstract, low-poly geometric design. It consists of various colored planes and lines in shades of blue, teal, orange, and red, creating a sense of depth and movement. The design is concentrated on the right side of the frame, with some elements extending towards the top-left corner. The overall aesthetic is modern and technical.

Survey123: Editing in a web form

- Uses **URL links**:
 - **only possible through the use of web form URL links** (*version 3.4 & newer*)
<https://doc.arcgis.com/en/survey123/reference/integratewithotherapps.htm>
 - **Need some way to “pass” to url parameters & load the individual record for editing in the web form**
- Passing the URL parameter options:
 1. **Load survey features into a **webmap****:
 - Configure a popup with a custom attribute display with Survey123 url link
 - User clicks on survey feature on map
 - then clicks on link in popup to open survey form in browser in edit mode
 2. **Use **webhooks** to send the user email with link to open survey record to edit**
(configure url link using dynamic survey content to pass the feature to edit)
 3. **Embed web survey from in **Dashboard****
 - Configure supporting elements to allow user to select record to edit

Survey123 web app: Using the URL parameters

- First part opens the Survey123 web app: <https://survey123.arcgis.com/share/>
 - (To load the field app use: [arcgis-survey123://?itemID=](https://survey123.arcgis.com/share/arcgis-survey123://?itemID=))
 - second part loads survey using survey id: Example: [a0dbbde20f2b4d69a1f29aceff8841ad](https://survey123.arcgis.com/share/a0dbbde20f2b4d69a1f29aceff8841ad)
 - Obtain your survey unique identifier from survey123 website
 - Open the survey from the *Collaboration tab* and copy the link
 - URL link will use this format to open a survey:
 - ArcGIS online: <https://survey123.arcgis.com/share/a0dbbde20f2b4d69a1f29aceff8841ad>
 - ArcGIS Enterprise:
<https://survey123.arcgis.com/share/b5a82d03716e4e1b83515aa8b224f064?portalUrl=https://ent108.esri.com/portal>
 - Add **?mode=edit** to open the survey in a browser in edit mode
 - Pass **globalId** to open record for editing (note case sensitive: **change case from GlobalID to “globalId” (only I in Id is capitalized!)**)
- <https://survey123.arcgis.com/share/03d0a5b9005b4589840d3ea02a7d35b4?mode=edit&globalId={globalid}>

Demonstration III

- Tips & tricks for working with Survey123 url links:
 - [Web form url link tips & tricks](#)
 - [Edit survey in the web form](#)
 - [Embed a survey in a dashboard](#)
 - [Survey 123 Website Links](#)
- Sneak peak of beta/what's coming soon
 - Survey123 url link for field app



Review and Questions

- Using Survey123 url links

Summary

In this webinar you learned about many tips & tricks for working with Survey123 including:

1. Working with the Survey123 website & web Designer
2. Using Survey133 Connect
3. What can you do with Survey123 URL links



More Resources

Survey123 GeoNet community

- Product team
- product announcements
- “how-to” blog posts
- **Tips & Tricks** blog posts
- Ask questions & find answers

Survey123 YouTube videos

Esri Early Adopter

- Access beta releases
- Test your workflows
- Provide the product team with feedback

The screenshot shows the Esri GeoNet community page for ArcGIS Survey123. The top navigation bar includes links for Products, Solutions, Support & Services, News, and About. A user profile for Sue Enyedy-Goldner (sue_uc) is visible in the top right corner. The main header features the GeoNet logo and the text "The Esri Community". Below this is a navigation bar with links for Home, My News, Browse GeoNet, Communities, ArcGIS Ideas, and GeoNet Resource Hub. The main content area is titled "All Places > ArcGIS Survey123" and includes a "Following" button and an "Actions" menu. The page is divided into sections: "LATEST BLOG POSTS" with entries like "Updates from Survey123 Early Adopter Community (May 2020)", "Automating Service Applications with Integromat and Dashboards", "Securing data in public surveys (Survey123 web designer)", "Securing data in public surveys (Survey123 Connect)", and "COVID-19 sample surveys for Survey123"; "ASK ARCGIS SURVEY123" with a "Type your question" input field and an "Ask my question" button; and "FEATURED CONTENT" with items like "Hans Christian Andersen Release (3.9)", "Survey123 Tricks of the Trade: Editing records in a web form", and "Survey123 for ArcGIS: Work smarter".

The screenshot shows the ArcGIS Survey123 user interface. The top navigation bar includes a "Search Project" field, a "Global" dropdown menu, and a search icon. The main header features the ArcGIS Survey123 logo. Below this is a navigation bar with links for OVERVIEW and RESOURCES. The main content area is titled "INTRODUCTION" and includes the following text: "Thank you for joining the ArcGIS Survey123 Beta Community! We look forward to your valuable testing and feedback.", "Survey123 releases are typically 6-8 weeks apart. That means we have short and intense periods of testing and build iterations. During these periods we aim to share new builds with you at least once a week.", "Click here for the latest [Announcements](#) of what's happening in Survey123.", "To explore new features, click on [Tasks](#) in the menu on the left of this page. Here we have created a collection of guided tasks to get you going. Also check out the [Documentation](#) for all the latest features and enhancements.", "We ask that you thoroughly test your own surveys with the latest beta version and include some of the new functionality with them where you see fit. Please contribute your feedback through the [User Forums](#).", "Warning: Through this beta program you are being granted access to early versions of Survey123. Please be aware that beta software is provided to you for testing and feedback purposes only. This

Conferences, Webinars and Training

- **Esri Virtual User Conference: July 13-16th, 2020**
<https://www.esri.com/en-us/about/events/uc/registration>
- **Upcoming webinars & events:** <https://www.esri.ca/en-ca/news-events/events/webinars/webinar-schedule>
 - **June 25: Manage your business recovery with ArcGIS**
 - **July 9: New Kid on the Block: ArcGIS Experience Builder**
 - **July 23: The Art of the Possible in 3D**
 - **August 13: From Zero to Data! Acquiring Sources and Transforming Nothing Into Something**
- **Related training courses:**
 - [Field Data Collection and Management Using ArcGIS](#)
 - [ArcGIS Online for Administrators](#)
 - [Get Started with ArcGIS Hub for Your Organization](#)

Thank You

- The recording will be available online at: resources.esri.ca/webinars
- If you have any additional questions about the content presented to you, feel free to contact us:
 - Sue Enyedy-Goldner: senyedygoldner@esri.ca
 - Jasmine Sohal: jsohal@esri.ca

Connect with us @esricanada





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