


Collect Data via Survey123

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Install the Survey123 field app



According to [Esri documentation](#):

1. **Click the survey link or take a picture of the QR code**

CT ES Species Observation Survey Link:

<https://survey123.arcgis.com/share/7ffafce080ad43ecb4583a0e52b828da?open=menu>



2. Follow the prompt to download and install the Survey123 field app.

3. After installation, the Observation survey should open automatically.

Should you have an existing version of the Survey123 app, upgrade it to version 3.13.246 to ensure full functionality. If installing on a laptop, the newest version can be downloaded from the [ArcGIS Survey123 Resources](#) site. Scroll to the bottom of the page and select the appropriate version of the desktop app.

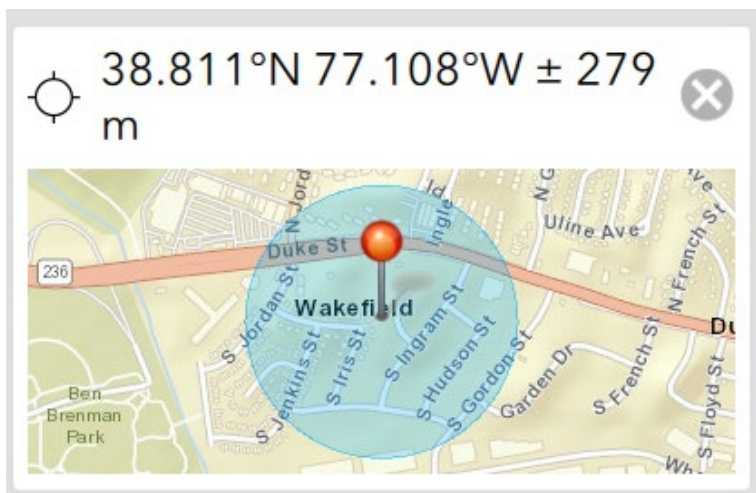
Collect Data

Once the user follows the instructions above regarding installation, the **Observations** survey will automatically be listed within *My Surveys* in the Survey123 field app for subsequent use.

1. Within the Survey123 for ArcGIS app, click the **Observations** survey.
2. Within the Observations survey, click **Collect** to start entering data.

Location

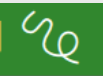

Based on the [Conceptual Feature Type](#) and [Locational Uncertainty Type](#) entered, the Location of Element will either be defined by a Point, Line or Polygon, according to the [Spatial Feature Development Summary](#).



Line and polygon features have the option to draw the location via Sketch (free-form digitize) or Vertex.


Draw Method *

How would you like to map the observation?


Sketch  Vertex 


▼ **Location of Element:**

Click the icon below to map the location








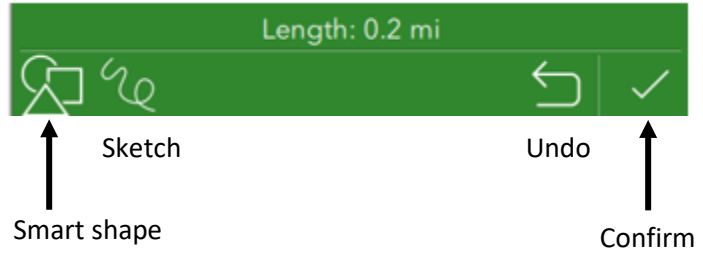
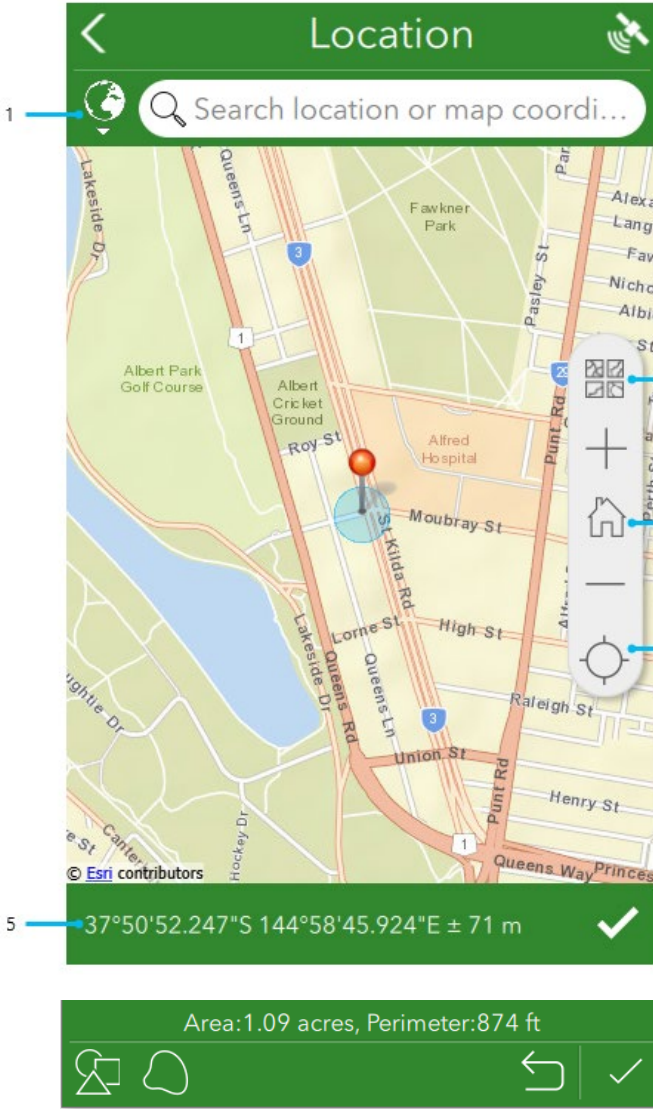
Sketch

The Sketch method is used to capture the geometry in a single motion, with the capture completing once the user has stopped drawing this single line. To begin capturing Sketch geometry, tap the Sketch button  in the lower left of the map page and tap the map. When you have finished sketching the geometry, stop tapping the map. The geometry is then complete, with the geoshape connecting the beginning and end of the shape if necessary. The length of a geotrace, or the area and perimeter for a geoshape, is displayed below the map.







The Sketch method also provides a smart shape option, which attempts to simplify your sketched geometry into an ellipse, rectangle, or triangle. To use smart sketching, tap the Smart Shape button  in the lower left corner of the map page, and tap the map to begin sketching. If your sketch is recognizable as an ellipse, rectangle, or triangle, the app automatically converts it. If your sketch doesn't resemble one of these shapes, no geometry is drawn.

Vertex

The Vertex method allows more precise geometric capture of a line or shape by placing vertices that connect together. To begin capturing Vertex geometry, tap the Vertex button  in the lower left of the map page and tap the map to place your first vertex. More vertices can be placed by tapping the map again or tapping the Capture Vertex at Location button  to place a vertex at your device's location (this enables you to map an area or transect as you walk). To move the map instead of placing vertices, tap the Pan and Zoom button  to change map interactions to navigation mode. You can then capture a vertex at the map's central point with the Capture Vertex at Crosshair button . If at any point you place a vertex at the wrong position, tap the Undo button  in the lower right to remove the last vertex placed, drag the point to move it to a new location, or drag the point to the Delete button that appears in the upper left of the map window. When you're done, you can tap the Confirm button to accept this geometry and move back to your survey.



According to the [Quick reference](#), callouts in the image above are detailed as follows:

1. The geosearch bar allows you to locate an address or point of interest by searching for it, before snapping your geopoint and map to that location. The globe icon next to the search bar provides options to limit the extent of the geosearch capability, and to change the geocoder being used. For more information, see [Geosearch and geocode](#).
2. The Basemap button  provides a number of alternative basemaps to the default, for a range of different purposes. This is also where any directly associated basemaps can be selected.
NOTE: Should you require basemaps for offline use, see the [Prepare basemaps for offline use](#) and [Use offline basemaps](#) topics.
3. Home  returns the map marker to where the survey creator has defined a home location. If no home location has been defined, it instead returns the marker to the user's location.
4. The Location icon  is first displayed in black, indicating the location sensor is disabled. Select the button to switch to Navigation mode , enabling Location and tracking the device's current location. Moving the map marker from here, either directly on the map or by changing the coordinates, changes the location and coordinates of the answer, but the device's location remains visible as a pulsing blue dot while doing so. When this happens, the button switches to an Active Location icon ; select it to return to Navigation .
5. The coordinates of your current location are listed here, using the coordinate format that has been set for that survey in Survey123 Connect. Pressing the area copies the location coordinates into the geosearch bar, allowing you to define a different location. Altitude is also included here if it has been enabled for the question. For more information, see [Geopoints](#). In addition, pressing and holding these coordinates will perform a reverse geocode to give you the location, placed above the coordinates. As with the coordinates, pressing the location will copy it into the geosearch bar.

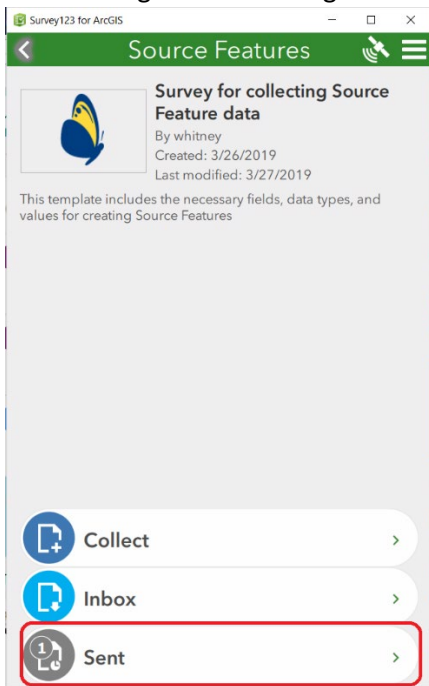
[Copy a collection and edit it \(if there are two elements/different species in the same location\):](#)

There are two ways to copy data from a single collection to replicate it in subsequent collections, to minimize data entry.

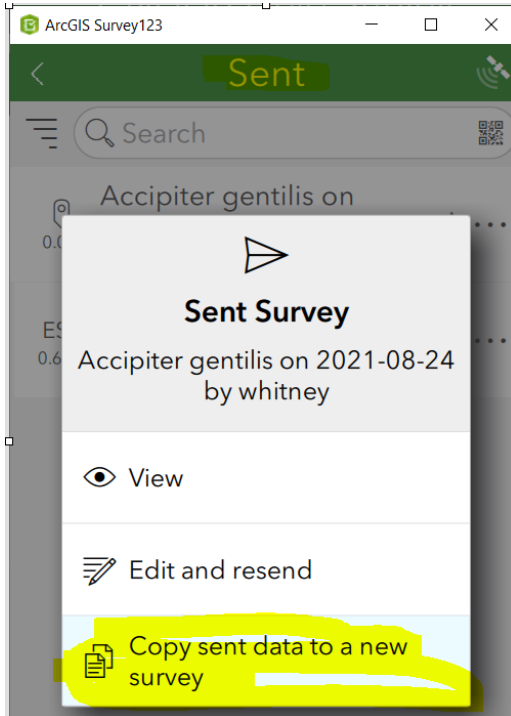
- **Copy** (previously sent survey responses): includes locational data and all survey responses with the exception of Attachments.
- **Favorite answers:** do not include locational data; overwrites responses with default values, when default values are assigned. Do not include Attachments.

Sent surveys copies all of the survey responses without overwriting or omitting any responses.

1. After having sent in the original collection, go to the **Sent** section



2. Select the data collected via the List or Map and click **Copy sent data to a new survey**.

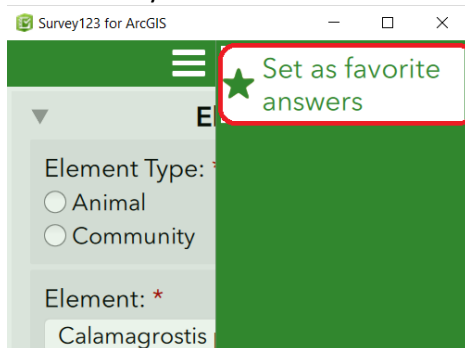


- a. Edit the data for the second collection.
- b. Repeat as necessary!

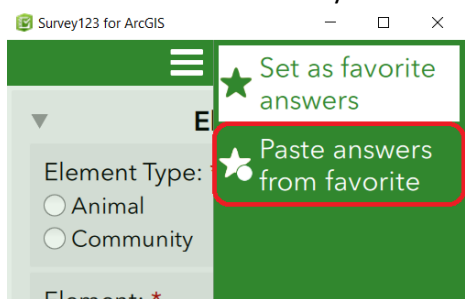
Favorite answers

Favorite answers facilitate entering repetitive information in subsequent surveys. **NOTE:** Favorite answers do not include the location information and questions which have default values are overwritten by the default.

1. Complete a survey response with your preferred answers.
2. Before submitting the response, using the menu in the upper right corner, choose **Set as favorite answers** to set the current state of your survey to act as your favorite answers. The saved survey is now marked with a star icon in the **Sent** list.



3. Once you've set your favorite answers, the **Paste answers from favorite** menu becomes available. Select it to enter your favorite answers into your new survey.

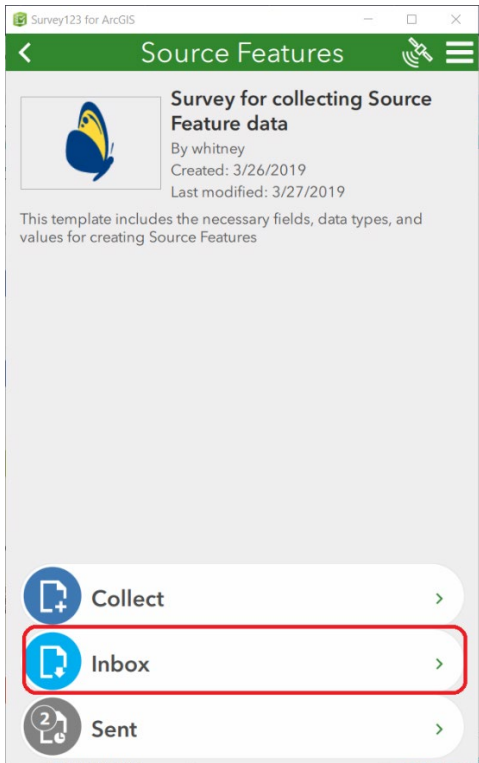


4. To change your favorite answers, enter changes into your current survey and click **Set as favorite answers**.

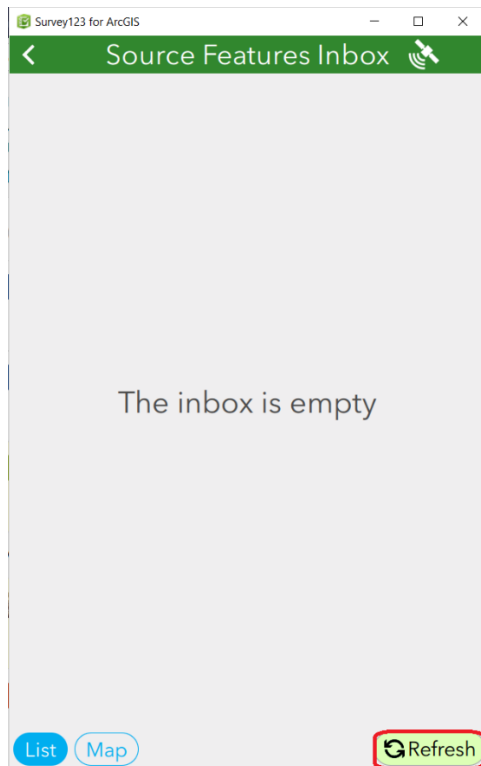
Retrieve collections from a previous session

The following functionality is only feasible if, within Survey123 Connect, the *Inbox mode* setting is set to **Enabled** – **The Inbox folder will be available for this survey**, prior to publishing. The data available within the Inbox (for example, data collected on another day or by another user) is defined by the *Where*, if specified.

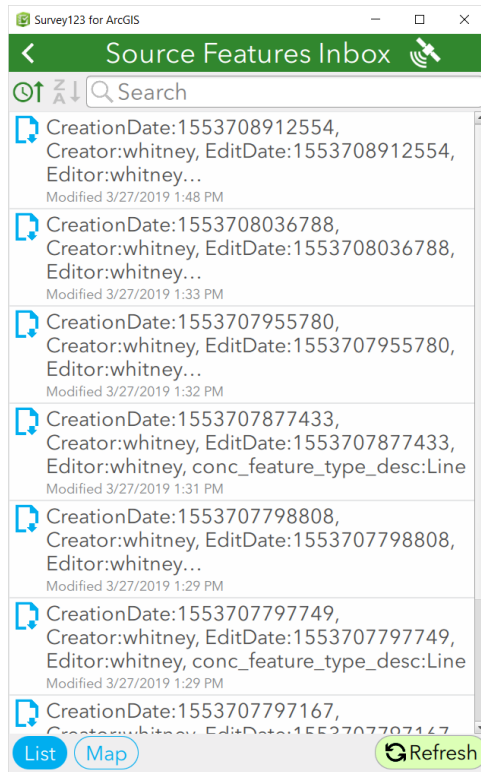
1. From the Inbox



a. Click Refresh



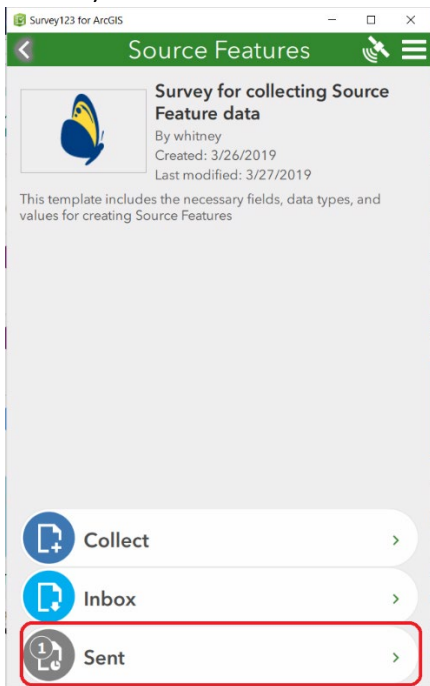
b. Select the desired collection via the List or Map view



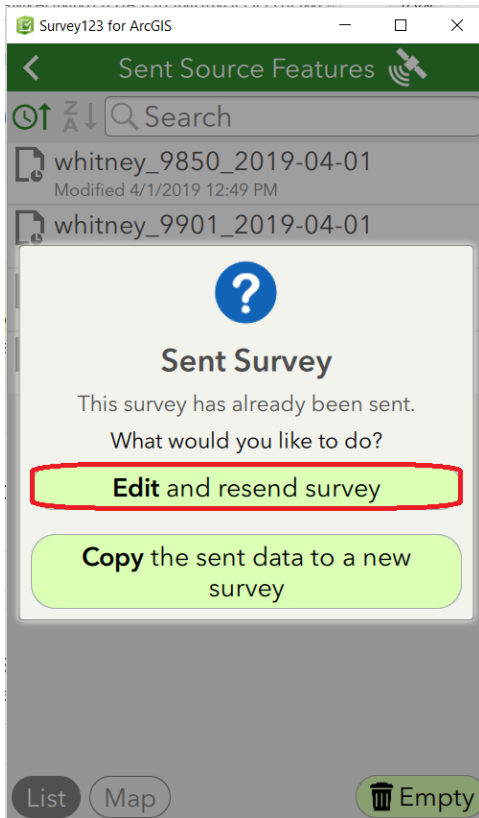
c. Edit as desired.

Edit existing data

1. Select **Outbox** (if not Sent), **Sent** (if already Sent), as shown below, or **Inbox** (if sent in a previous session):



2. Select the data collected, via the List or Map, and click **Edit and resend survey**.



3. Edit the data as desired.