

Using Survey123

Survey123 is a beta application in development by Esri Labs to design surveys, collect data in the field, and migrate that data into ArcGIS Online and ArcGIS desktop. Survey123 uses XLSForms to design survey forms and ArcGIS Online to manage the data.

Steps for using Survey123:

1. Download Survey123 Connect at the bottom of this webpage: <http://survey123.esri.com/#/home>
2. Sign in with your ArcGIS Online account. This will allow you to publish your survey and share it with others.
3. Design your survey using XLSForms. There are many resources available to assist you in this.
 - a. This YouTube video (14 minutes) is a good place to start <https://www.youtube.com/watch?v=0gGQbCuPRQI&list=PL2hNiZRjxo9O510LUg4RCcH3rucrQge0&index=1>
 - b. This website is a great resource to the fields in customized forms and the variety of ways you can set up and nest questions: <http://survey123.esri.com/resources/XLSFormSupport/>
 - c. It is a best practice to make incremental changes to your form and save often. This way, if there are any errors in your form you can more easily pinpoint them based on what you have changed since your last save.
4. Some content from the XLSForm guide that is particularly useful:
 - a. **The survey worksheet:** This worksheet gives your form its overall structure and contains most of the content of the form. It contains the full list of questions and information about how they should appear in the form.
 - b. **The choices worksheet:** This worksheet is used to specify the answer choices for multiple choice questions. Each row represents an answer choice. Answer choices with the same list name are considered part of a related set of choices and will appear together for a question.
 - c. **The survey worksheet has 3 mandatory columns: type, name, and label.**
 - i. The **type column** specifies the type of entry you are adding.
 - ii. The **name column** specifies the unique variable name for that entry. No two entries can have the same name.
 - iii. The **label column** contains the actual text you see in the form.
 - d. **The choices worksheet has 3 mandatory columns as well: list name, name, and label.**
 - i. The **list name** column lets you group together a set of related answer choices, i.e., answer choices that should appear together under a question.
 - ii. The **name column** specifies the unique variable name for that answer choice.
 - iii. The **label column** shows the answer choice exactly as you want it to appear on the form. Alternatively, label translation columns can be used.
5. When you are satisfied with your survey, you can upload it to ArcGIS online from Survey123 Connect. Next, sign in to <http://survey123.esri.com/> using your ArcGIS online account information. Under 'My Surveys', find your newly uploaded survey. Click on the share button below the survey icon (next to the trash can icon) and choose to share your form with 'Members of your organization'. This website is also where you will go to review responses to surveys you design and download your survey data.

