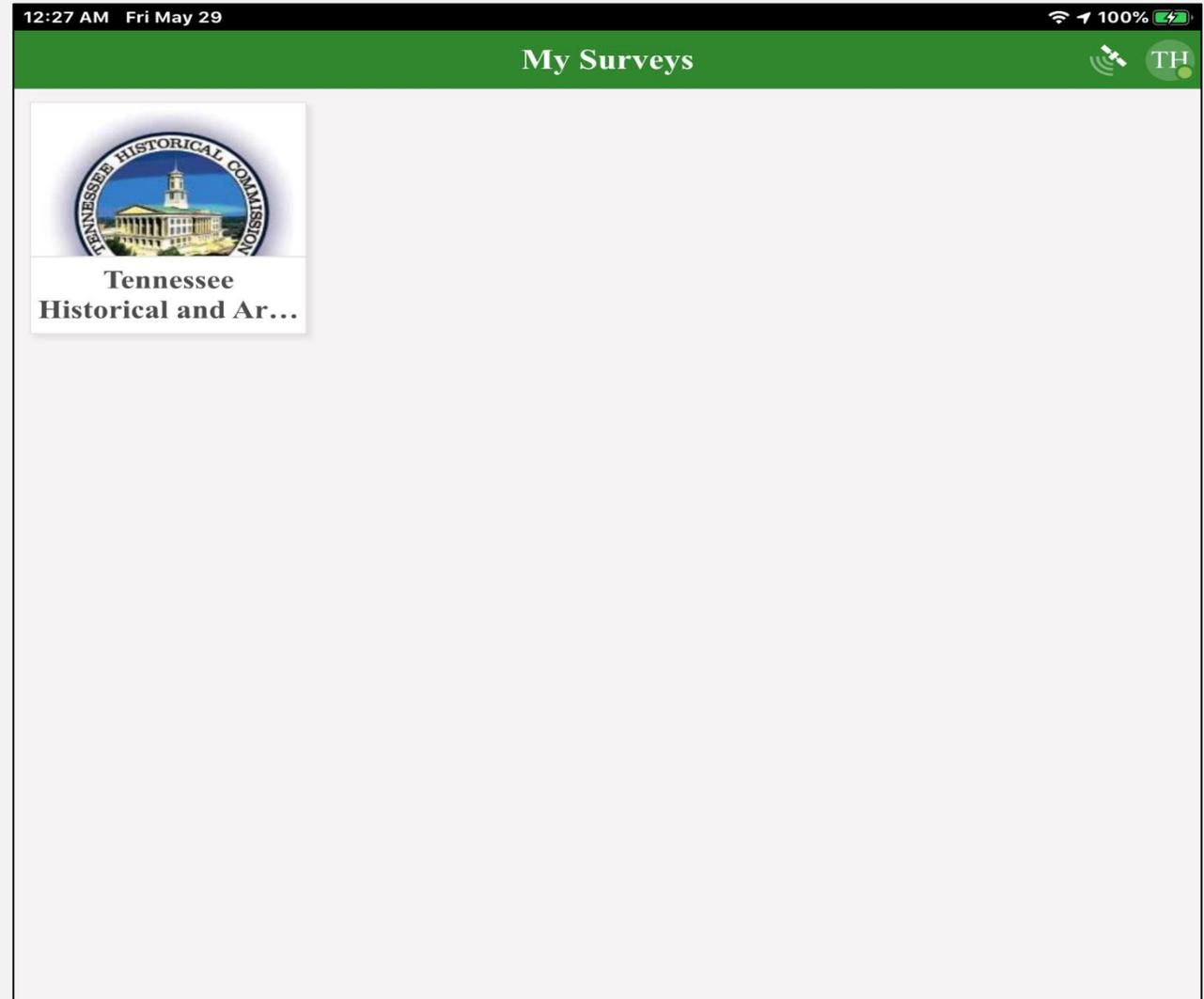


Survey123 For ArcGIS
by ESRI

Collecting, Editing, and Submitting Survey Data

My Surveys

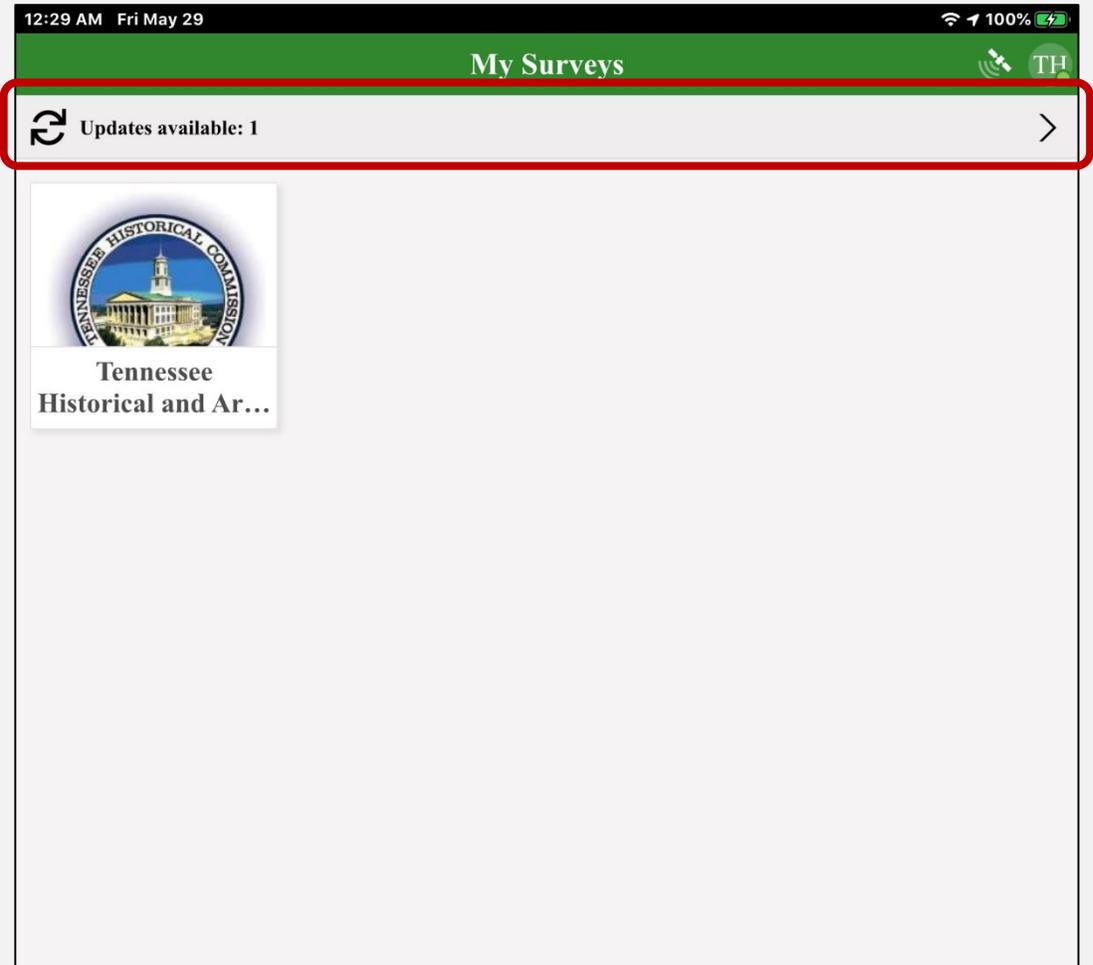
After a survey has been downloaded, it will now appear in your “My Surveys” page.



Updating the Survey Form

On occasion, there may be a notice at the top of your “My Surveys” page that there is an update to your survey form (this is different from a NEW survey form):

Simply touch this notice to be taken to the update screen.

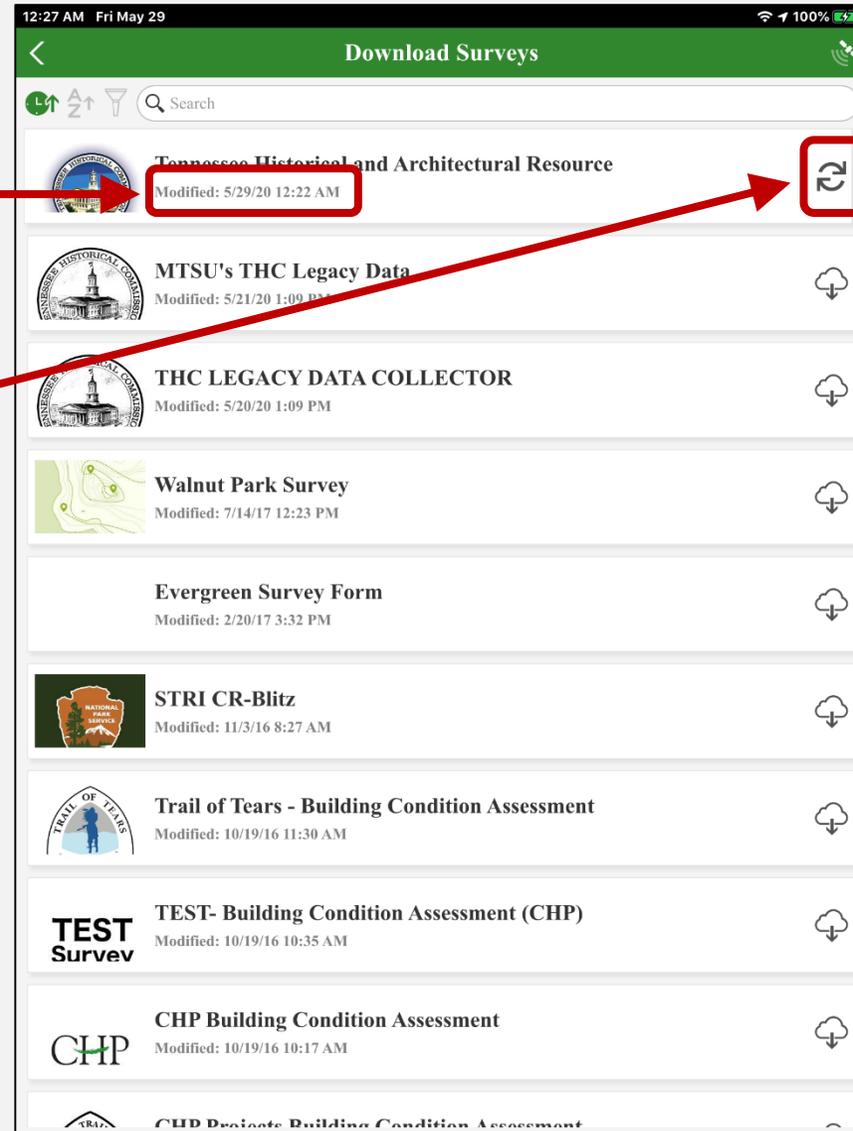


Updating the Survey Form

You can see the date of the most recent update here:

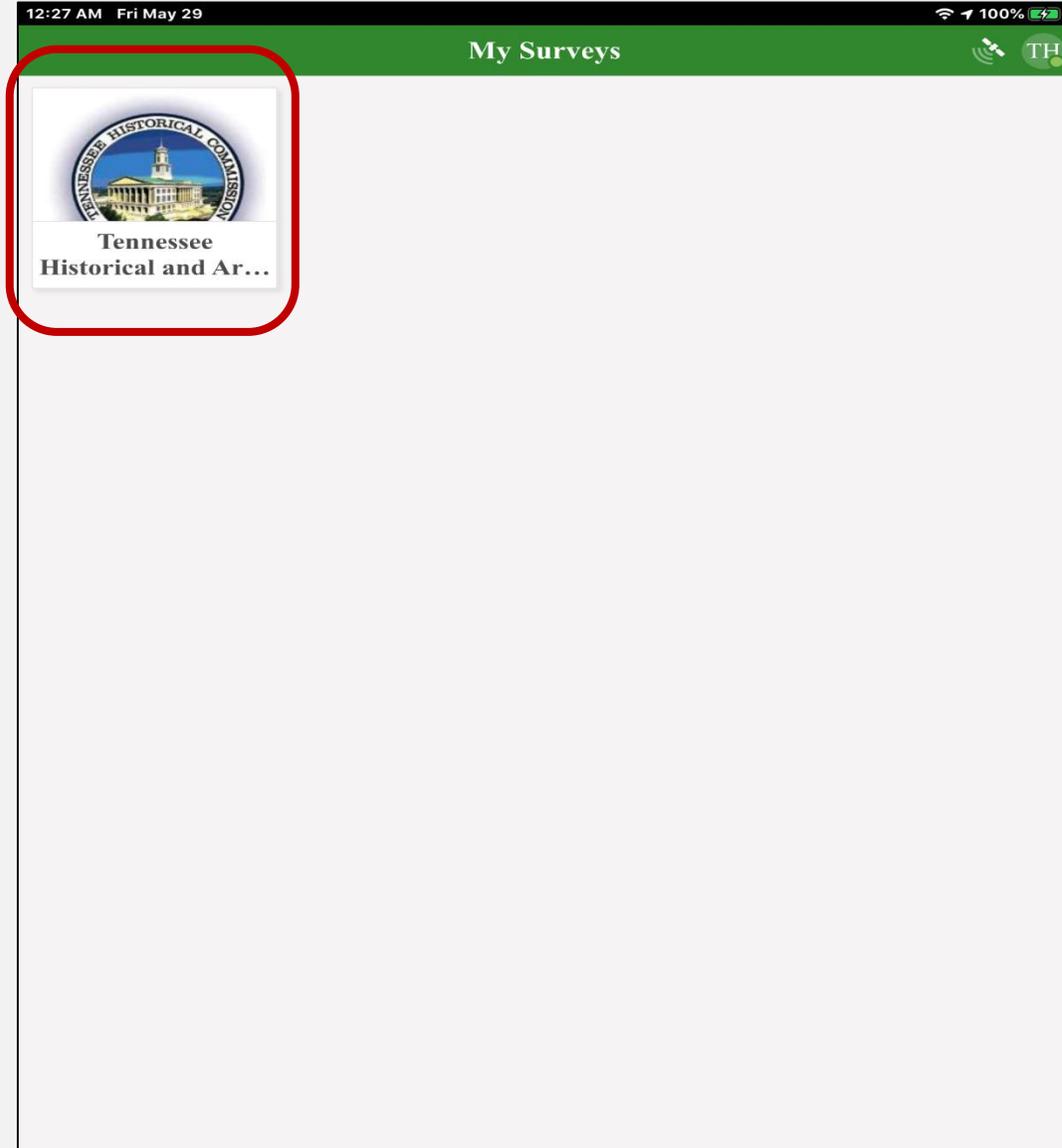
Touch or click the “cloud/circled arrow” button to download the update:

After this is complete, touch the back arrow to go back to “My Surveys”.

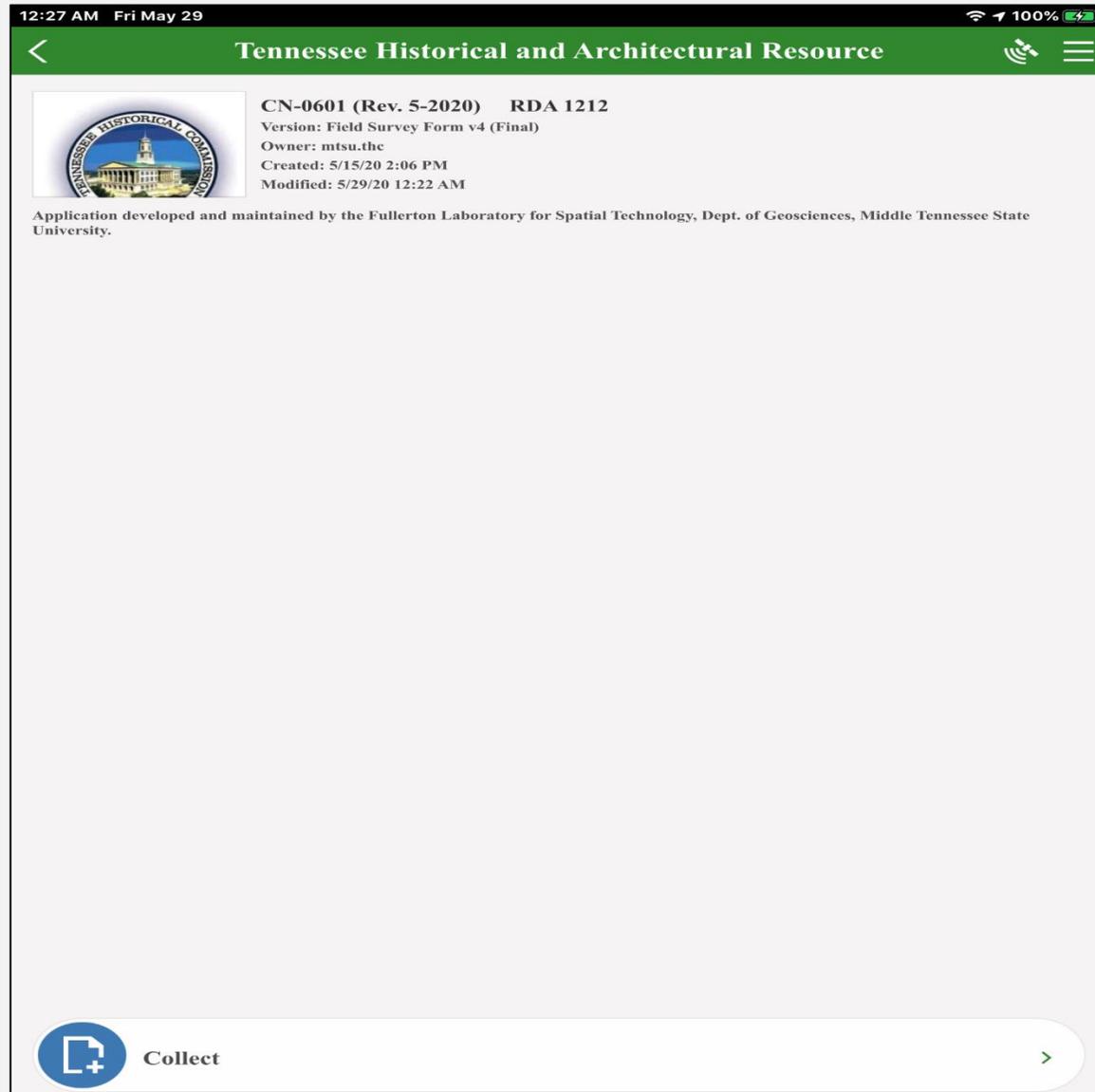


Accessing the Survey Form

Touch or click the selected survey icon to begin collecting data:



The Survey Form



This is the page where you can actually start collecting data on the survey form.

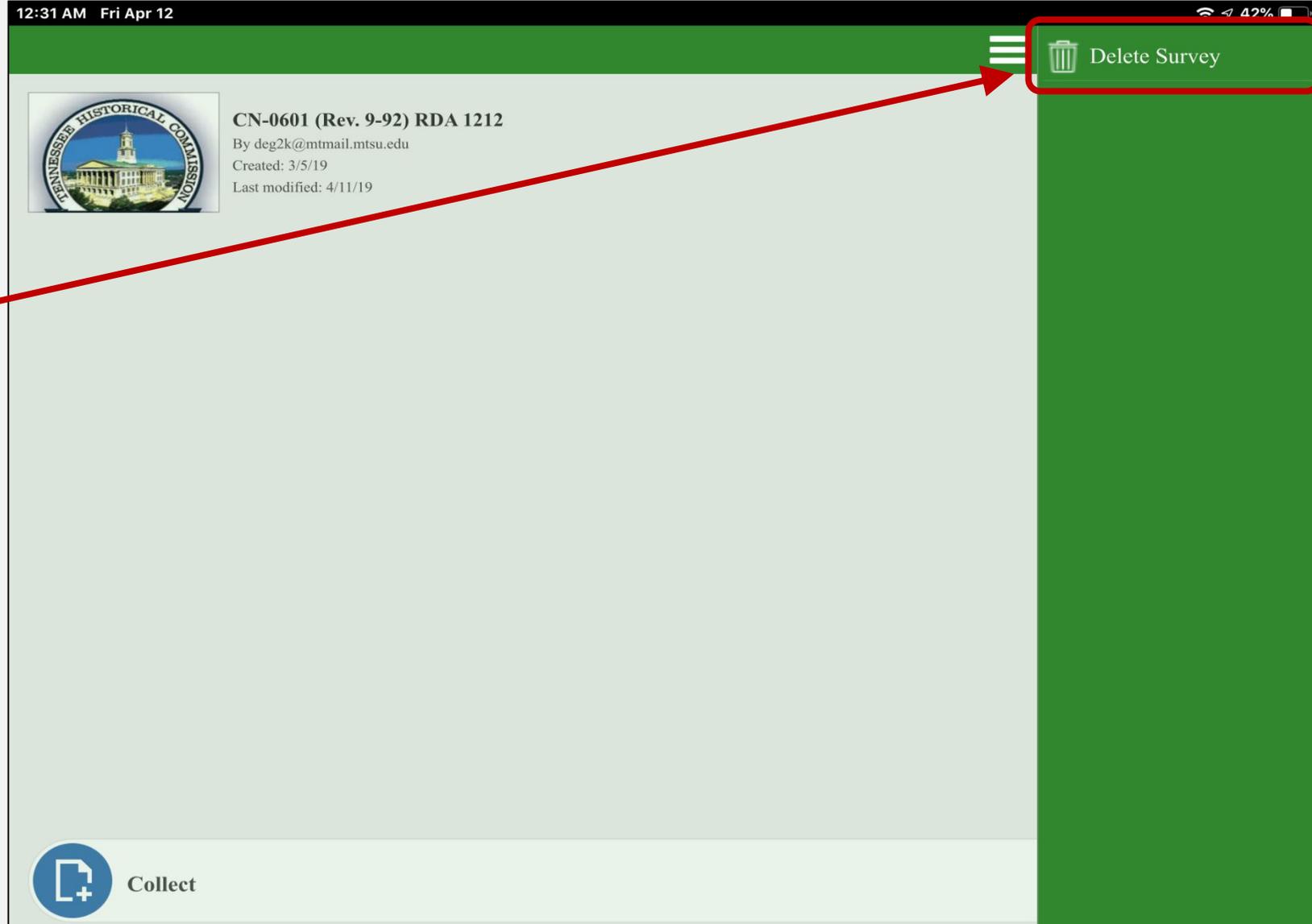
There are also several other settings and/or options that can be accessed from this page.

Deleting the Survey Form

Sometimes, enough changes are made to a survey form that an entirely new survey form may be published. When this happens, you should delete the original survey form* currently on your device by touching or clicking the icon/menu in the upper right corner:

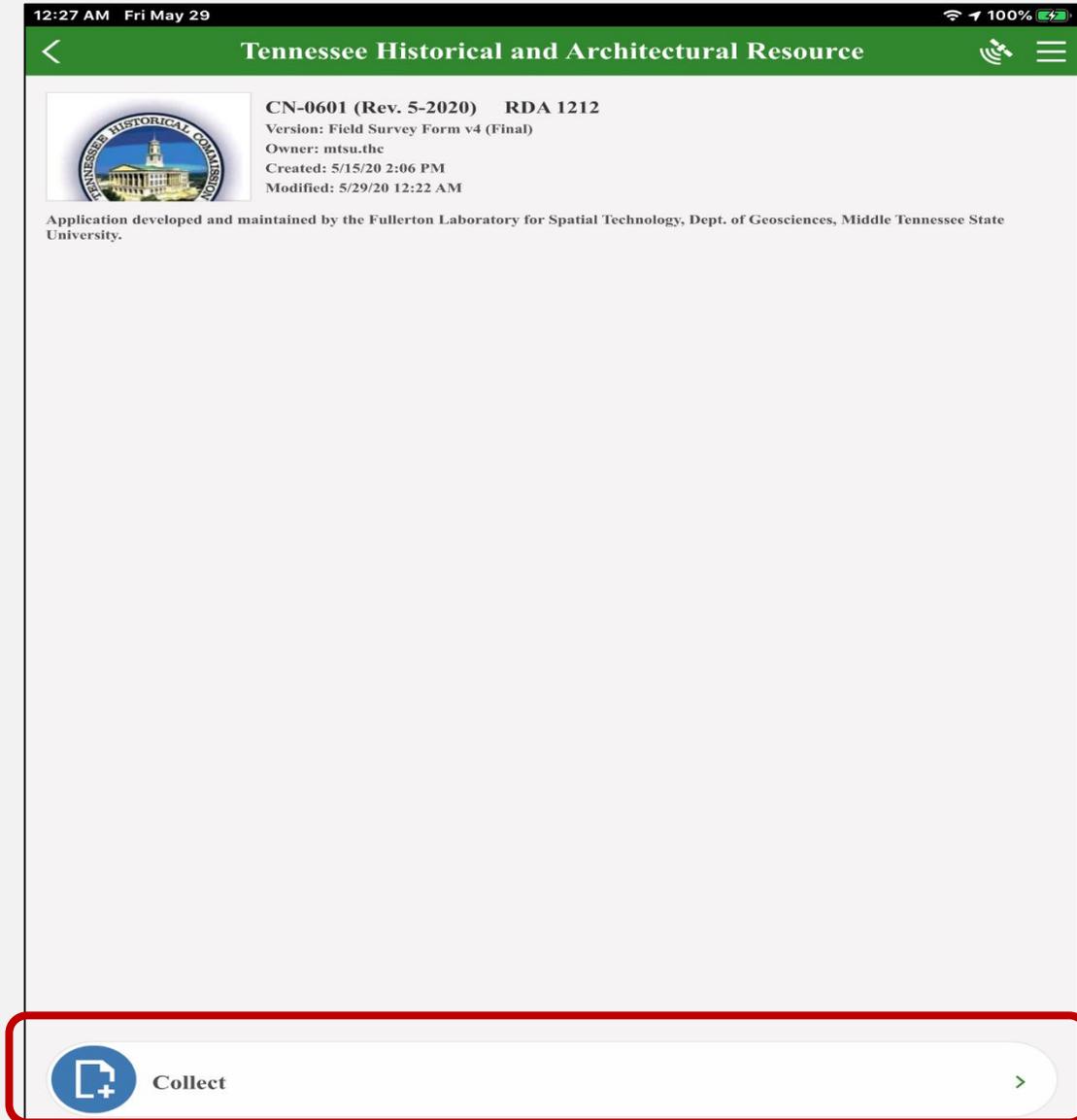
Then download the new survey form using one of the previously described methods.

*Deleting a survey form will also delete any previously unsubmitted survey form data (drafts), or unsent survey forms (outbox)!



Beginning the Survey

When you are ready to start the survey—to begin collecting data—click or touch the “Collect” button:



Collecting Data

This is the survey form itself.

Fields marked with an asterisk (*) MUST be filled in before the survey form will be allowed to be submitted:

The screenshot shows a mobile web browser interface for a survey form. At the top, the browser status bar shows 'Safari 12:24 AM Fri May 29' and '100%' battery. The page title is 'Tennessee Historical and Architectural Resource'. Below the title is the seal of the State of Tennessee, featuring a plow, a sheaf of wheat, and a cotton plant, with the words 'AGRICULTURE' and 'COMMERCE' and the year '1796'. The text below the seal reads: 'Tennessee Historical Commission', 'State Historic Preservation Office', and '2941 Lebanon Pike Nashville, TN 37214'. The form is titled 'Property Details' and contains several required fields, each marked with a red asterisk (*):

- Survey Date ***: A date picker showing 'Friday, May 29, 2020'.
- Surveyor Name ***: A text input field containing 'Joe Q. Public'. A red box highlights the asterisk, and a red arrow points from the text 'Fields marked with an asterisk (*) MUST be filled in...' to this field.
- Surveyor Email ***: A text input field containing 'Example@email.com'.
- Surveyor Affiliation ***: A text input field containing 'The Survey Company'.
- Project ID ***: A text input field containing 'Test Project 1'.
- County ***: A dropdown menu showing 'Davidson'.
- Field Number ***: A text input field (partially visible at the bottom).

Each field has a small 'x' icon in the top right corner. At the bottom right of the form, there is a blue checkmark icon.

Collecting Data, cont.

If a required field is skipped, touching or clicking the submit button will take you back to the first unfilled field:

3:36 PM Fri Nov 1

Tennessee Historical and Architectural Resources

Please check for updated survey form! Delete this form and download the new one (if available).

Property Details

Survey Date *

Friday, November 1, 2019

! "SURVEYOR NAME" REQUIRED

Surveyor Name *

Surveyor Affiliation *

Project ID *

Use the same Project ID for all properties in a project survey

County *

Field Number *

use HS-1, HS-2, HS-3, etc...

Collecting Data, cont.

Fields with a downward arrow are dropdowns; it also has a text search ability:

2:27 PM Tue Mar 19

Tennessee Historical And Architectural Resource

Property Details

Survey Date *
Date

Surveyor Name *

Surveyor Affiliation *

Project ID *

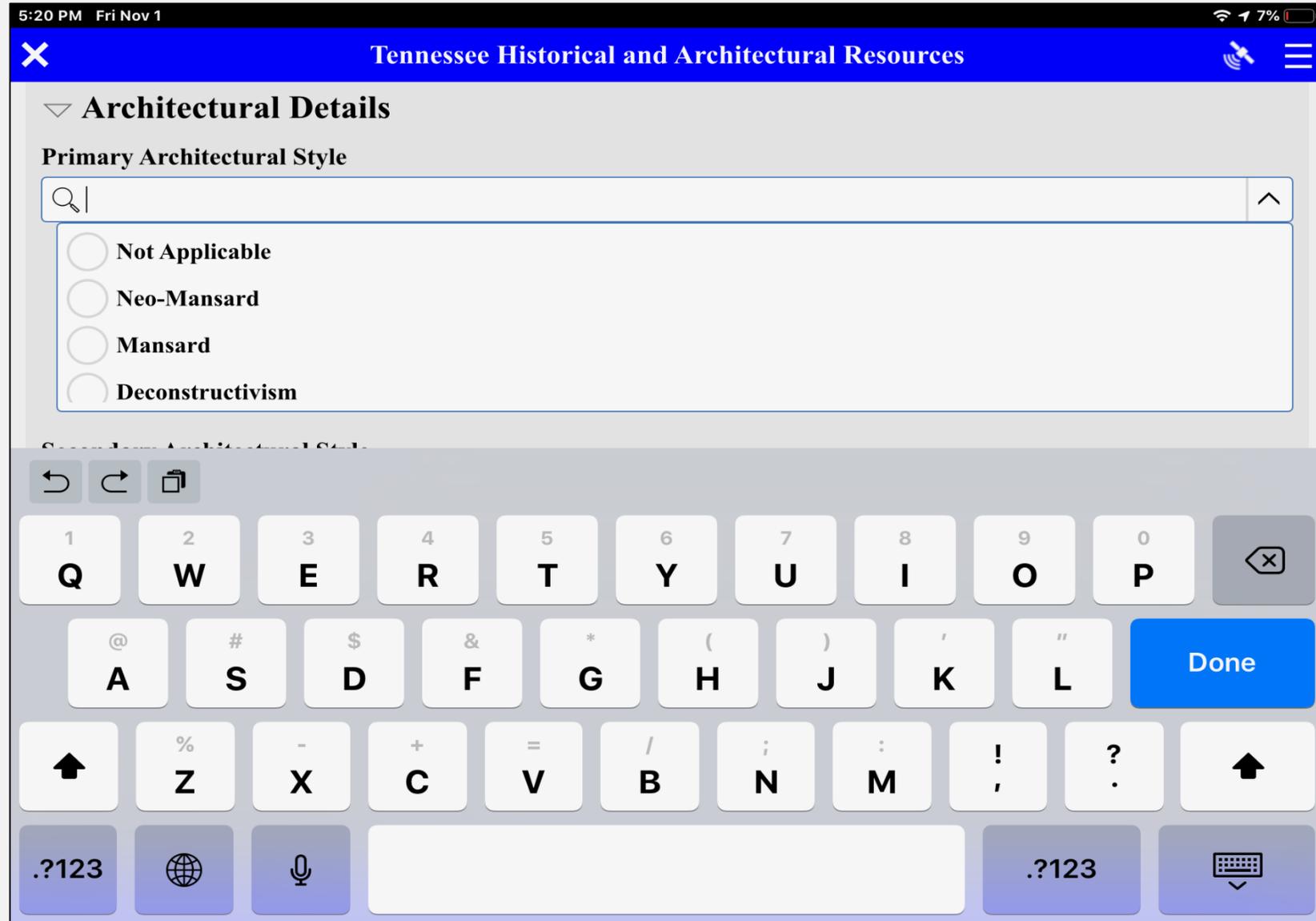
County *

Field Number *
use HS-1, HS-2, HS-3, etc...

Historic Name
(eg. "The Walking Horse Inn"); 'N/A' is also acceptable

Collecting Data, cont.

The text search ability can be used to narrow the choices on the selection list.



Collecting Data, cont.

Fields without an arrow are text boxes, with a 255 character limit:

2:27 PM Tue Mar 19

Tennessee Historical And Architectural Resource

Property Details

Survey Date *
Date

Surveyor Name *

Surveyor Affiliation *

Project ID *
(Red box highlights this field)

County *

Field Number *
use HS-1, HS-2, HS-3, etc...

Historic Name
(eg. "The Walking Horse Inn"); 'N/A' is also acceptable

Collecting Data, cont.

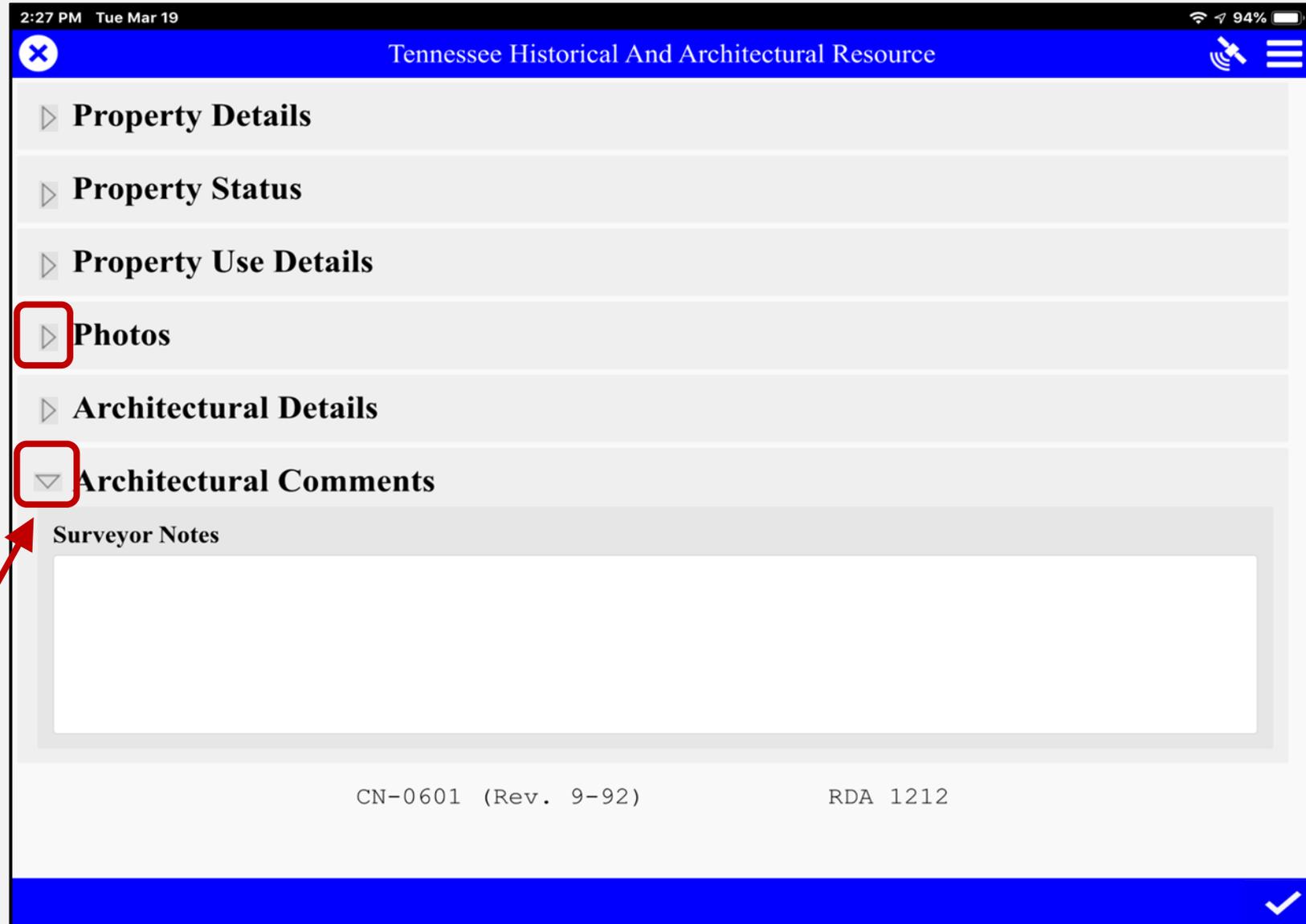
Wide text boxes have a
500 character limit:

A screenshot of a mobile application interface for the Tennessee Historical And Architectural Resource. The interface features a blue header with a close button (X), the title 'Tennessee Historical And Architectural Resource', and navigation icons (signal, location, and menu). Below the header is a list of expandable sections: 'Property Details', 'Property Status', 'Property Use Details', 'Photos', 'Architectural Details', and 'Architectural Comments'. The 'Architectural Comments' section is expanded, revealing a 'Surveyor Notes' section with a large, empty text input field. At the bottom of the screen, there is a footer with the text 'CN-0601 (Rev. 9-92)' and 'RDA 1212', and a blue bar with a white checkmark icon in the bottom right corner.

Collecting Data, cont.

Category arrows that are pointed to the right indicate a collapsed group of questions:

Category arrows that are pointed down indicate an open one:



Collecting Data, cont.

Round (radial) selection buttons indicate a “select one” option:

3:07 PM Tue Mar 19

Tennessee Historical And Architectural Resource

Property Status

National Register Eligible?

Yes

No

Eligibility Determined By:

Surveyor Staff Opinion Consensus Formal Listed

Historical Comments

Anecdotes, Oral Histories, Proximity To / Relation To Other Historical Properties...

Property Use Details

Theme

Comprehensive Planning Theme 1

Early Exploration Early Settlement Agriculture Commerce & Industry Transportation Religion/Philosophy Movements Political/Government

Collecting Data, cont.

Square selection buttons indicate a “select multiple” option:

4:43 PM Fri Nov 1

Tennessee Historical and Architectural Resources

Secondary Architectural Style

Style Other

Construction

Frame Log Brick Stone Steel Concrete Block Concrete Panel

Formed Concrete Post & Beam Other

Construction Other

Number of Stories

Story 1.5 Stories 2 Stories 2.5 Stories 3 Stories 4 Stories 5 Stories

> Story

Roof Configuration

Geopoint Data

This is where you will collect/define your location data. If your device is unable to automatically collect your location, the map defaults to a pre-set, specific location—in this case, the Tennessee Historic Commission offices at Clover Bottom Mansion:

4:22 PM Fri Nov 1

Tennessee Historical and Architectural Resources

Other Maps
Parcel and/or Tax Maps

Property Location
36.170°N 86.649°W ± 65 m

Year of Construction
+/-5 years; No "circa" dates

2019

Builder

Property Status

Geopoint Data, cont.

You can request/force your device to attempt to capture your current location by clicking or touching the location icon:



4:22 PM Fri Nov 1

Tennessee Historical and Architectural Resources

Other Maps
Parcel and/or Tax Maps

Property Location
36.170°N 86.649°W ± 65 m

Year of Construction
+/-5 years; No "circa" dates

2019

Builder

Property Status

Geopoint Data, cont.

You can also manually orient your location.

Begin by clicking or touching anywhere on the map image to open the full map page:

4:22 PM Fri Nov 1

Tennessee Historical and Architectural Resources

Other Maps
Parcel and/or Tax Maps

Property Location
36.170°N 86.649°W ± 65 m

Year of Construction
+/-5 years; No "circa" dates

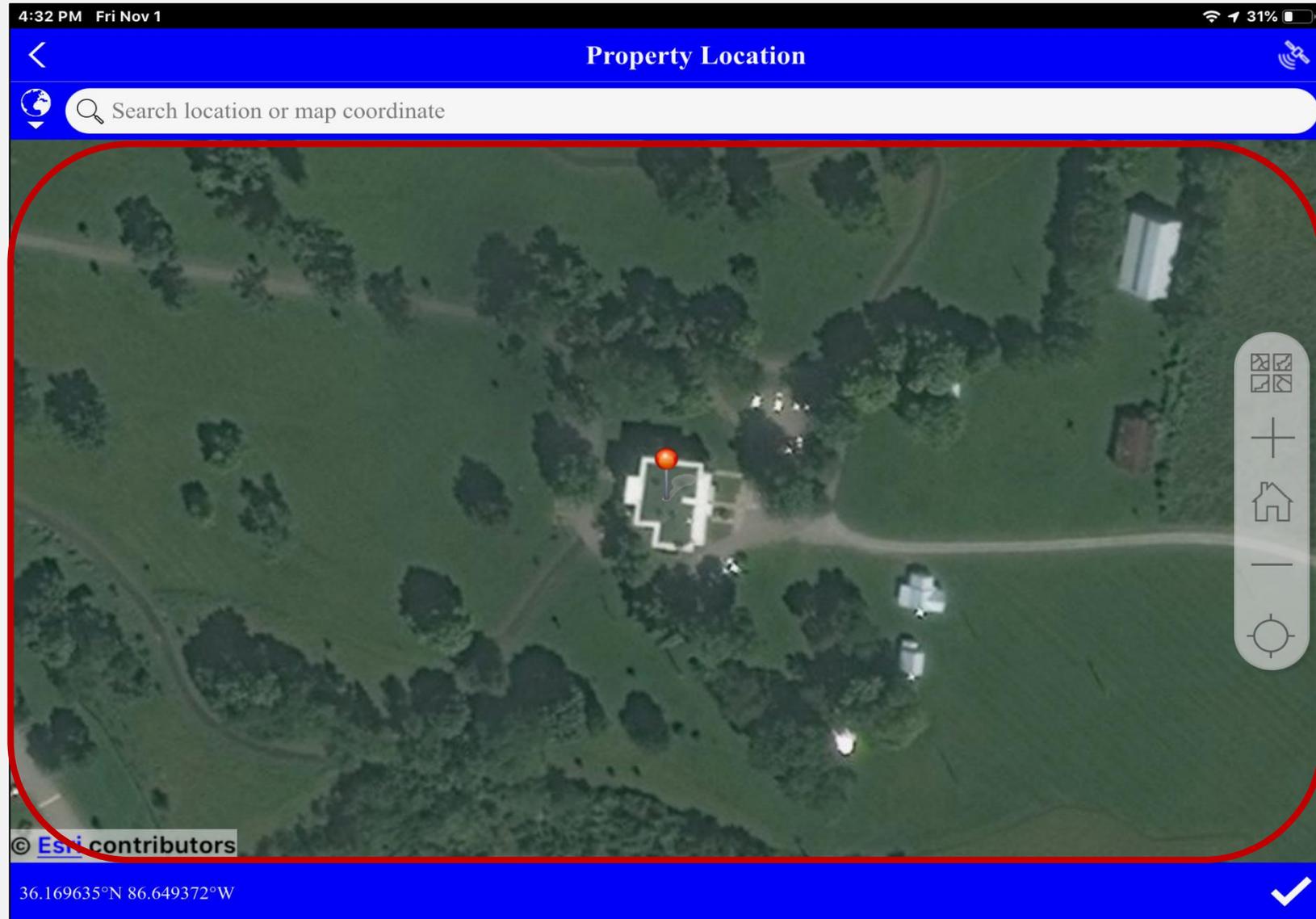
2019

Builder

Property Status

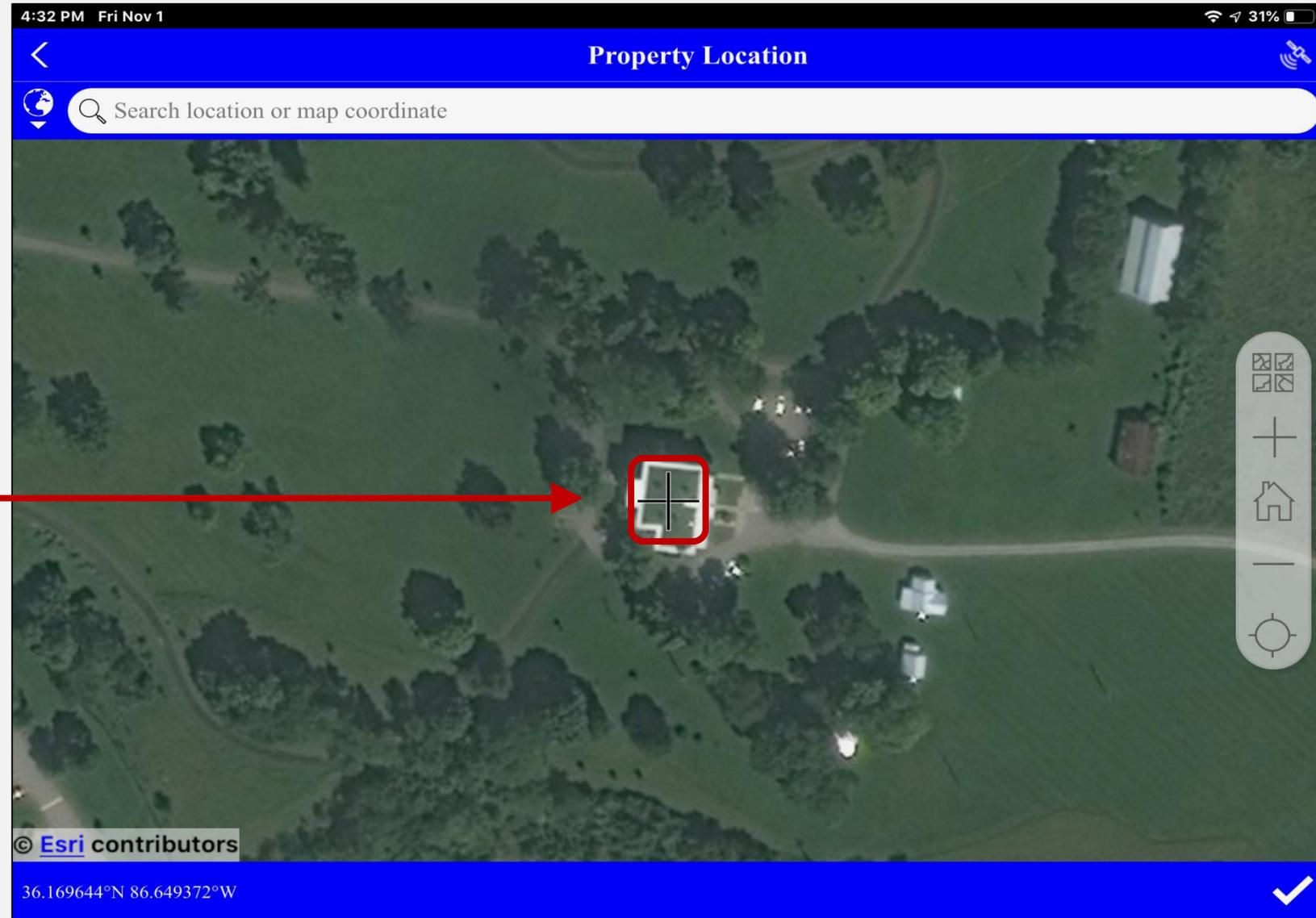
Map Options

You can touch or click anywhere on the map itself to drop the pin to the desired location:



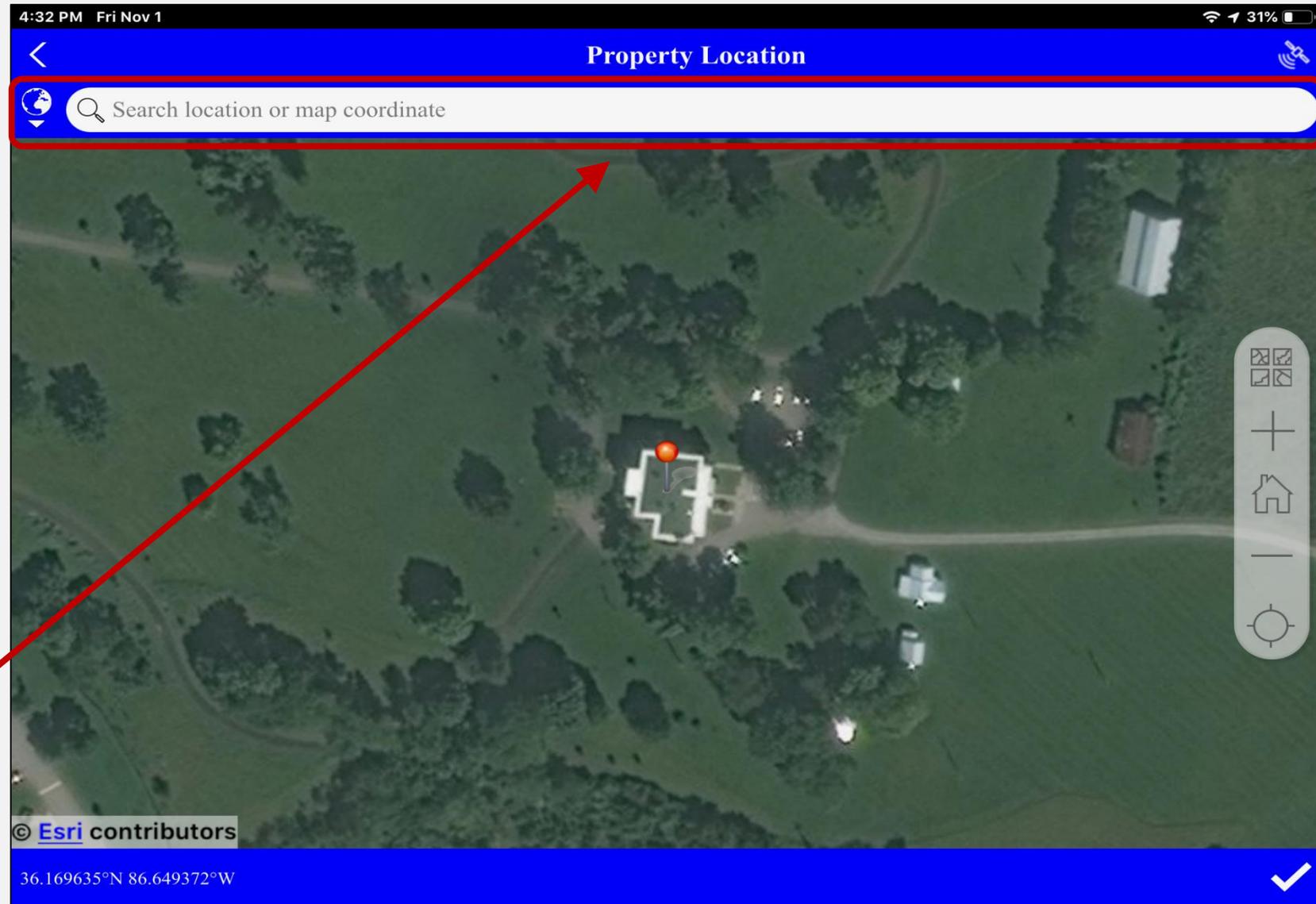
Map Options

If you choose to drag the map to the desired location, you will see these crosshairs; this is where the pin will drop when you stop moving the map:



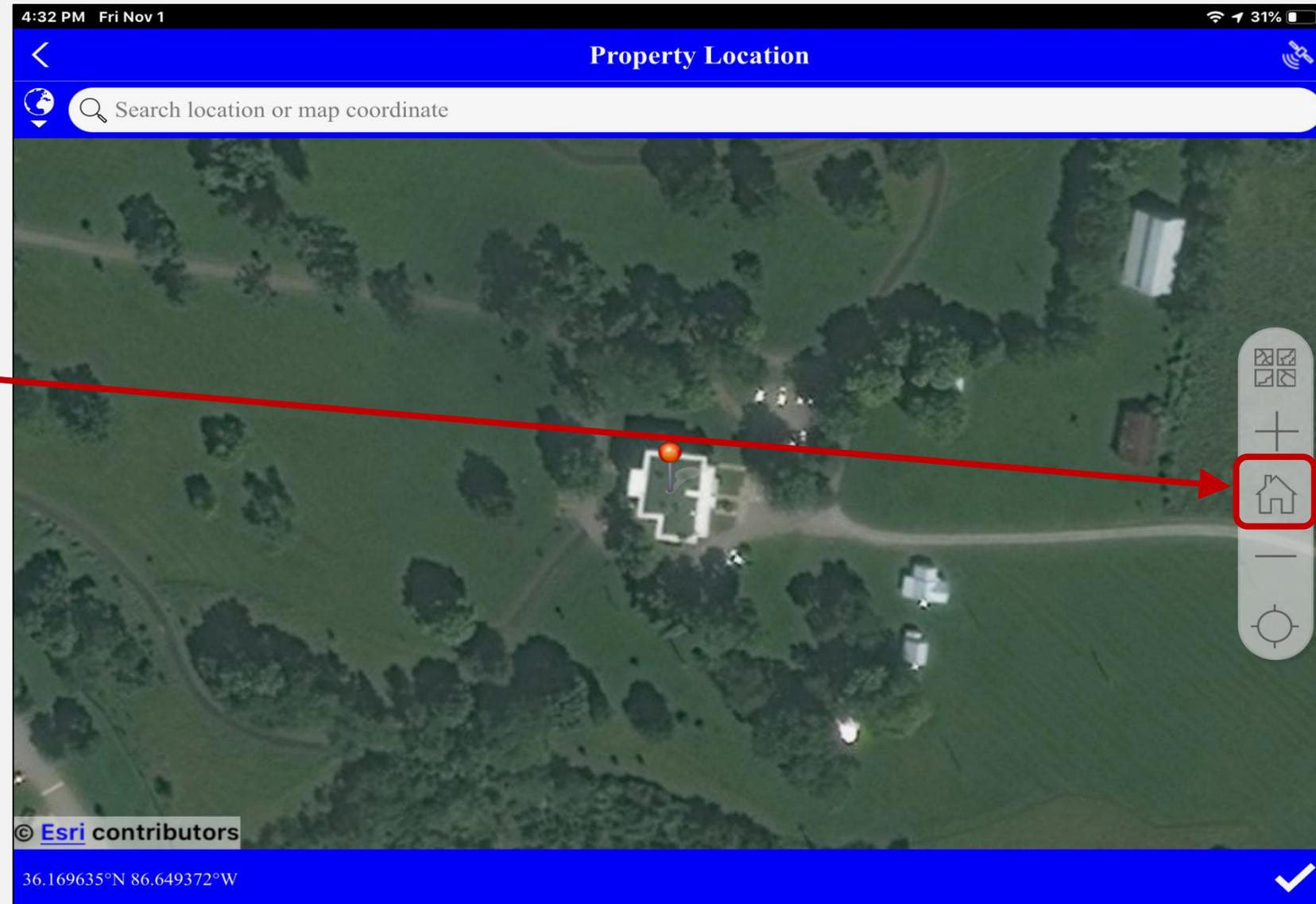
Map Options

You can also search for a specific location using the search box, which will accept anything from a county, to a city, to a street address, or even map coordinates:



Map Options

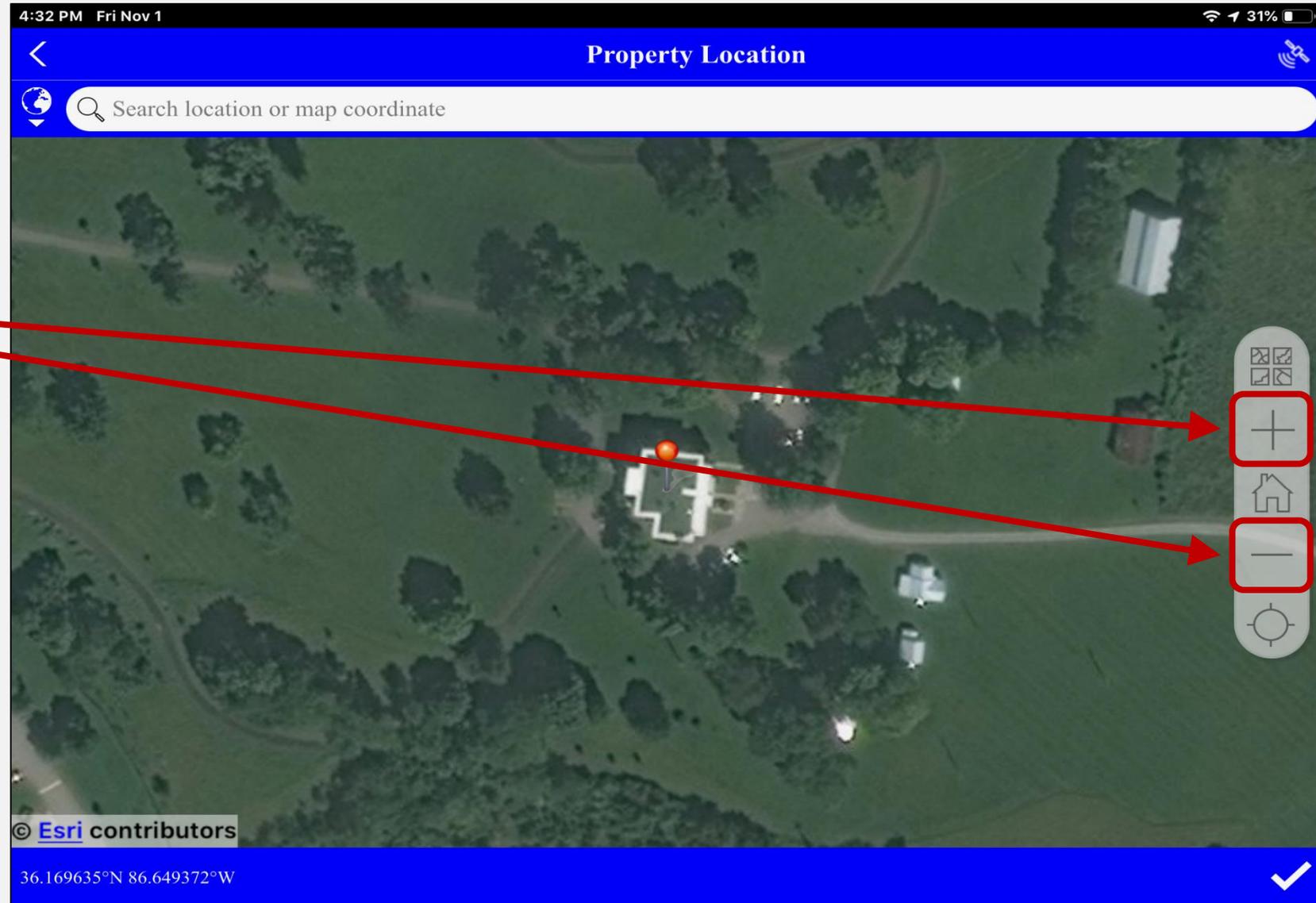
Touch or click the house icon at any time to return to the pre-set "home" location:



Map Options

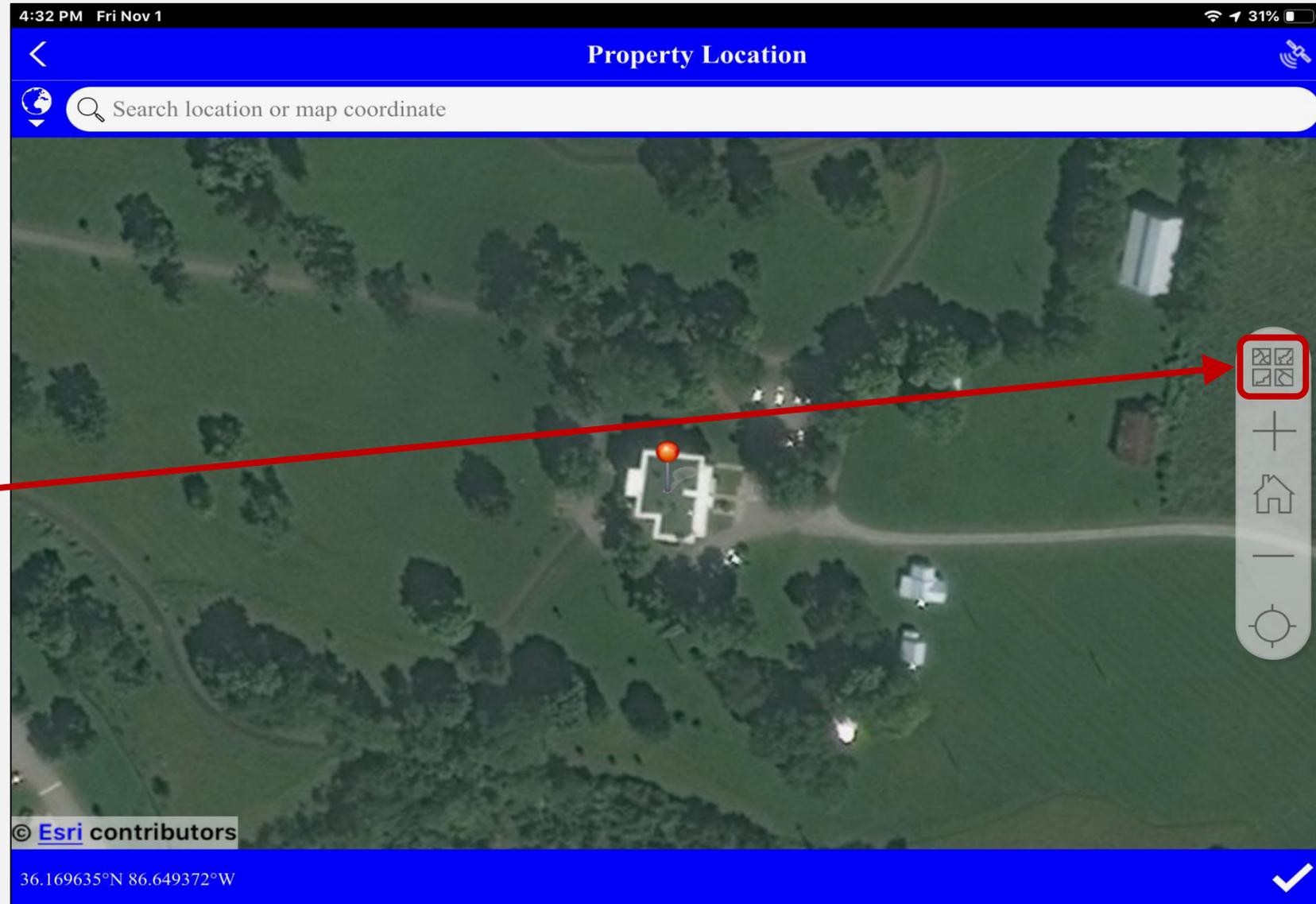
Touch or click the plus or minus signs to zoom in or out:

You can also pinch to zoom on a tablet or phone, or use the scroll-wheel on a PC or Mac.



Map Options, cont.

To change the map type/view, or access an offline basemap, click the 4-square menu at the top of the control panel:

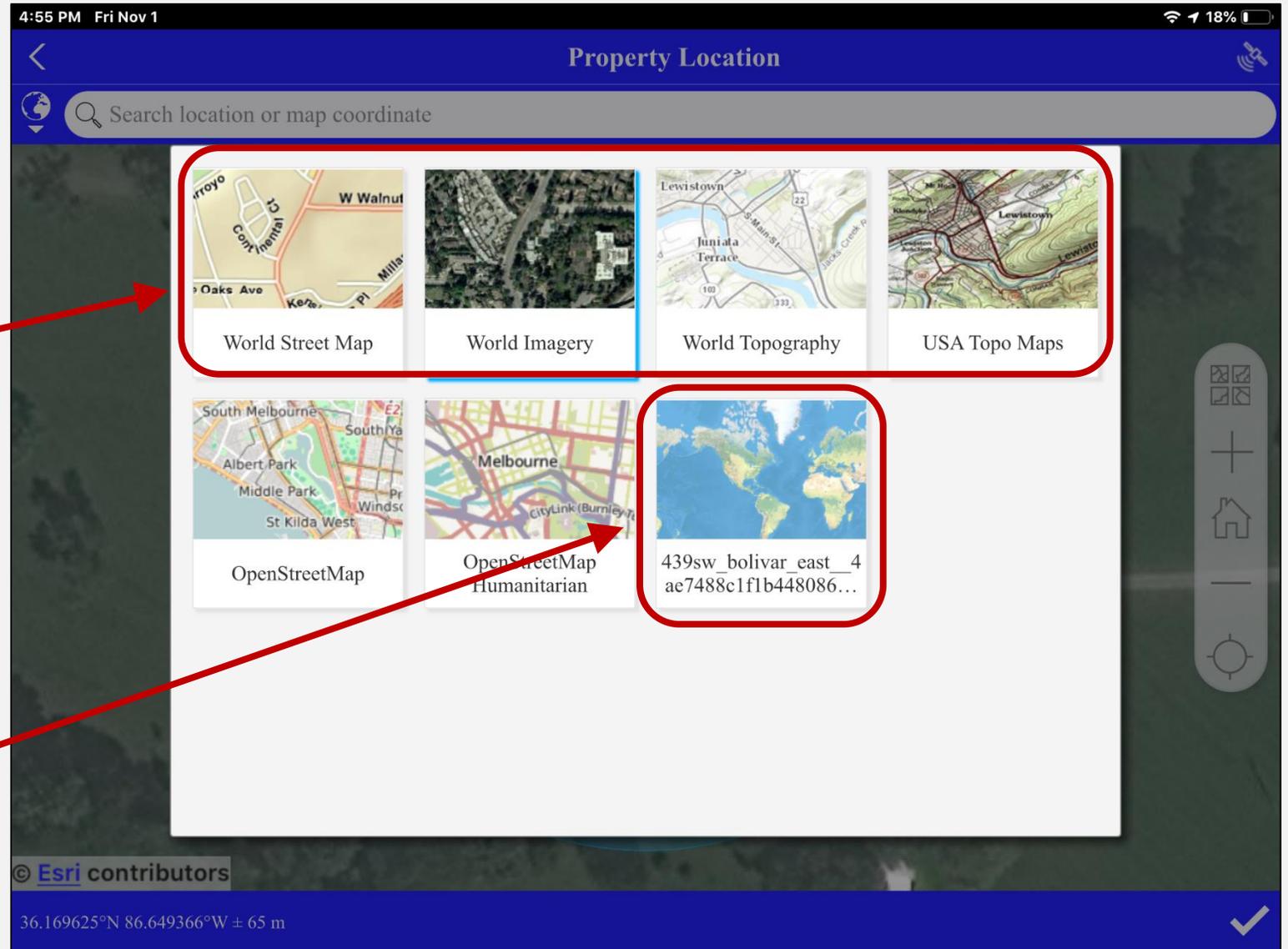


Map Options, cont.

Touch or click on the icon of the map type to change your view.

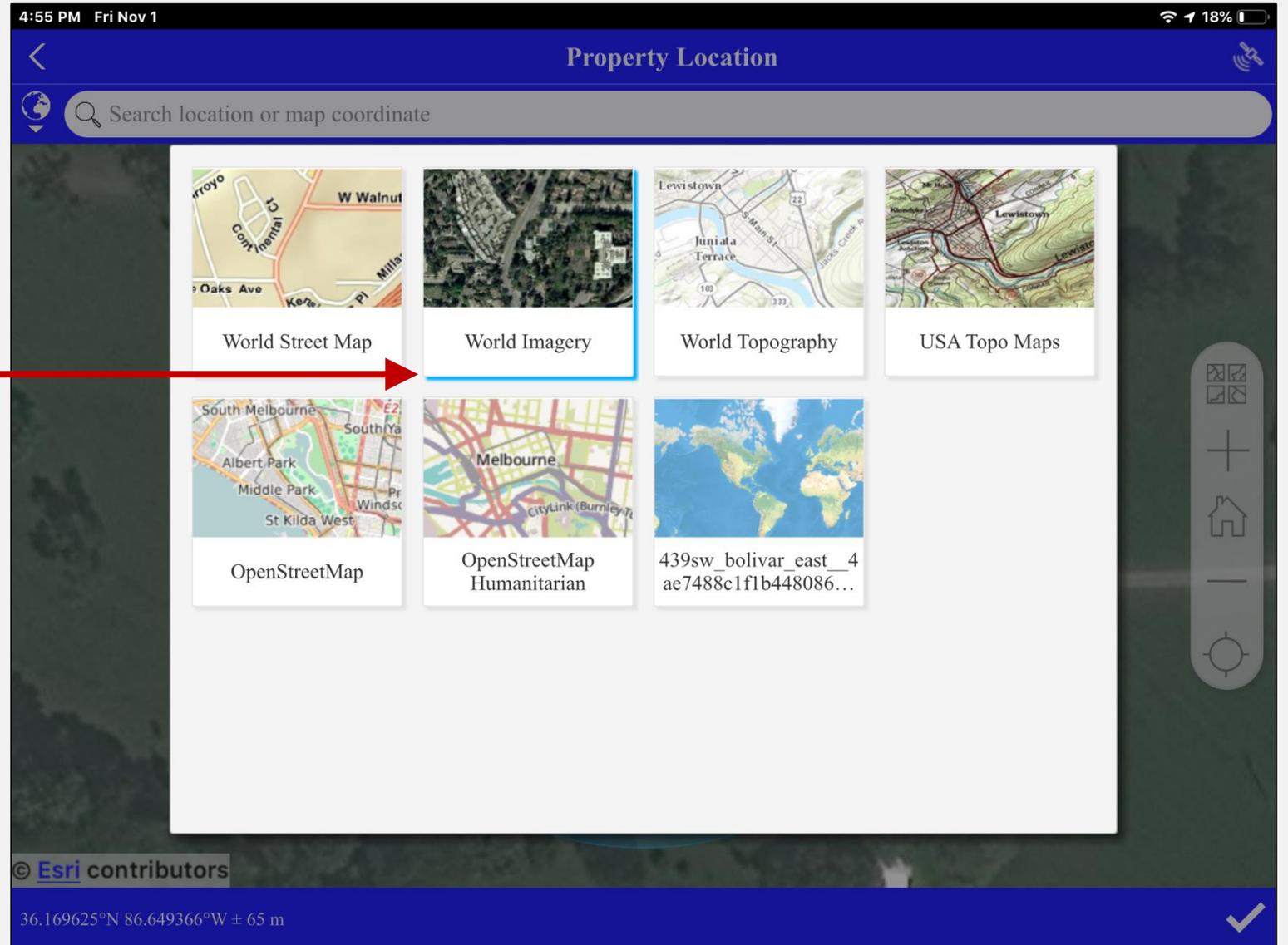
There are default types built into the app, and will always appear unless you are offline:

These are offline basemaps; they will always show, but will be the ONLY maps available if you are offline. Each of these only encompasses a single quadmap worth of imagery:



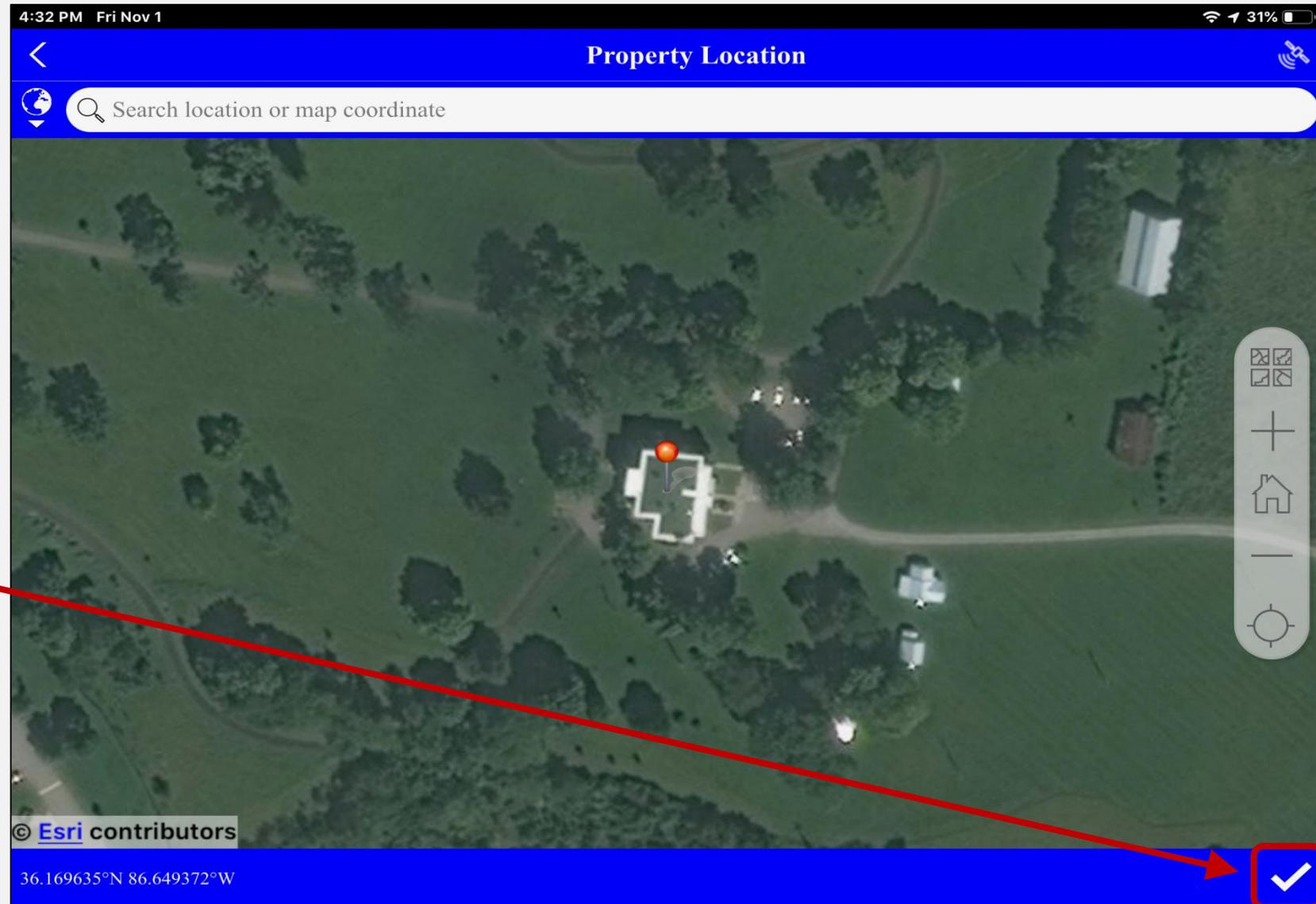
Map Options, cont.

The blue outline will indicate the currently selected map; by default, World Imagery is the chosen map:



Map Options, cont.

Once you have placed your location pin in the correct place, click or touch the checkmark to confirm the location and go back to the survey:



Geopoint Data

You may repeat the previous instructions ***at any time*** to adjust or correct the location data; if you are in an area with bad signal/reception, you can always go back and correct the location when the map is viewable again:

4:22 PM Fri Nov 1 36%

Tennessee Historical and Architectural Resources

Other Maps
Parcel and/or Tax Maps

Property Location

📍 36.170°N 86.649°W ± 65 m



Year of Construction
+/-5 years; No "circa" dates

— 2019 +

Builder

Property Status

✓

Concluding the Survey Form

When you are finished with the survey form—either completely, or if you must put it aside to finish later—then there are two ways to proceed:

The screenshot shows a mobile application interface for the Tennessee Historical And Architectural Resource. At the top, the status bar displays the time as 2:15 AM on Tuesday, March 12, and the battery level at 85%. The app's title bar is blue and contains a close button (an 'X' in a circle), the text 'Tennessee Historical And Architectural Resource', and a menu icon (three horizontal lines). Below the title bar is a list of menu items, each with a right-pointing triangle icon: 'Property Details', 'Property Status', 'Property Use Details', 'Photos', 'Architectural Details', and 'Architectural Comments'. At the bottom of the screen, there is a blue bar with a white checkmark icon. In the center of the screen, the text 'CN-0601 (Rev. 9-92)' and 'RDA 1212' is displayed.

Concluding the Survey Form [Method 1]

If you need to come back to this survey later, touch or click the “X” in the upper left corner:

The screenshot shows a mobile application interface for "Tennessee Historical And Architectural Resource". The top status bar displays "Tue Mar 12" and "85%". The app's title bar is blue and contains a white "X" icon in a circle on the left, a signal strength indicator, and a hamburger menu icon on the right. Below the title bar is a list of survey sections, each with a right-pointing triangle icon: "Property Details", "Property Status", "Property Use Details", "Photos", "Architectural Details", and "Architectural Comments". At the bottom of the form, the text "CN-0601 (Rev. 9-92)" and "RDA 1212" is visible. A blue bar at the very bottom contains a white checkmark icon. A red box highlights the "X" icon, and a red arrow points from the text on the left to it.

Exiting the Survey Form

If, for some reason, you need to abandon or delete this survey without submitting it first, touch or click here:

If you have accidentally arrived on this screen, simply touch or click here to continue filling in the survey:

The screenshot shows a mobile application interface for the Tennessee Historical and Architectural Resource. The page title is "Tennessee Historical and Architectural Resource" and the header includes the state seal and "Tennessee Historical Commission State Historic Preservation Office". The form contains several fields under "Property Details":

- Survey Date * (MM/DD/YYYY): Friday, May 29, 2014
- Surveyor Name *: Joe Q Public
- Surveyor Email *: Example@email.com
- Surveyor Affiliation *: The Survey Company
- Project ID *: Test Project 1
- County *

A "Confirm Close" dialog box is overlaid on the form, asking "What would you like to do?". It has three options, each with a red border:

- Close this survey and lose changes (with a trash icon)
- Continue this survey (with a back arrow icon)
- Save this survey in Drafts (with a folder icon)

Red arrows from the text on the left point to the "Continue this survey" and "Close this survey and lose changes" options in the dialog box. A blue checkmark icon is visible in the bottom right corner of the app interface.



Save In Drafts

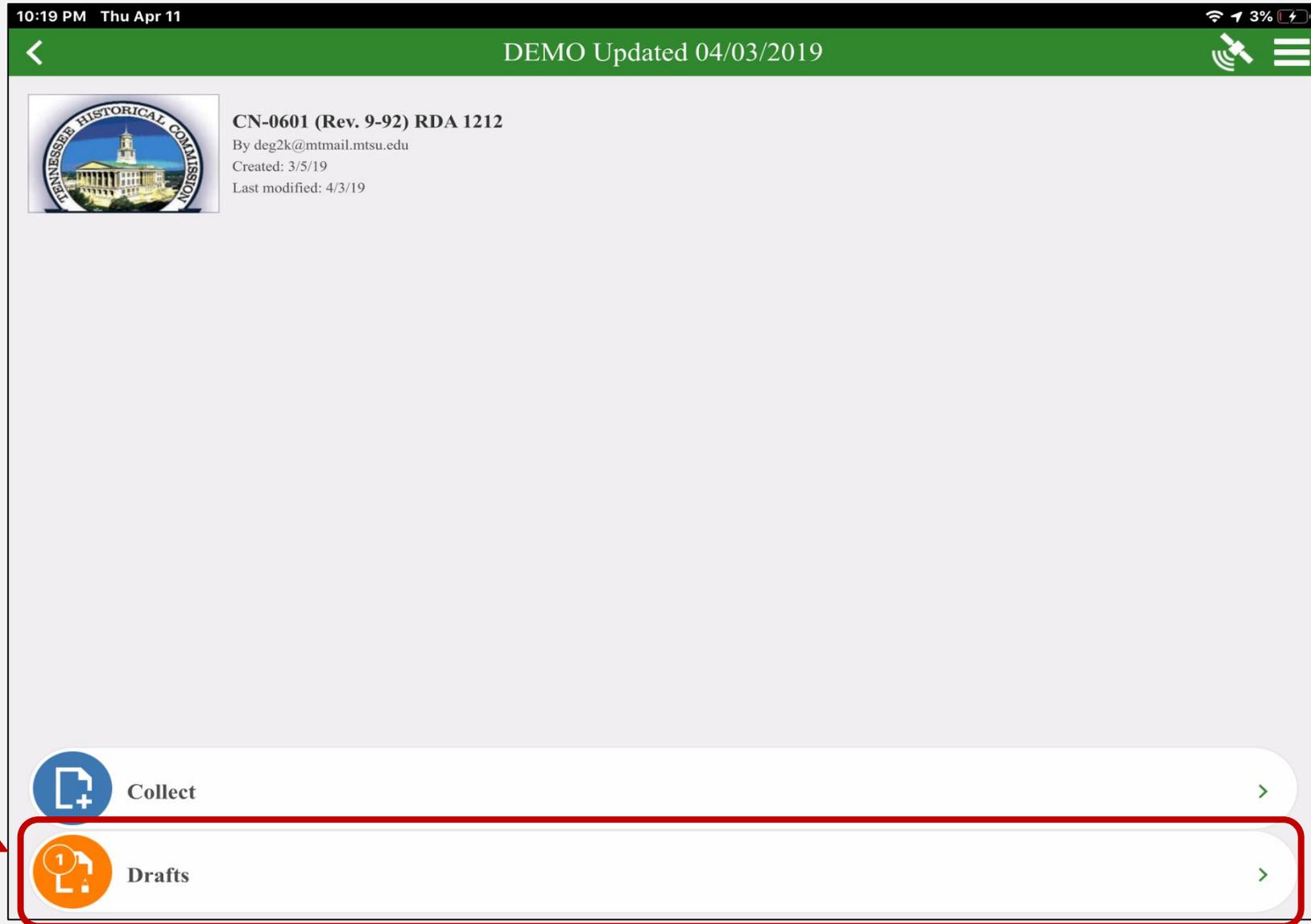
The final option on this screen allows you to save this survey form in “Drafts” and return to it later:

The screenshot shows a mobile application interface for the Tennessee Historical and Architectural Resource. The page title is "Tennessee Historical Commission State Historic Preservation Office". The main content area is titled "Property Details" and contains several form fields: "Survey Date" (Friday, May 29, 20...), "Surveyor Name" (Joe Q Public), "Surveyor Email" (Example@email.com), "Surveyor Affiliation" (The Survey Company), "Project ID" (Test Project 1), and "County". A modal dialog box titled "Confirm Close" is overlaid on the form, asking "What would you like to do?". The dialog has three options: "Close this survey and lose changes" (with a trash icon), "Continue this survey" (with a refresh icon), and "Save this survey in Drafts" (with a floppy disk icon). A red arrow points from the text on the left to the "Save this survey in Drafts" option. The dialog box is highlighted with a red border. The background is dimmed, and a blue checkmark icon is visible in the bottom right corner of the app.

Drafts

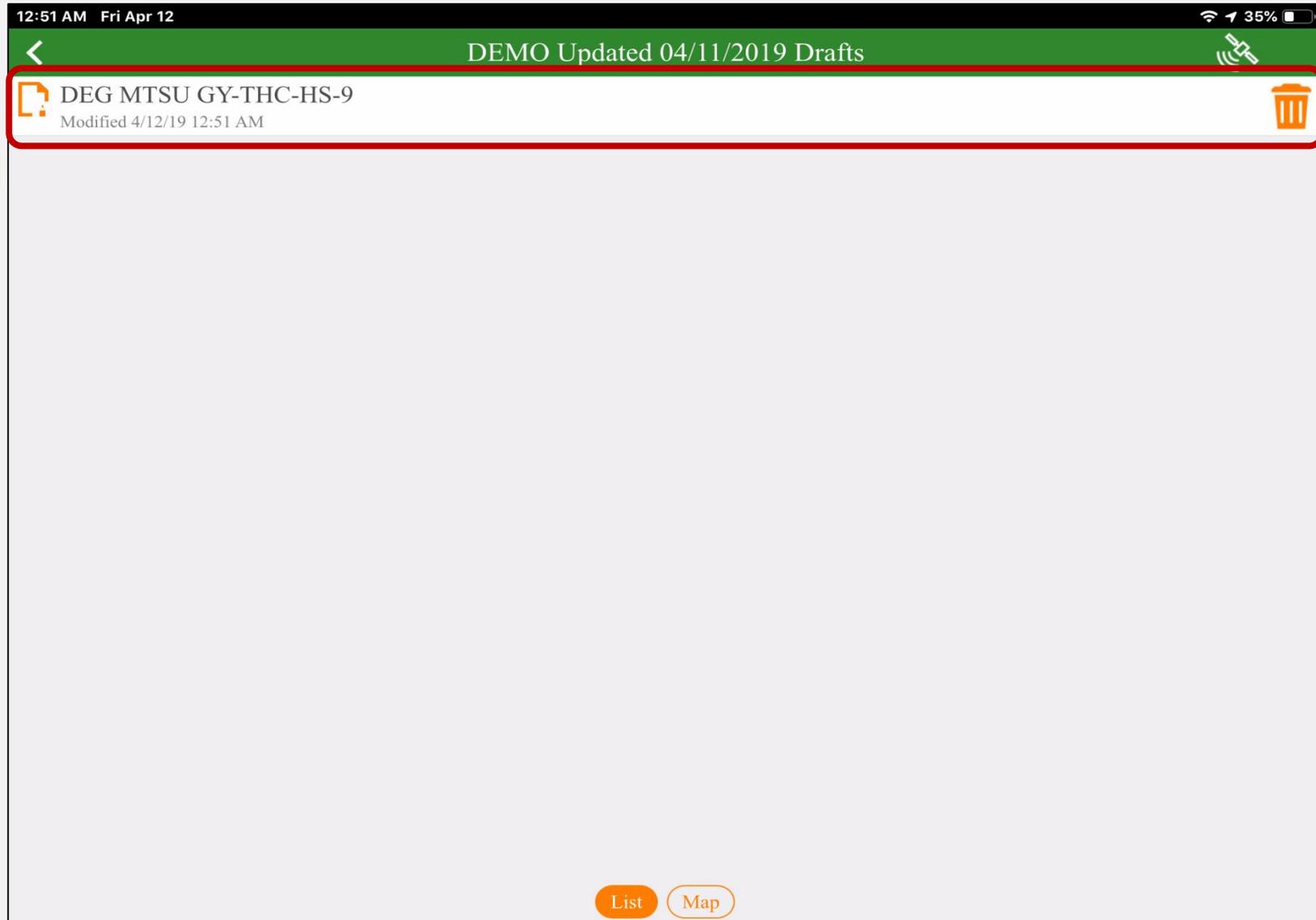
To resume a survey that has been saved to “Drafts”, go to the page where you begin all survey forms.

From here, select the Drafts button:



Drafts

Choose the specific survey you wish to resume (if there are multiple listed), click the label, and continue to input data:



Concluding the Survey [Method 2]

If you have fully completed* the survey click the checkmark in the bottom right corner to submit the survey:

*If there is a required field that was left blank, this is when it will take you back to the first unfilled required field.

2:15 AM Tue Mar 12

Tennessee Historical And Architectural Resource

- Property Details
- Property Status
- Property Use Details
- Photos
- Architectural Details
- Architectural Comments

CA 0601 (Rev. 9-92) RDA 1212

✓

Submitting the Survey, cont.

“Send Now” will submit the data to the server, and you will return to the initial survey screen:

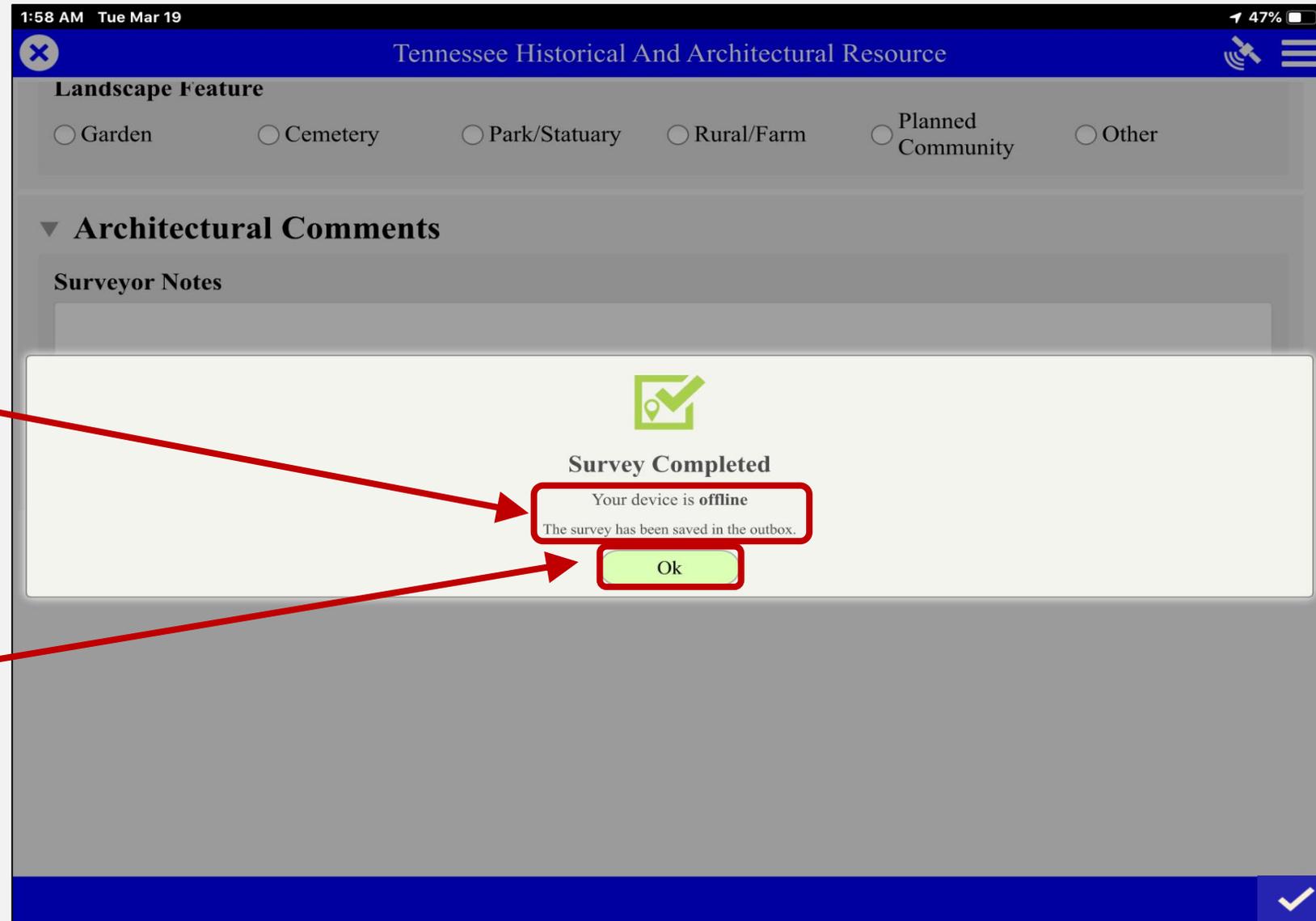
If you choose this option, it saves the survey to the Outbox:

The screenshot shows a mobile application interface for the Tennessee Historical and Architectural Resource. The form contains several fields: Field Number (HS-1 TEST ONLY), Historic Name, Common Name, Property Address (1234 Test Lane, NoWh), Street Number (1234), Street Name (Test Lane), City (NoWhere), Zip Code (12345), and Present Owner Name. A 'Survey Completed' dialog box is overlaid on the form, asking 'What would you like to do?' and offering three options: 'Send now', 'Continue this survey', and 'Save this survey in the Outbox'. Red arrows point from the text on the left to the 'Send now' and 'Save this survey in the Outbox' options. A blue checkmark icon is visible in the bottom right corner of the app screen.



Submitting the Survey, cont.

This is the message that appears when you try to submit a survey while offline; it does not give you any options, it just saves the survey to the Outbox:

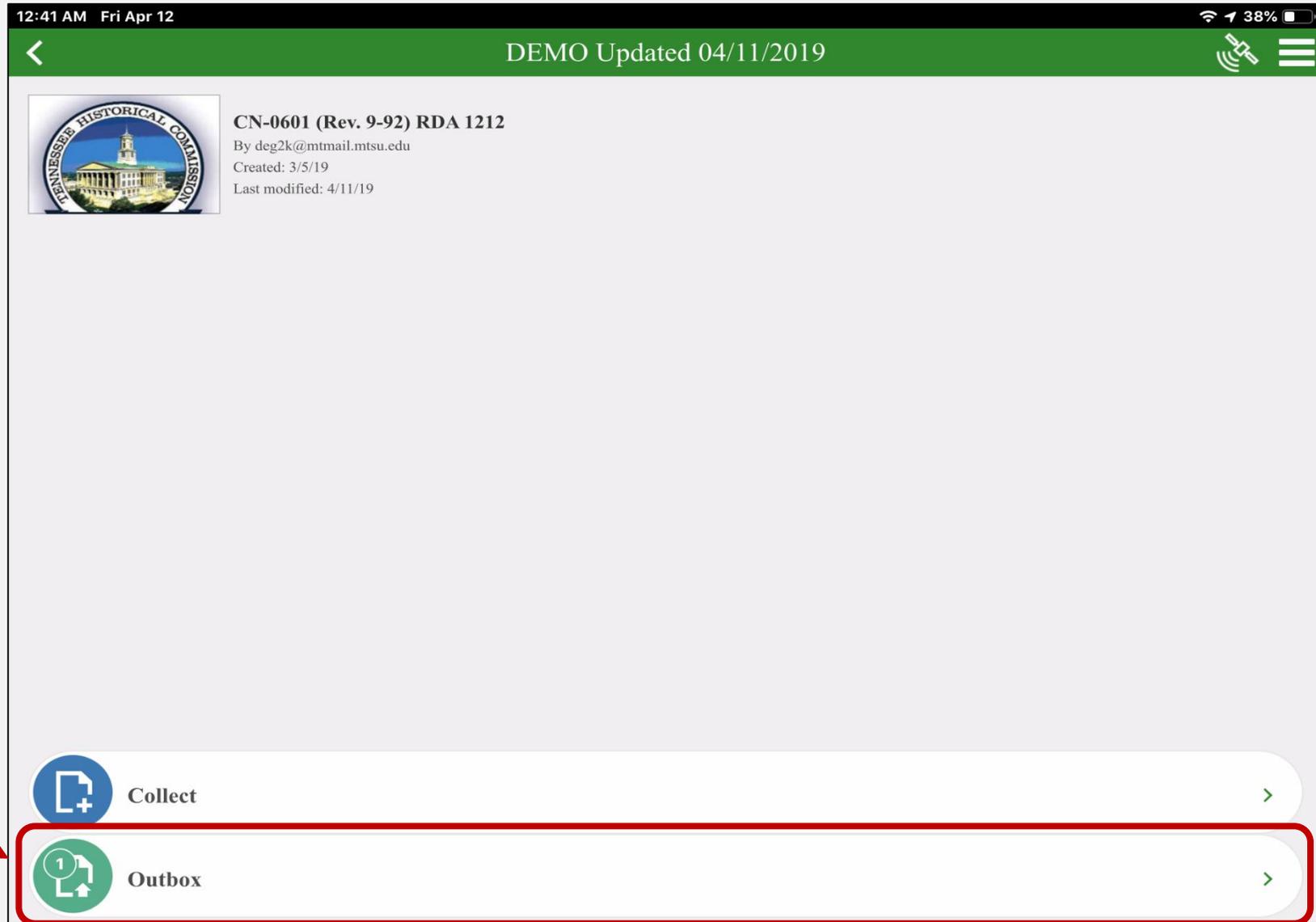


Touch or click "Ok" to return to the initial survey screen:

Outbox

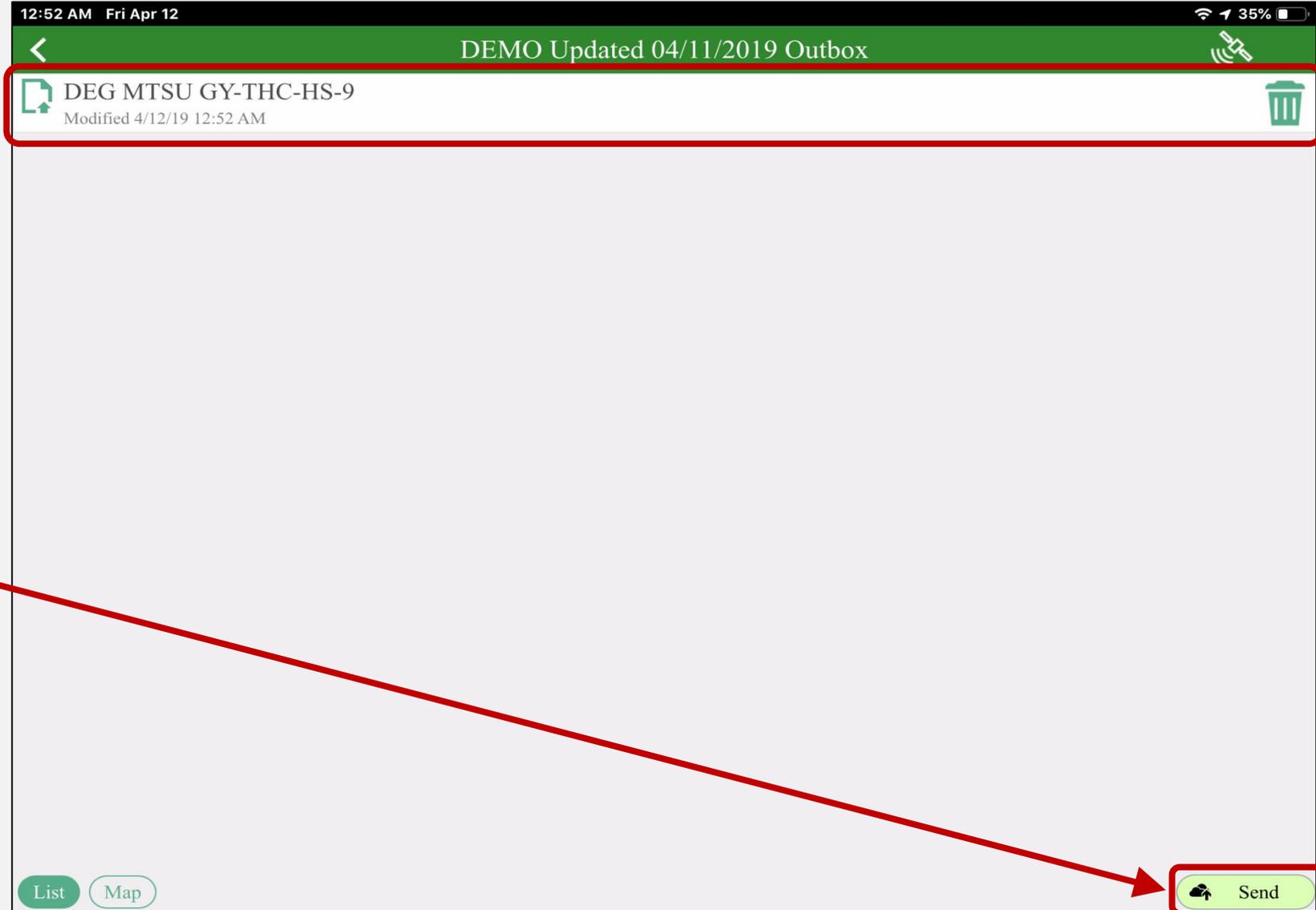
To resume a survey that has been saved to the “Outbox”, go to the page where you begin all survey forms.

From here, select the Outbox button:



Outbox

To modify the survey, click the label of the form you wish to change:



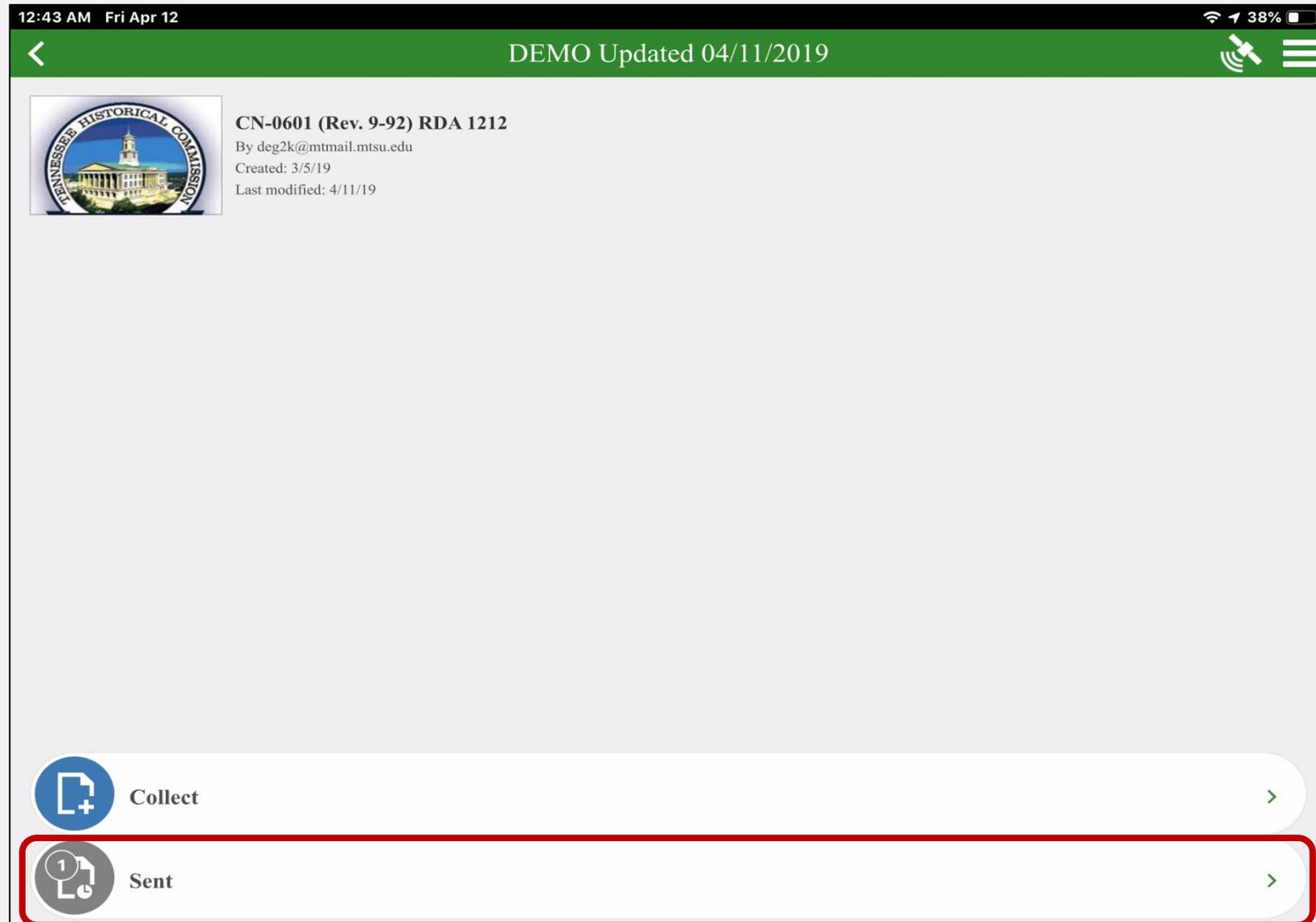
To submit the completed survey forms, simply touch or click Send:

Warning: This will submit **ALL** the survey forms currently saved in the Outbox...

Sent Surveys

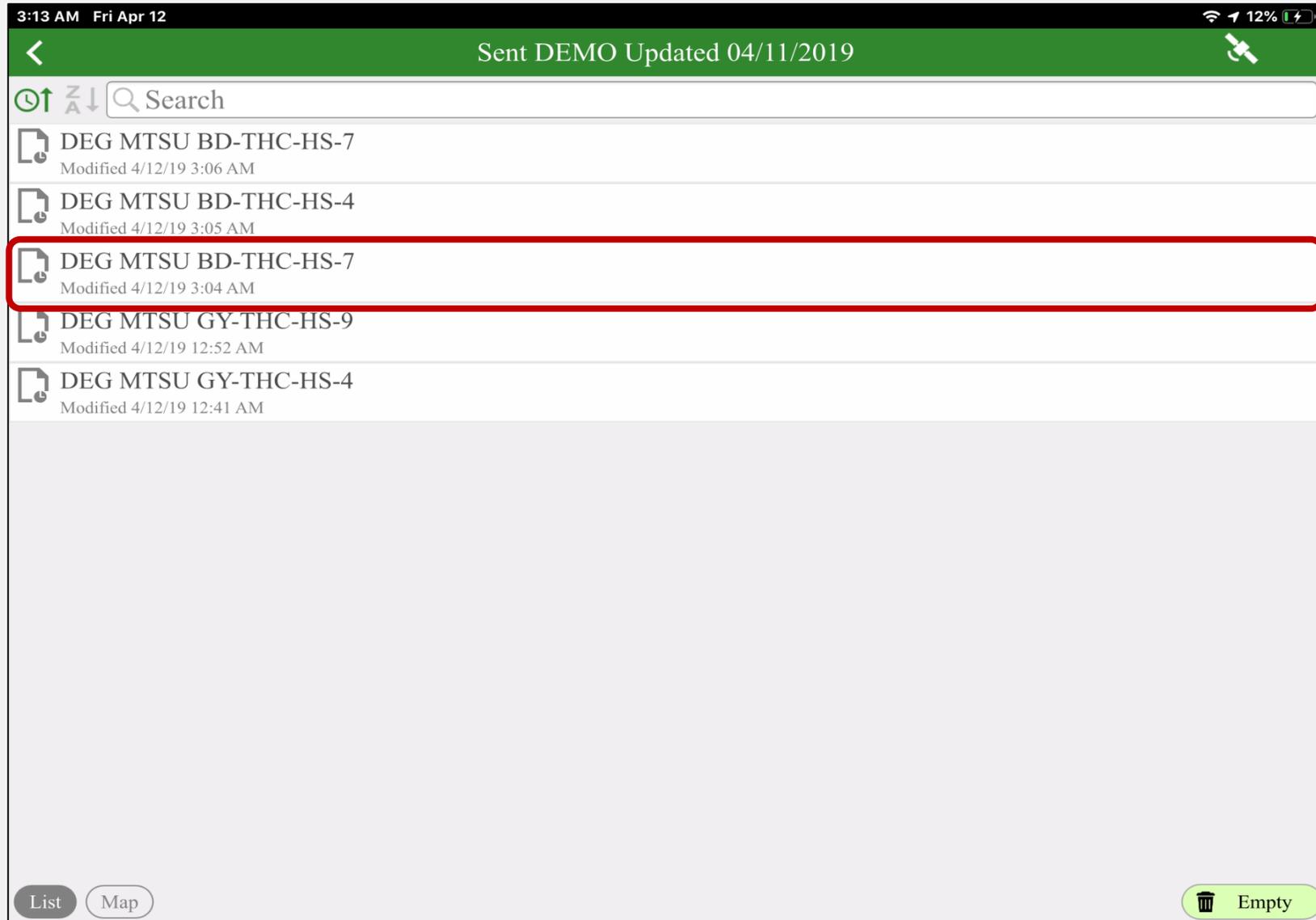
To edit and resend a survey that has already been “Sent”, go to the page where you begin all survey forms.

From here, select the Sent button:



Editing a Sent Survey Form

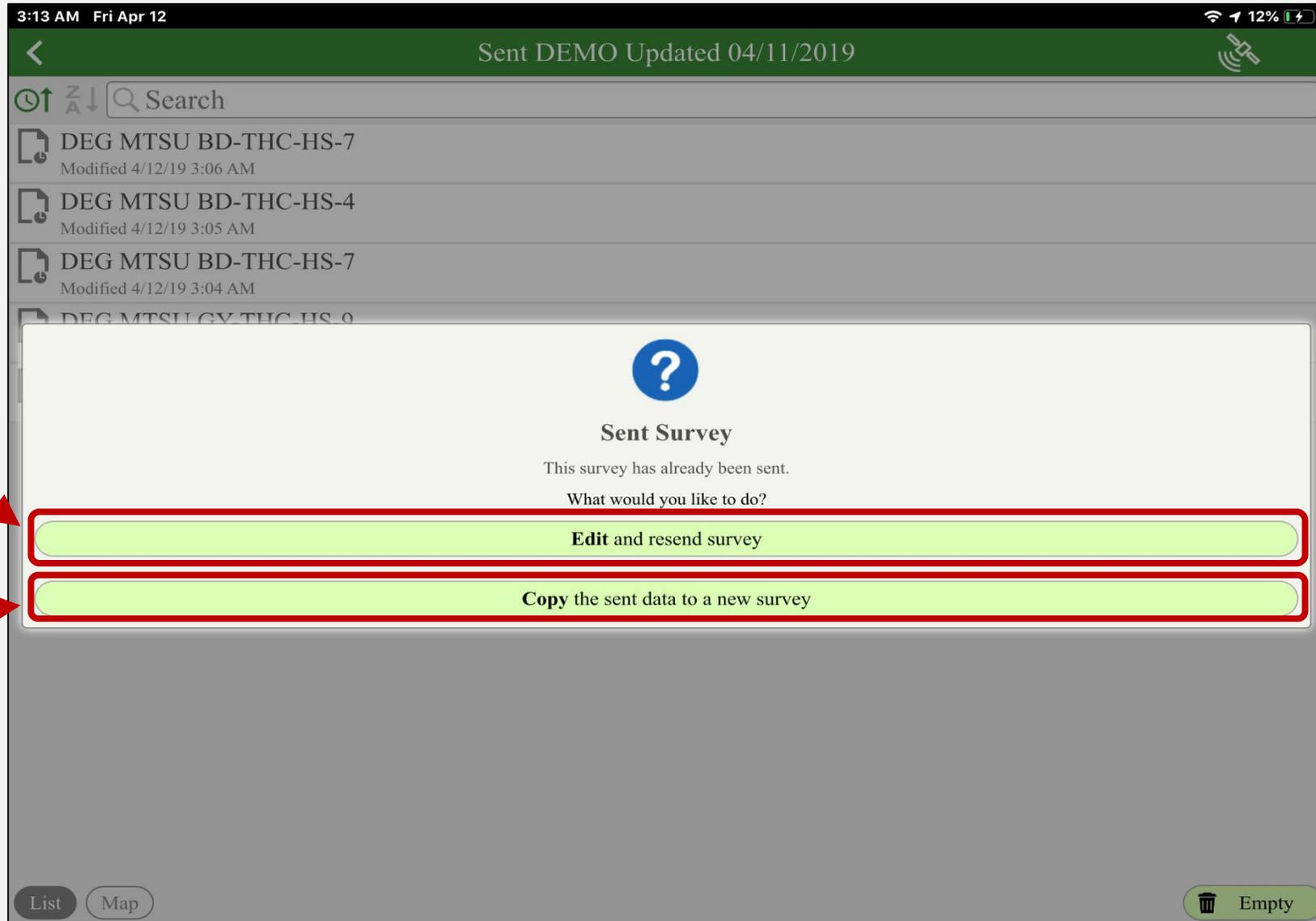
Touch or click the label of the survey form you need to edit:



Editing a Sent Survey Form

Once you have chosen the correct survey form to edit, touch or click the “Edit” button to re-open the survey form:

DO NOT choose the “Copy” option unless you are specifically instructed to do so!!

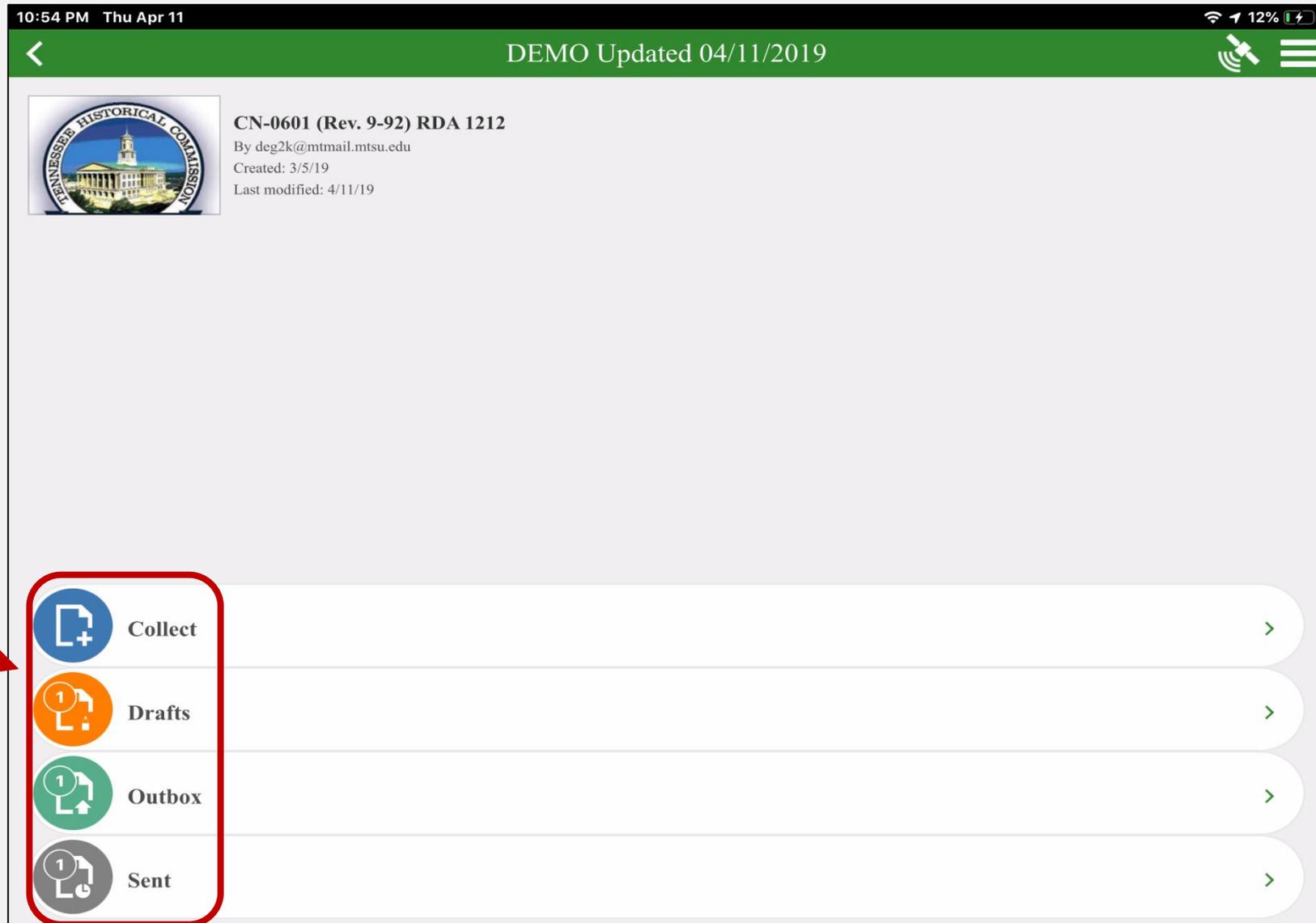


All Possible Options

This is the page where you begin all survey forms.

These are the only options you should ever see on this page:

If something additional appears, please check your survey form download page for updates!

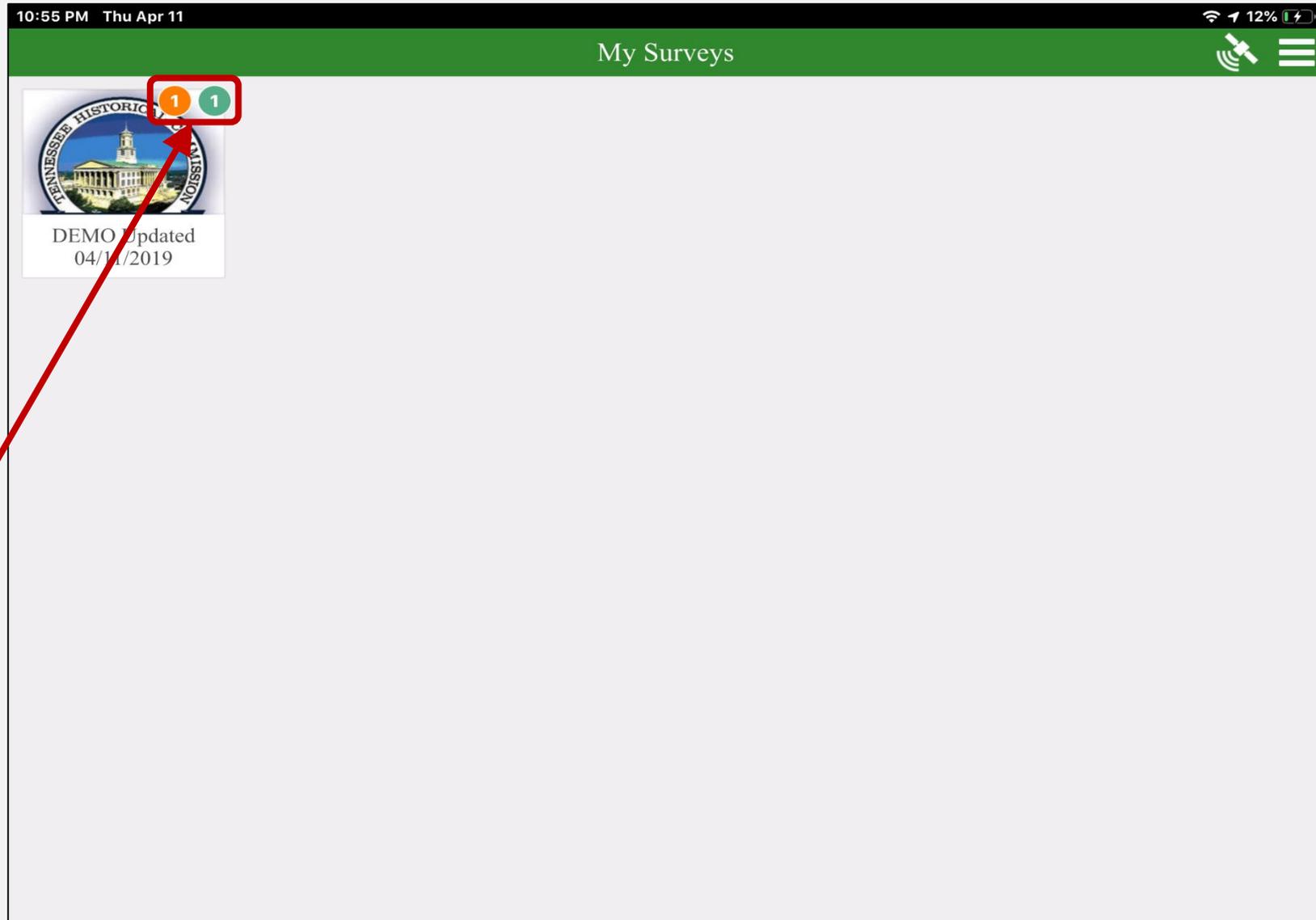


Notifications in “My Surveys”

As we discussed earlier, this page—“My Surveys”—is the first page you see when you open the Survey123 app.

From here, you can see notification icons, showing how many survey forms you have in Drafts (orange) and how many survey forms you have in the Outbox (green):

Sent forms do not display a notification icon.

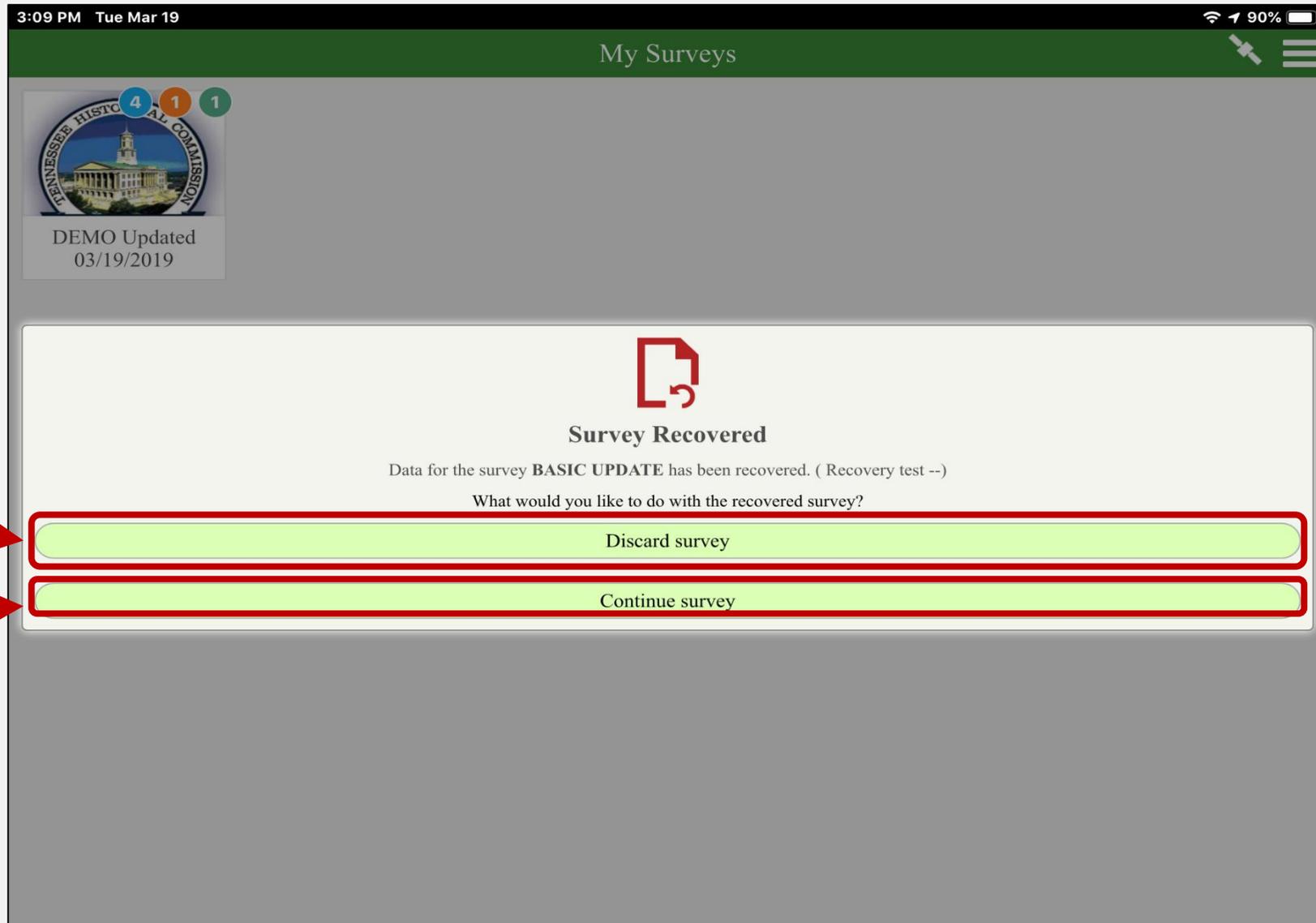


Recovered Surveys

A “Survey Recovered” message *should* appear if one of the following errors occur while in the middle of a survey: you accidentally close the app; if the app crashes; if your device unexpectedly powers off; or if any other situation occurs that causes the app to shut down in some way.

If you have already begun a new survey on another device, or if you think there are uncorrectable errors on the recovered survey, choose “Discard Survey”:

If neither of those applies, choose “Continue Survey”:



For additional questions or app support, please contact:



THC:
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THC.Survey@tn.gov

MTSU:
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mtsu.thc@mtsu.edu