



ArcGIS Survey123 Web Designer

V6 February 2023



Tutorial Overview

In this tutorial, you will learn how to create a survey using the ArcGIS Survey123 Web Designer, submit data, and create a Web map to share survey results.

Skills:

- Creating a survey in the Survey123 Web Designer.
- Submitting survey data.
- View the results of your survey
- Accessing and sharing survey data in ArcGIS Online
- Creating a Web map in ArcGIS Online.

Time Required:

30-45 minutes

Materials Required:

- An ArcGIS Online organization account. If you have not been given an account, speak with your teacher. Teachers - for information on joining an ArcGIS Online Organization, please visit www.esri.ca/agolaccess. For more information on ArcGIS Online, visit: www.arcgis.com.
- **Optional:** If you will be collecting data in the field offline you will have to download the Survey123 app - <https://bit.ly/2H19vNp>.
- An electronic version of this tutorial is available at <http://bit.ly/2qrziVq>.

Part A: Determine your Questions

Before you begin to build your survey, think carefully about the type of questions you would like to ask the individuals who will be filling it out. Here are a few examples:

- Are you building a collaborative map on where students' ancestors are from?
- Are you interested in how a community has been affected by climate change?
- Are you looking for information about the health and location of all the trees in a certain area?

Determining these questions in advance will assist with creating a well thought-out and useful survey in terms of the answers that it will provide you with.

Part B: Create and Configure a Survey

In this part of the tutorial, you will create a survey using the Survey123 Web Designer.

1. **Sign in** to your ArcGIS Online account from www.arcgis.com.
2. Click the  **Apps** button and choose **Survey123**. This will open a new tab in your browser.
3. Click **New Survey**.



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4. **Get started** with a **Blank survey** *Using the web designer*.
5. Your survey will open in the *Design* tab. Click on the pencil next to **Untitled survey_1** and give your survey a *Name*, *Tags*, and a *Summary*. You can change the thumbnail of your survey by clicking on *Thumbnail* and uploading a relevant image to make your survey easier to find. Click **OK**.

Note: A folder will be created with the name of your survey in your *Content* area of ArcGIS Online once the survey is published.

6. Change the Survey title to an appropriate title and add a survey description.



7. In the *Design* tab, this is where you will create your survey questions. Think about the questions you would like to ask and decide which question type is best suited to collect the most meaningful answers for that question.

Note: The *Map* question provides a map for the user to select a location that will display in ArcGIS Online. For instance, if you are collecting Tree Data, include a *Map* question so the user can tell you the location of each specific tree.

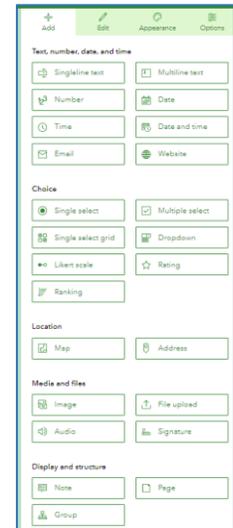
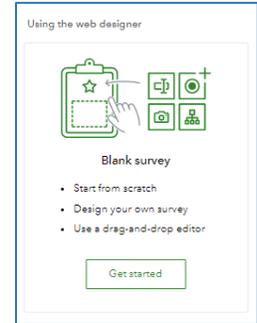
- a. Add your first question by single clicking on the question type.
- b. Once the question selection has been added to the middle of the screen, the **Edit** tab will be activated. You will see a list of customizable properties.

Below is a summary of common properties that you will customize for each question. Add your question properties.

Label: Type in the question you want answered here. *Hint:* Provide a hint to tell the user how to answer this question.

Choices: Depending on the question type, you will provide a list of choices for the user to choose from.

Validation: Increase data accuracy by limiting the way a question is answered. For instance, setting a min. and max. value and making a question required. The user will not be allowed to submit the survey without answering a required question.

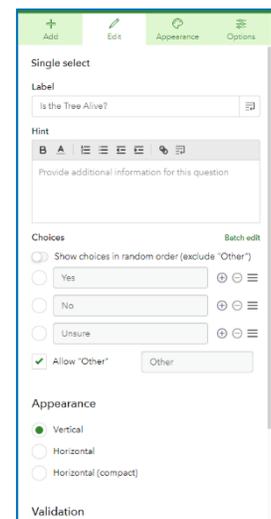


Note: The *Edit* tab will look slightly different for each question type.

- c. To add more questions, click on the **Add** button  and select a question type. Follow Steps 7a-b to activate the **Edit** tab and change the question properties.
8. You have the option to *set visibility rules* to make the visibility of some questions conditional on the answer to a prior question. Visibility rules can be added to **Single Choice** or **Dropdown** type questions.

- a. For instance, if you are collecting Tree Data you may have the following two questions:

1. *Is the tree Alive or Dead?*
2. *Why is the tree Dead?*



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You may want Question 2 to appear only if the user selected *Dead* as the answer to Question 1. To do this, click **Set Rule**  on Question 1. A popup will appear that allows you to set the visibility rules for other questions. Under *If* you will select the answer (in this case, *Dead*). Under *Show*, you will select the question that will appear when the answer specified under *If* is selected (in this case, *Why is the tree dead?*).

- b. Repeat this process with other questions you wish set visibility rules for.
9. Once you are done configuring your survey, click **Save**.
10. Click **Preview**  at the bottom of the page. Here you can preview how your survey will look on various devices. Close the preview, make any necessary changes to your survey, and click **Save**.
11. When you are ready to publish your survey, click **Publish**  at the bottom of the page.



Part C: Share your Survey & Collect Data

In this part of the tutorial, you will share your survey so that you and others can submit data to your survey.

1. **Before you begin data collection, you will specify who can fill out your survey.**

- a. Click on the **Collaborate** tab  to view the options you have to share your survey.
- b. **Share Survey** – allows you to choose who can submit data to the survey.
Note: Choosing *Everyone (Public)*, allows anonymous users to submit to the survey, even those without an ArcGIS Online account.
- c. Once you've made your selection, click **Save** . You and the selected users will now be able to submit your survey.

2. **Share the survey** via the *Copy the URL* or the QR code found near the bottom of the **Collaborate** tab.

- a. Under the **Collaborate** tab, choose to **open the survey in browser directly**.
Note: If you are going to do field collection offline, you will have to use the Survey123 field app. You will select the option “Open the survey in the Survey123 field app directly.”



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3. Under the same tab, click on **Share Results** to choose who can view the survey results. You have different options to customize how you want your results shared.

4. **To collect data in class:**

- Open the *Survey Link* in a Web browser.
- Fill out the survey. When you are done answering all questions, click **Submit**.

Note: If you shared your survey with *Everyone (Public)* in Step 1a, anyone who visits the *Survey Link* can submit to your survey without logging in. If you selected *Members of my organization* or *Following Groups*, users will be prompted to log in using their ArcGIS Online account to view and submit to your survey.

Who can view results of this survey?

- Everyone (public)
- Members of my organization (Education and Research)
- Members of the following groups:
 - How to GIS Gallery Details
 - 2019 K-12 Competition Details
 - A Kids Guide to Canada Details
 - Admin Details
 - Admin tools Details

What data can viewers see?

- All records in this survey
- Only their own submitted records

What can viewers do?

- View and export data
- Only view data

5. **To collect data in the field offline:**

- Download the Survey123 field app - <https://bit.ly/2H19vNp>. Sign in with your ArcGIS Online credentials and then search for the survey.

Part D: View Survey Results

In this part of the tutorial, you will view your survey results in Survey123.

1. To track the status of your survey and view the survey results, **Sign In** with your ArcGIS Online account, click the  **Apps** button, and choose **Survey123**.

- Under the *Surveys I own* page, find your survey and click the  which brings you to the **Analyze** tab.
- Here, you can see the results of your survey by viewing the individual answers to each question. To see the data update in real-time, simply refresh the page periodically.
- Depending on the question type, you will be able to change the view of the data by selecting the different options in the top right-hand corner of each question box. Each question type will have different view options (Column, Bar, Pie, Map, etc).

 button



2. To download your data or to see your data on a map, click the **Data** tab

- Here you can see your data represented on a map as well as in a table. To download your data, in the bottom right-hand corner of the page select the format you require (CSV, Shapefile, or File Geodatabase), and click **Download**.





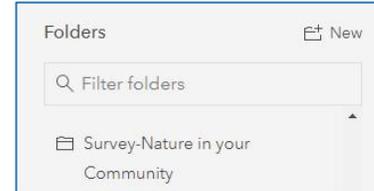
Note: If you included a *Map* question, the points on the map correspond to the location the respondents chose. If you did not include a *Map* question, the points on the map correspond to the location of the *device* that the respondent used to submit the survey.



Part E: Accessing your Survey Data in ArcGIS Online

In this part of the tutorial, you will find how out to access the survey data (feature layer) from the **Content** section and share it with others.

1. Sign into **ArcGIS Online**.
2. Go to the **Content** section.
 1. Find your survey folder (Survey -name of your survey) and then click on the name of the survey to open the folder.
 2. You will see three items in your folder – these are automatically created, just like the folder was.

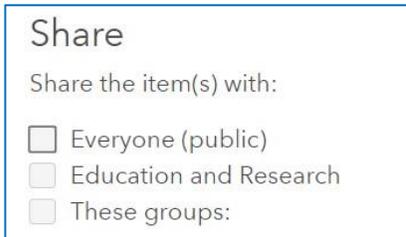


Sharing your survey data (feature layer) allows others to search and add it to their own maps when they are in the Map Viewer.

3. Select the **“Feature Layer (hosted)”** layer and click on **Share > Access** to view your sharing options.



4. Select the sharing option of your choice and then click **OK**.



Part F: Create a Web Map with your Survey Data in ArcGIS Online

In this part of the tutorial, you will learn how to access the survey data (feature layer) and create a Web map in ArcGIS Online.

1. Go back to the survey folder you just accessed in the *Content* section.
2. Click on the **“Feature Layer (hosted)”** layer. This will take you to the *Description* page of this layer.
3. Click **Open in Map Viewer**. You should see the survey data on your map now.



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4. Hover over the layer in the *Content* section and select the **Change Style** icon  to change the **symbolology** of the layer.
5. You can also click on  **Basemap** to change the **basemap**. There are 10 options available.
6. Save your map by clicking **Save** .
7. Click **Share**  to share your map containing the results of your survey with the public, members of your organization or with a group.

Next Steps

Discover how you can create a group to share your maps and web apps: <https://bit.ly/2SqupuFW>.

Want to learn how to “Change Style” to create a heat map with the survey data you collected? Check out this ArcGIS Online help page: <https://bit.ly/3Ze5Mjw>

Want to learn more about sharing the results of your survey? Check out the “**Creating ArcGIS Dashboards**” tutorial to learn more: <https://bit.ly/3eidOSn>. Search for more K-12 tutorials and lessons at k12.esri.ca/resourcefinder.

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