Guide to Using
Survey123

This reference sheet provides an overview of using ArcGIS Survey123 to collect Pollinator Scorecard data in the field and provides step-by-step instructions for users to follow.

What is the Database?

The Rights-of-Way as Habitat Geospatial Database (the Database) is a central repository for tracking existing, restored, and potential pollinator habitat. It facilitates conservation partnerships within and across energy and transportation sectors. The Database can also help your organization communicate the conservation value of your land to the public, state and federal resource agencies, and other key stakeholders.
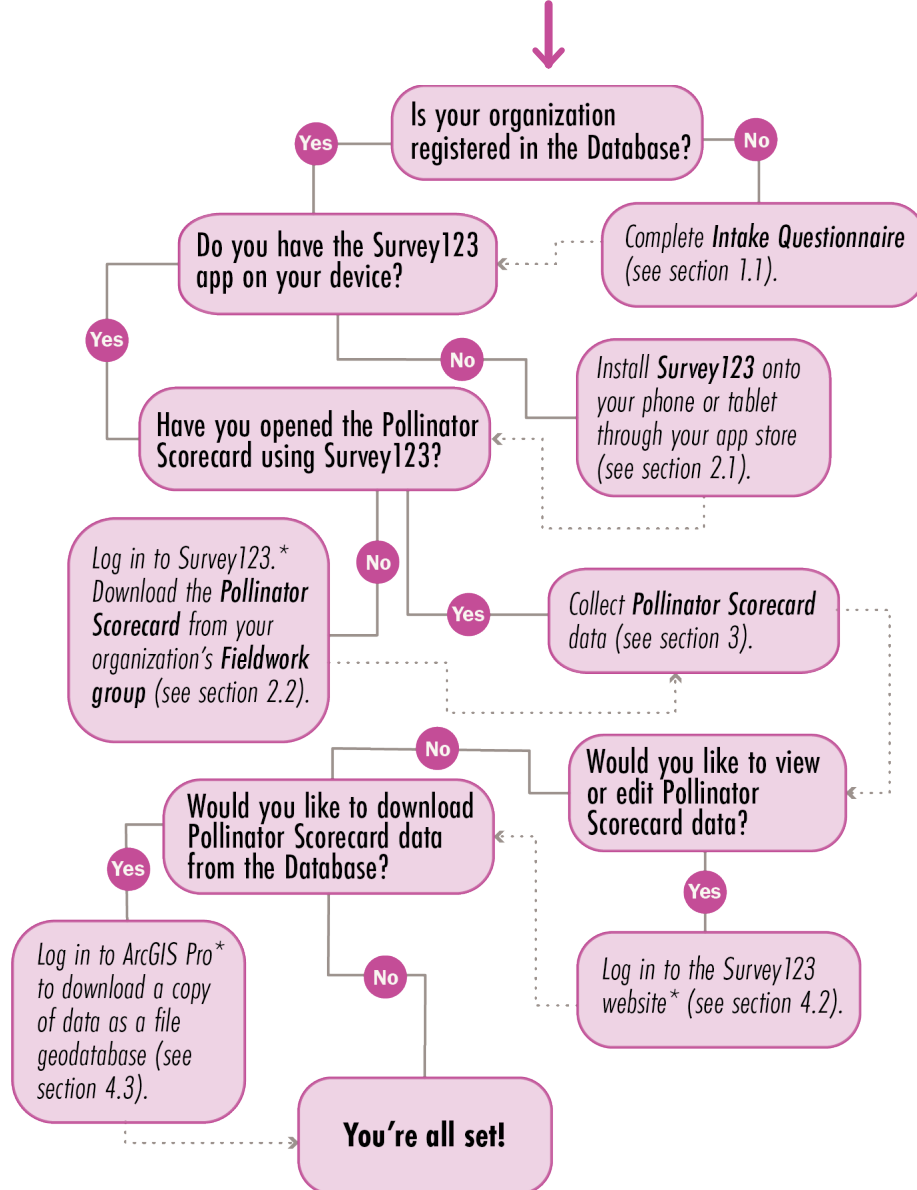
For more information, including access to additional guidance documents, visit:

**www.rightofway.erc.uic.edu/
geospatial-database/**

Why use Survey123?

→ To collect, view, and modify Pollinator Scorecard data with a digital device in the field

→ To facilitate tracking by seamlessly syncing habitat data and photos with the Database

→ To streamline data collection and reporting for the Monarch CCAA

→ To easily locate and navigate to previously monitored locations

Where to **start**?

Is your organization registered in the Database?

- Yes
- No

Complete *Intake Questionnaire* (see section 1.1).

Do you have the Survey123 app on your device?

- Yes
- No

Install *Survey123* onto your phone or tablet through your app store (see section 2.1).

Have you opened the Pollinator Scorecard using Survey123?

- No
- Yes

Log in to Survey123.* Download the Pollinator Scorecard from your organization's Fieldwork group (see section 2.2).

Collect *Pollinator Scorecard* data (see section 3).

Would you like to view or edit Pollinator Scorecard data?

- No
- Yes

Would you like to download Pollinator Scorecard data from the Database?

- Yes
- No

Log in to ArcGIS Pro* to download a copy of data as a file geodatabase (see section 4.3).

Log in to the Survey123 website* (see section 4.2).

You're all set!

*Log in using your ArcGIS Online account connected to the Database, which you receive(d) via email after completing the Intake Questionnaire. ArcGIS Pro licensing is available for all accounts associated with the Database.

Rights-of-Way as Habitat Geospatial Database

1 Account Set-up

1.1 Complete the Intake Questionnaire to set up your initial data access to the Database. Here, you will identify future Database users by user type, and data visibility preferences.

See Database User Guidance ("Getting Started")

1.2 Once approved, identified users will receive an email with ArcGIS Online account credentials.***** Your ArcGIS Online account gives you access to the Database, including your organization's Private Dashboard, Pollinator Scorecard data, and other services.

Intake Questionnaire
Visit the ROW as Habitat Geospatial Database website: http://rightofway. erc.uic.edu/wp-content/uploads/ Database-User-Guidance.pdf

ArcGIS Online Login
Visit www.arcgis.com to access your account

* If using a previously created ArcGIS Online account, an email will not be sent. Instead, the user will need to log into their account and accept the invitation.
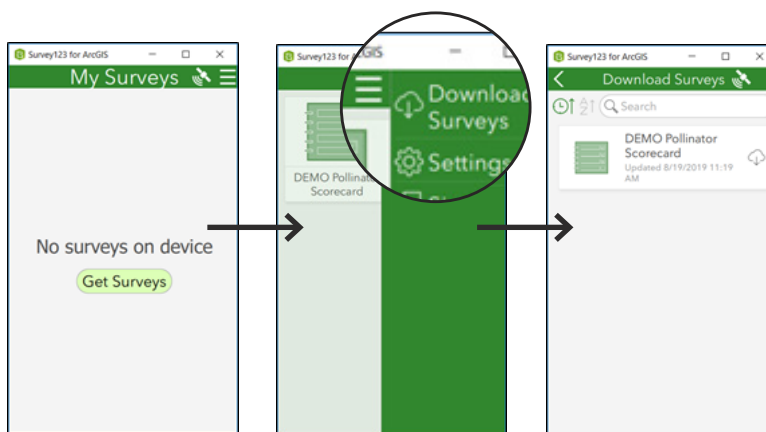
2 Survey 123 Set-up

2.1 On your phone or tablet, download and install the free ArcGIS Survey 123 field app (☑). After opening, select the 3 lines (or your initials) in the top right corner and sign in with your ArcGIS Online account credentials.

2.2 Once logged in, select "Download Surveys" and click on the cloud symbol (⬆) to download your organization's Pollinator Scorecard survey.

Tip
If you get an alert that an update has been made to the survey, select Updates Available and click on the arrows symbol ⬇ next to the Scorecard to update the survey.
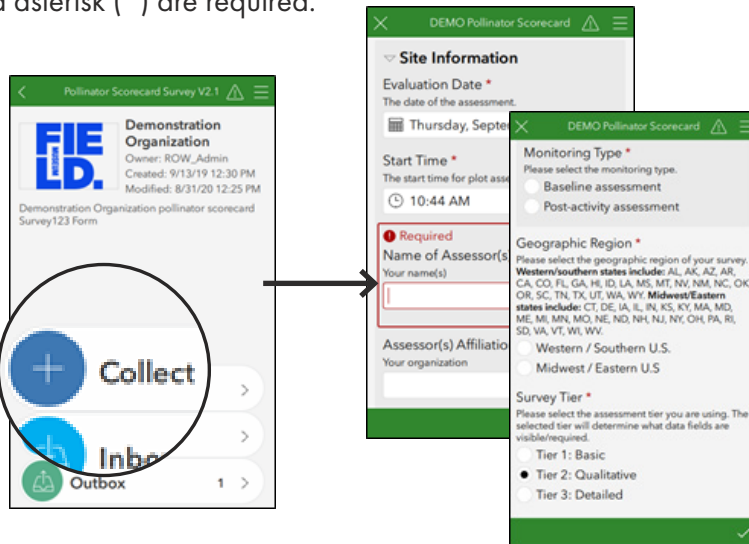
3.1 Establish your assessment area and select your plot location to conduct the Pollinator Scorecard assessment. Plot set-up instructions can be found in the Pollinator Scorecard User's Guide.*

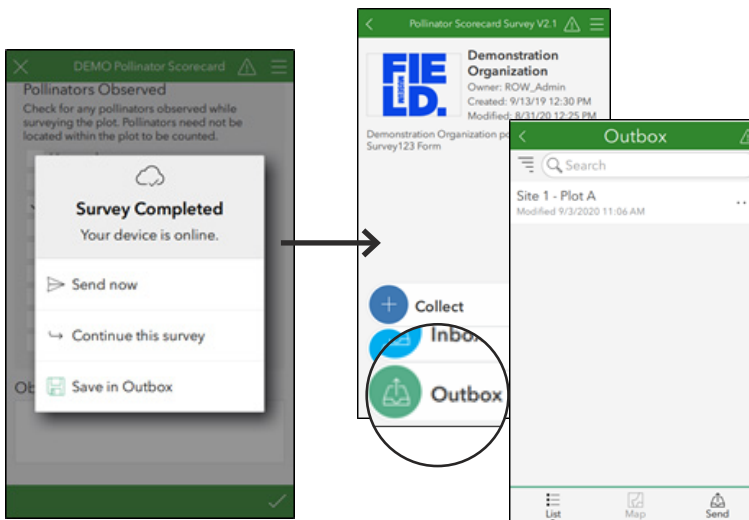*See Pollinator Scorecard User's Guide*

3.2 In Survey 123, click "Collect" to start a new assessment. Fields with a red asterisk (*) are required.

3.3 Fill in the Pollinator Scorecard assessment fields: Site or Management Area information, plot information, habitat attributes, and land management information (if applicable). You will be prompted with fields that correspond to the Pollinator Scorecard tier selected.

See Pollinator Scorecard User's Guide

3.4 Submit the completed assessment. You can Send Now or Save in Outbox (e.g. if there is no internet access). If you choose Save to Outbox, click "Outbox" to edit and/or send completed assessments.

Pollinator Scorecard User's Guide

Visit the Pollinator Habitat Scorecard website: http://rightofway.erc.uic.edu/pollinator-habitat-scorecard/

*Note: A plot is 1500 sq. ft.

ArcGIS Field Maps App

Sites and Management Area details and geogrpahic boundaries can be viewed by phone or tablet using the ArcGIS Field Maps app. **Note:** ArcGIS Field Maps was launched in October 2020 and replaces the functionality of ArcGIS Collector, ArcGIS Explorer, and ArcGIS Tracker on the iOS and Android mobile platforms.

See Database User Guidance ("Field Data Collection")

Key Functionality

• Plot GPS coordinates can be captured either for the current location or by selecting a location on a map. Survey 123 will capture your current location if you are offline.

• There is the option to upload one or more photos of the plot. You can use the camera icon to capture a new image (if available on your device) or the folder icon to load an image found on the device. Once an image is loaded, you can delete it by clicking on the trashcan symbol or click on the 3 dots to view, rename, or rotate the image. It is recommended that you rename each photo to provide context for the image.
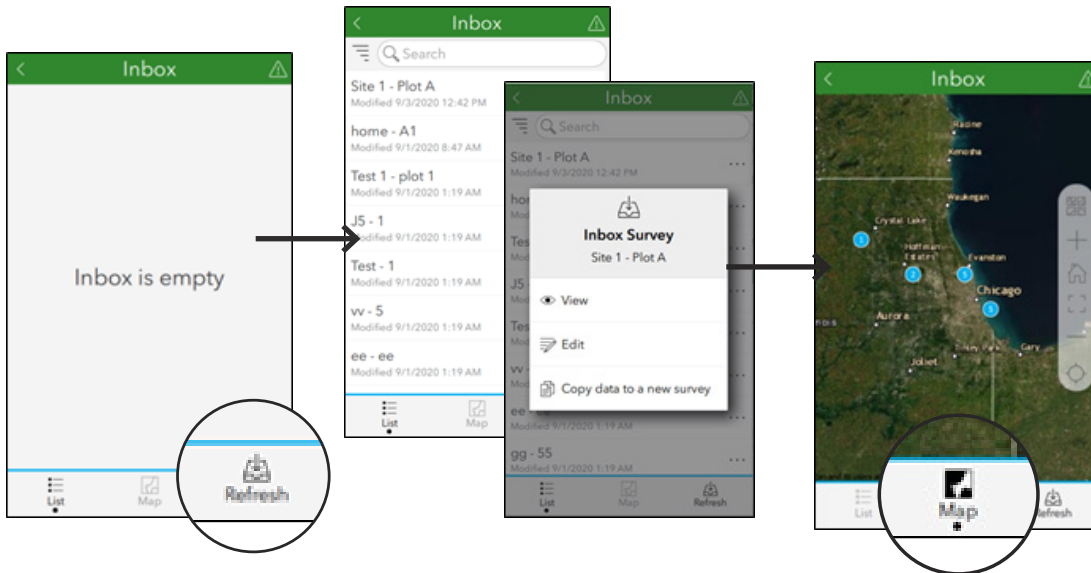
Tip

Tier 3 species-level data is not available through Survey 123 at this time. Species data should be collected on paper form as supporting documentation and may be uploaded in Survey 123 as an image or PDF file.

4 Accessing Data

4.1 To view or edit your organization's submitted Pollinator Scorecard records in Survey 123, open the Inbox and click the "Refresh" button. When you click on a record, you will have the option to View, Edit, or Copy the data into a new assessment.

Tip
To narrow the records to a specific area, click on the Map button in the bottom middle, zoom into the desired extent, and click the Refresh button.

4.2 To view or edit Pollinator Scorecard data, visit the Survey 123 website and login with your ArcGIS Online account credentials. Navigate to Organizations and select the Data icon (🗐) in your Management Group. Users may also access data using ArcGIS Pro.*****

See Database User Guidance "Data Management"

Survey 123
Visit the ArcGIS Survey 123 website:
survey 123.arcgis.com

*By default, all accounts associated with the Database have ArcGIS Pro licensing included. Login with your ArcGIS Online account credentials.

4.3 To download a copy of your data as a file geodatabase, open ArcGIS Pro* and do the following:
- Click on Settings
- Under Open and Portal, navigate to your organization's Management Group
- Open the ROW Tools V2 project
- Select View Tab
- Select Tasks
- Open the Importing & Exporting Data folder
- Run the Database Import and Backup Tools
- Choose your organization ID (should only be one option)
- Choose Output Dataset
- Run tool

See Database User Guidance "Data Management"

If you have questions on the Database or Survey 123, send an email to rowhwg@uic.edu or post your question on the online Disussion Board under Working Group Access at http://rightofway.erc.uic.edu/