

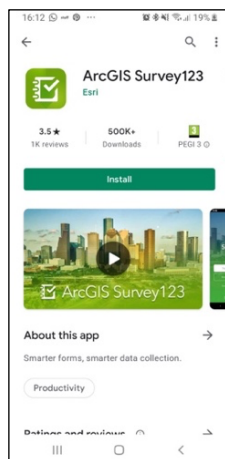
# SURVEY123 APP INSTALL GUIDE

v1.1

*This guide outlines how to install the Survey123 app on your phone or tablet in order to be able to submit survey information. The app cannot be used to generate reports. This is done via a desktop computer and is discussed in another guide.*

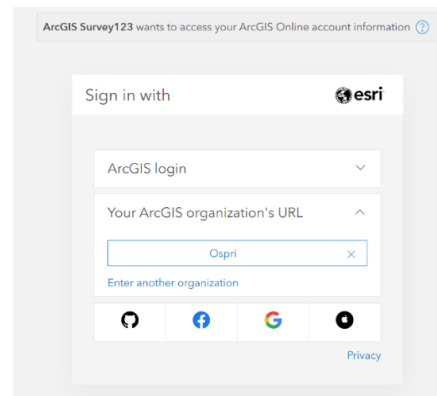
## ANDROID - PHONE OR TABLET INSTALL

1. Go to the play store for your phone e.g. Google play
2. In the search bar enter **arcgis survey123** and press enter.
3. Download/Install the ArcGIS Survey123 app, then open.

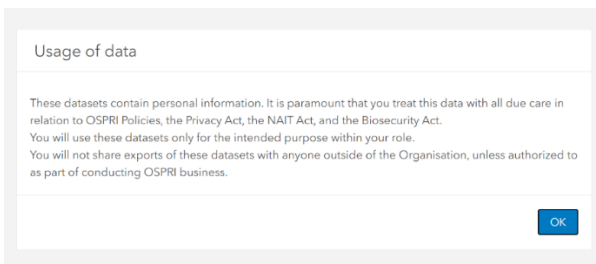


4. If you are an OSPRI staff member, you will need to use the option to login using **Your ArcGIS organization's URL**. When you do this, add the word OSPRI to the URL and sign in using your staff credentials.

For everyone else, login with your **ArcGIS login**.

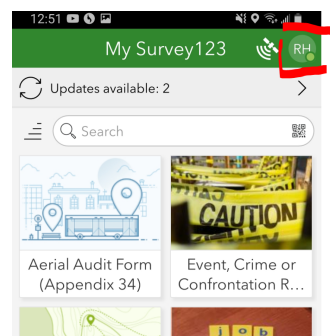


5. Read the usage of data terms and tap **OK...**

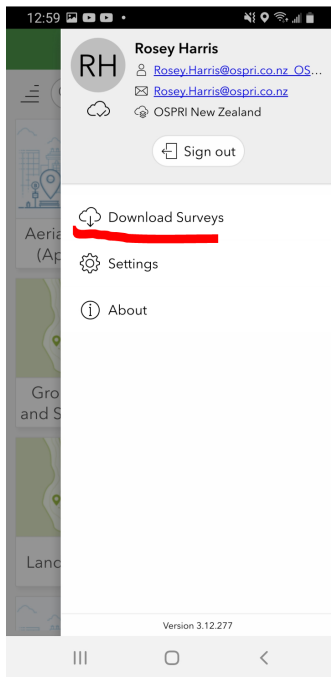


6. If you have used the app before and downloaded some of the available surveys, they should be shown on the screen that loads in the app.

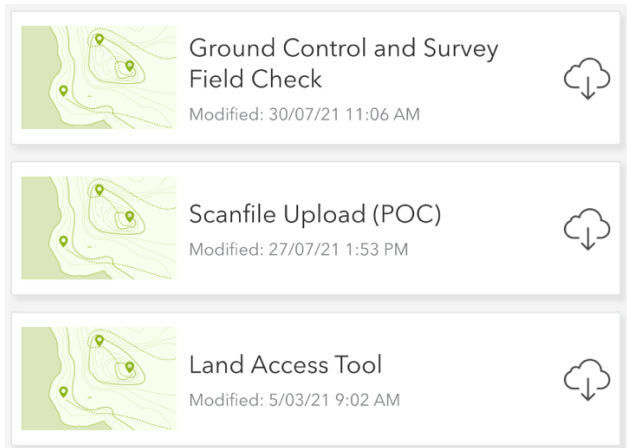
To download other surveys, tap on your initials in the top-right corner of the screen...



7. Tap on **Download Surveys...**

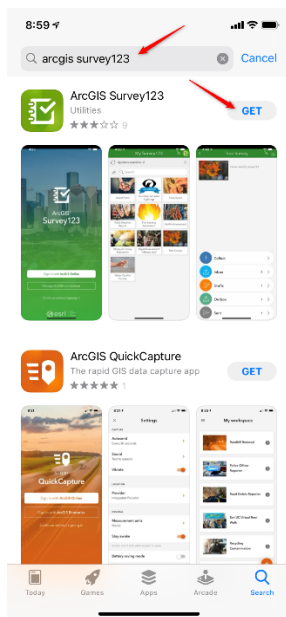


8. You'll then see a number of additional surveys that you can download, similar to this...

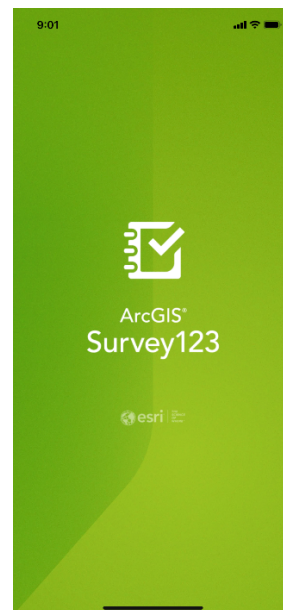


## APPLE - IPHONE OR IPAD INSTALL

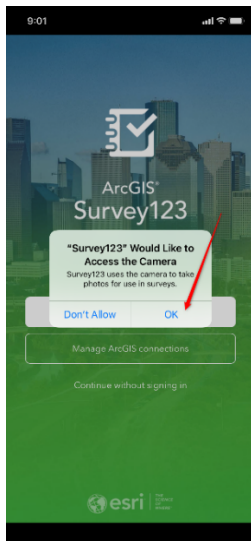
1. On the iOS/iPadOS App Store, search for **arcgis survey123** and tap **Get** to install



2. Launch the app

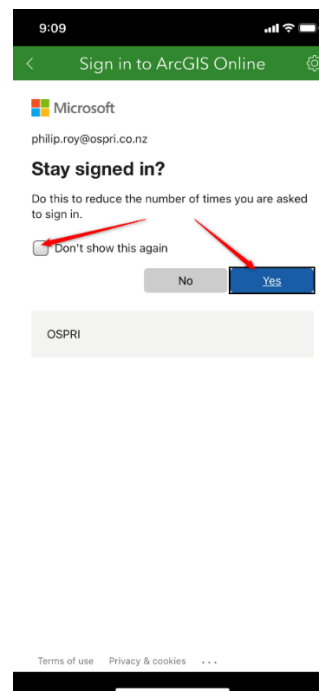
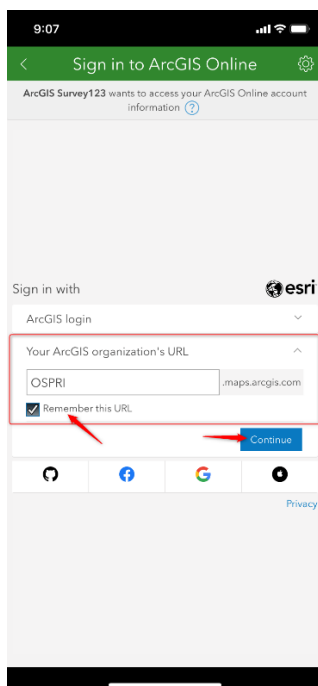


- Survey123 will indicate it needs access to your camera. Tap **OK** as you will be using the camera when completing surveys.
- Tap **Sign in with ArcGIS Online**.

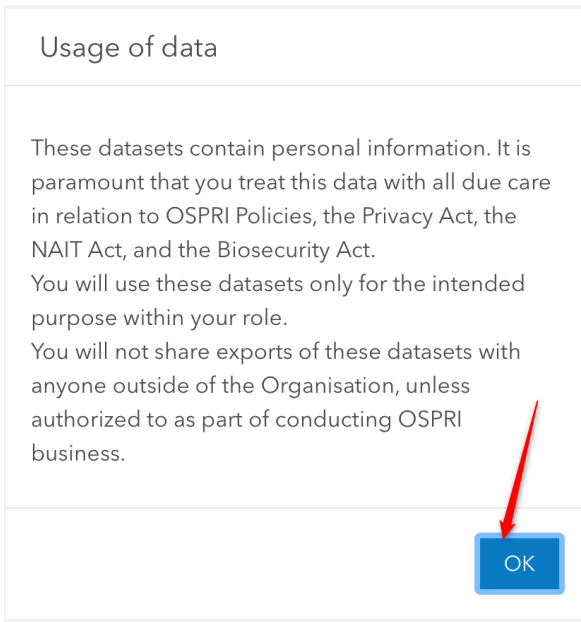


- If you are an OSPRI staff member, you will need to use the option to login using **Your ArcGIS organization's URL**. When you do this, add the word **OSPRI** to the URL, tick **Remember this URL** and sign in using your staff credentials.
- OSPRI staff should also tick **Don't show this again** and **Yes** on the **Stay signed in?** screen

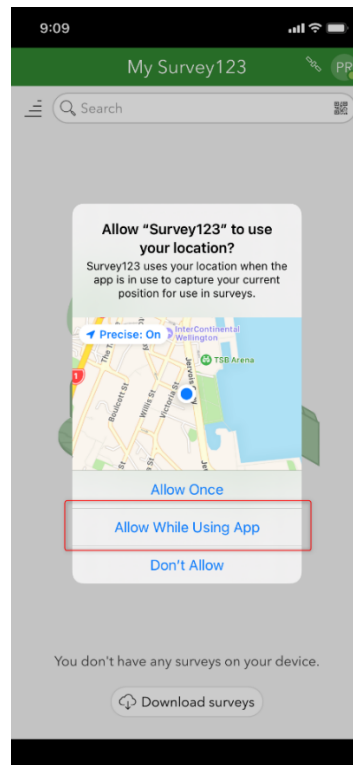
For everyone else, login with your **ArcGIS login**.



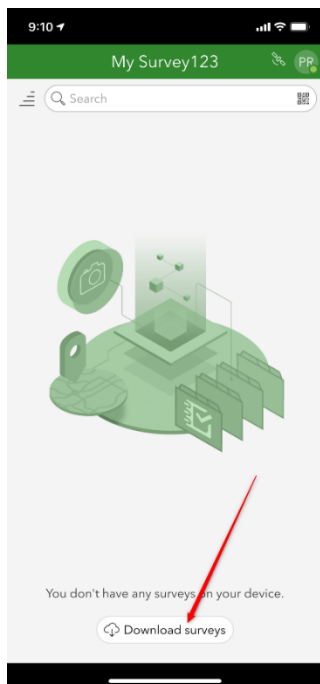
7. Read the usage of data terms and tap **OK**...



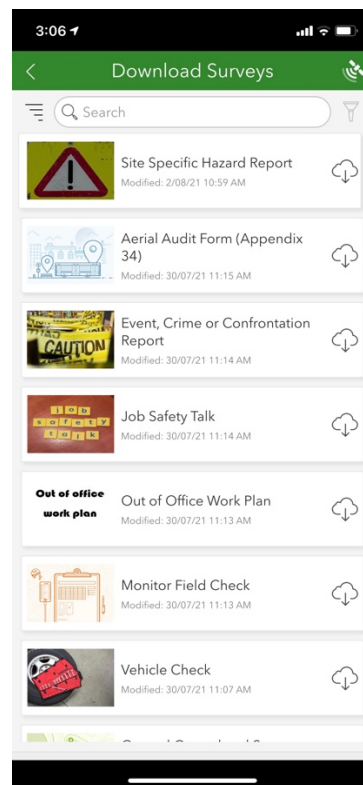
8. Survey123's map feature needs to know your location, so if you see this prompt, tap **Allow While Using App**.



9. If you haven't downloaded any surveys, tap on **Download surveys** at the bottom of the screen.



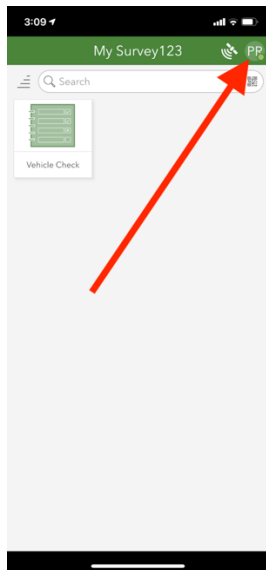
10. You'll then see a number of surveys that you can download...





11. Next time you use the app, the surveys you have downloaded should be shown on the screen that loads.

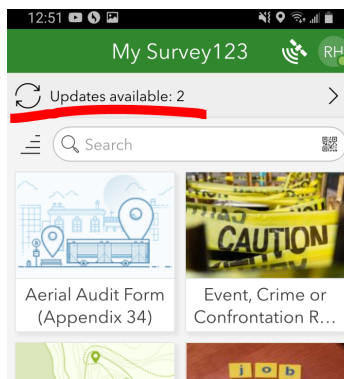
To download other surveys, tap on your initials in the top-right corner of the screen and tap **Download Surveys...**



## UPDATES TO SURVEYS

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If surveys have updates available, it will show at the top of the app:



1. Tap on the wording or >
2. It will take you to the **Update Survey** screen. Tap on **Update Surveys** at the bottom of the screen, and it will automatically update all surveys that have updates available.

*Note - If you prefer to use the Survey123 system from a desktop computer, you can login at - <https://survey123.arcgis.com/>*

*The process for completing a survey using the app or online is discussed in another guide.*

***If you need help, call OSPRI on 0800 242 872***

# SURVEY123

# COMPLETING AND EDITING SURVEYS

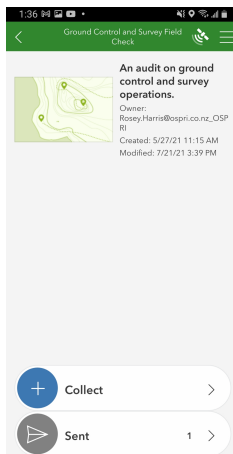
This guide outlines how to complete a survey using the Survey123 app on your phone or tablet, as well as how to complete a survey on a desktop computer. The app cannot be used to generate reports. This is done via a desktop computer and is discussed in another guide.

## COMPLETE A SURVEY ON YOUR PHONE

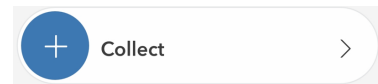
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If you are coming back to the app, the default screen will list the surveys you have downloaded already.

1. To open the survey just tap on it. You will now see a page layout like this...



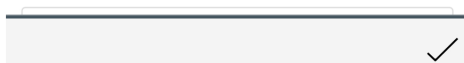
2. Tap **Collect...**



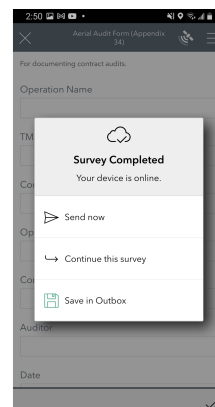
3. The survey is now open, answer each question.

Once completed, **tap on the tick** at the bottom to submit the survey.

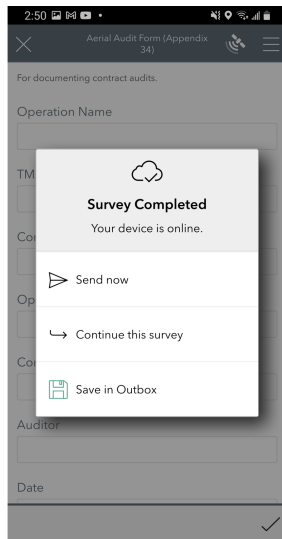
If you are offline, it will save in your outbox and you can then submit it when you are back online (see later in this document for details).



4. If you accidentally tap on the tick before you are finished, tap **Continue this survey** to continue entering in details.



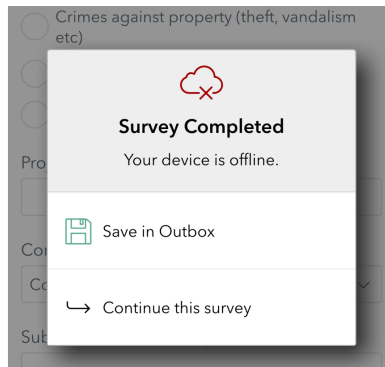
- Note - If you want to save the survey so that you can enter in more details later (before submitting it) after you tap the tick, tap **Save in Outbox** instead.



## HOW TO COMPLETE A SURVEY WHILE OFFLINE

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- Open the Survey123 app as normal and complete the survey. When you tap the tick to submit the survey, the pop-up menu will display. Tap **Save in Outbox**. The section after this explains how to submit the survey later when you are connected.



## UPDATING OR SUBMITTING A SURVEY THAT IS SAVED IN YOUR OUTBOX

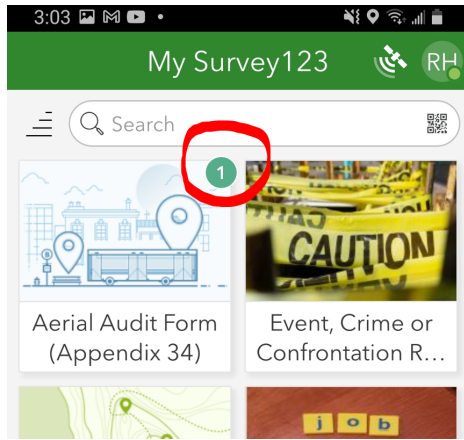
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If you were unable to complete a survey immediately (or you have completed it while offline) it should be saved in your Outbox within the Survey123 app. Here's how to update and/or submit the survey.

**Note:** A survey stored in the Outbox is listed as "Completed Survey" but can be:

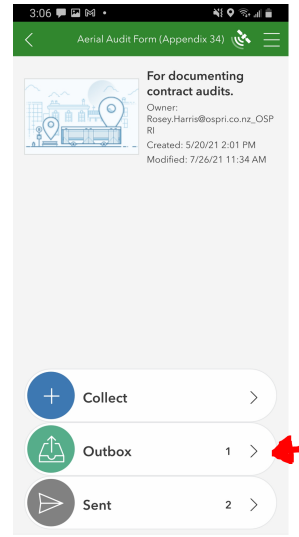
- A survey you completed while offline that you now wish to submit, or
- A partially completed survey that you want to finish and complete

1. When you are ready to complete the saved survey, go into the Survey123 app. Incomplete surveys show with a number in the upper right...

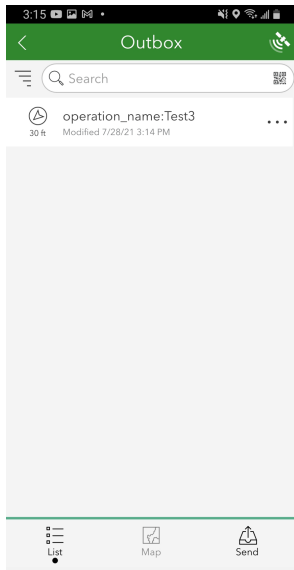


*In this example, there is an incomplete Aerial Audit Form survey that needs to be completed.*

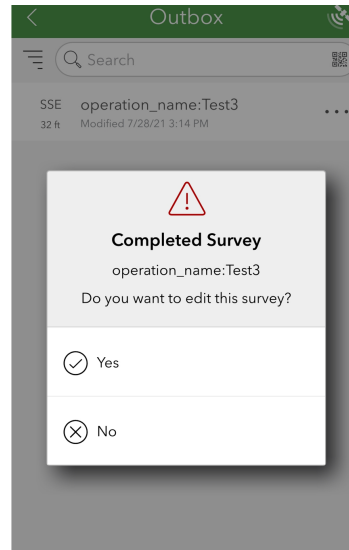
2. Tap on the required survey. You will now see **Outbox** between **Collect** and **Sent**...



3. Tap **Outbox**. This will open your outbox within the Survey123 app...



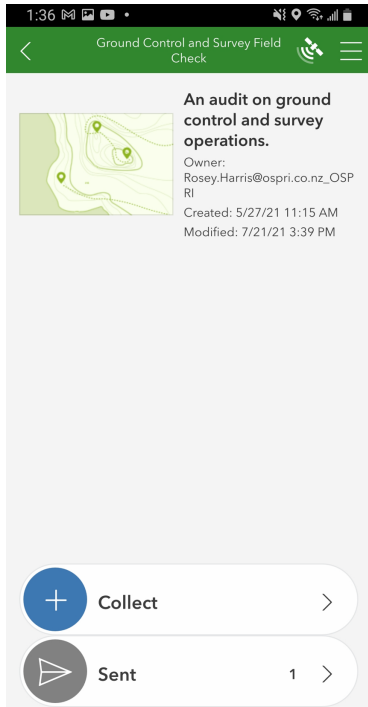
4. From here you tap on your survey again, tap **Edit** and **complete the survey** and **Yes**...



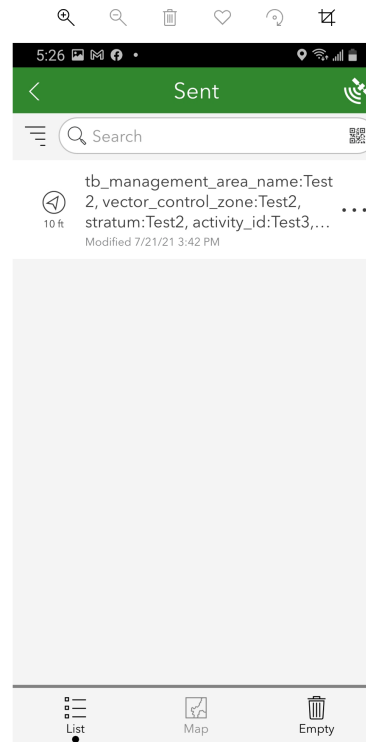
*Follow previous instructions at this point on how to submit a survey.*

# UPDATING OR EDITING A SURVEY THAT HAS BEEN SUBMITTED - ON YOUR PHONE

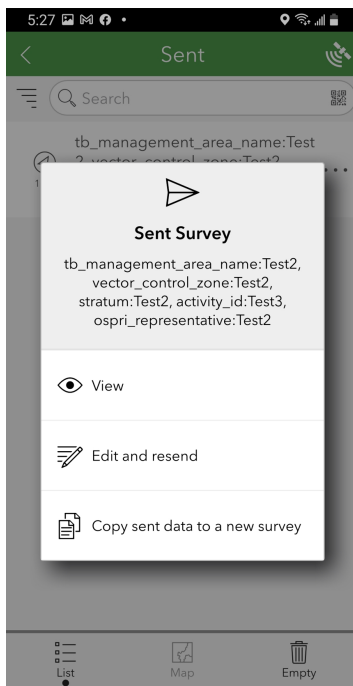
1. Open the Survey123 App and tap on the relevant survey. Tap on **Sent...**



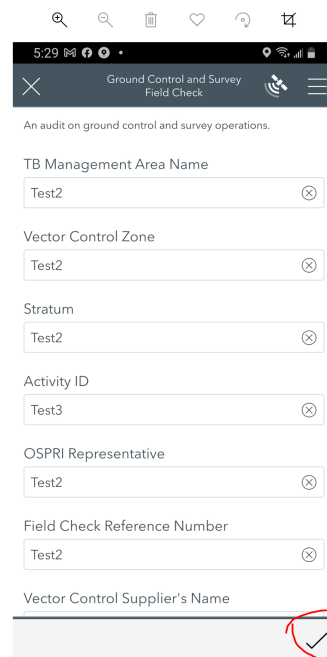
2. Tap the specific survey you want to edit from the list.



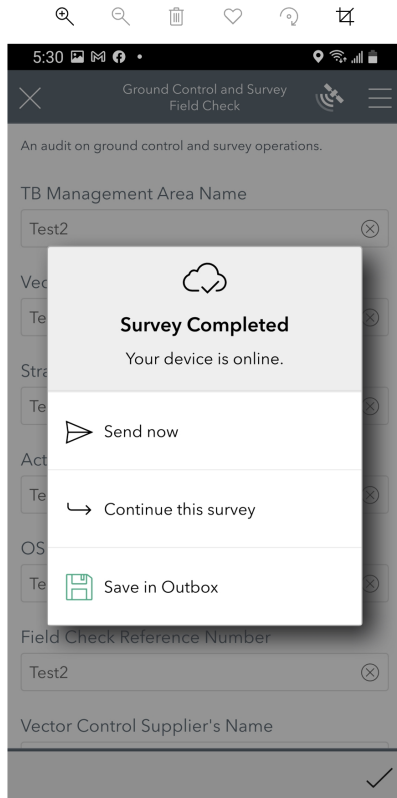
3. Tap **Edit and resend...**



4. Update your survey as required, then **tap the tick** to submit your survey again.



## 5. Tap Send now...



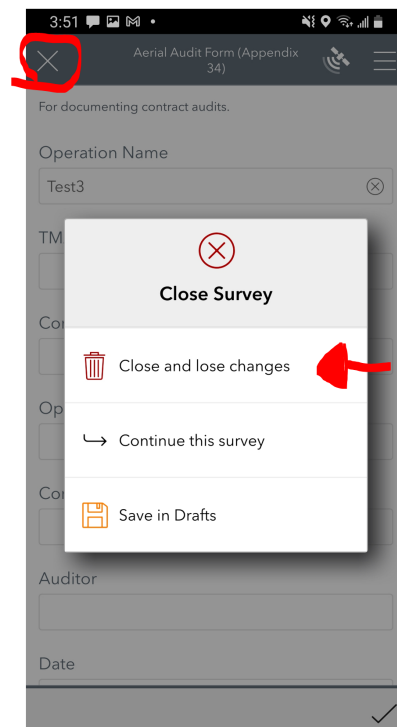
*Your survey has now been updated and sent!*

You'll now be taken back to the list of sent surveys.

Tap the back arrow on that screen to go back to the list of all surveys.

## TAPPING ON THE WRONG SURVEY

If you tap on the wrong survey, you can tap the 'X' in the top-left corner of the survey and a **Close Survey** pop-up will appear. From here you can tap **Close and lose changes** and it will take you back to your list of surveys.

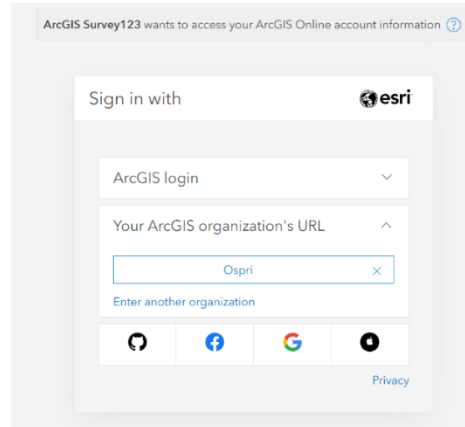


## COMPLETE A SURVEY ON A DESKTOP COMPUTER

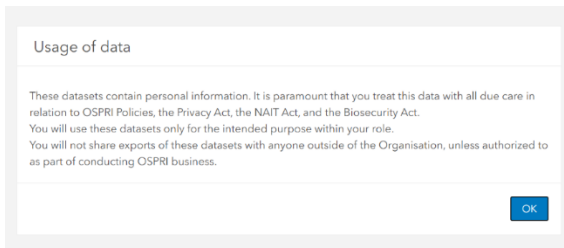
1. Go to <https://survey123.arcgis.com/>
2. Click **Sign In...**



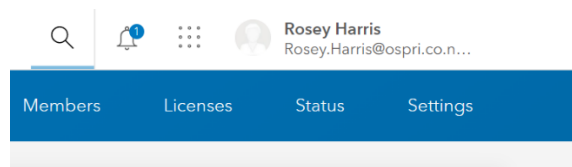
3. If prompted (and you are an OSPRI staff member) click **Your ArcGIS organization's URL** and type **OSPRI**. Otherwise click on **ArcGIS Login...**



4. If prompted, enter your login details (OSPRI email and password for OSPRI staff).
5. Read and accept the **Usage of data** pop-up by clicking **OK...**

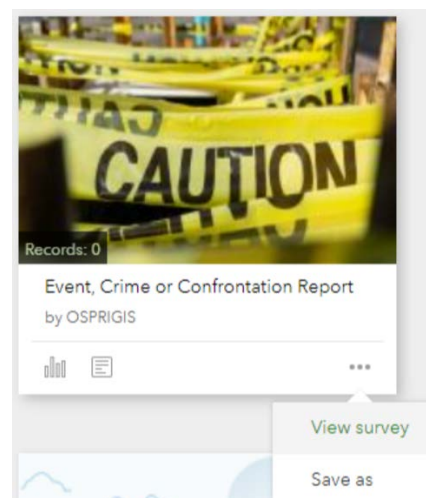
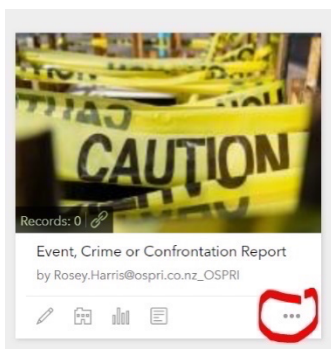


6. You are now logged in. Your name will now show in the top-right corner.



In the following example we'll use the **Event, Crime or Confrontation Report** survey.

1. Click ... on the bottom-right of the survey...
2. Click **View Survey...**



- This will open the survey in a new tab.

Complete the survey by answering the questions, then click **Submit** at the end.

Contracting company\*  
Other test

Sub contractor company (if applicable)  
bob

Photos  
fire.JPG 75.5KB

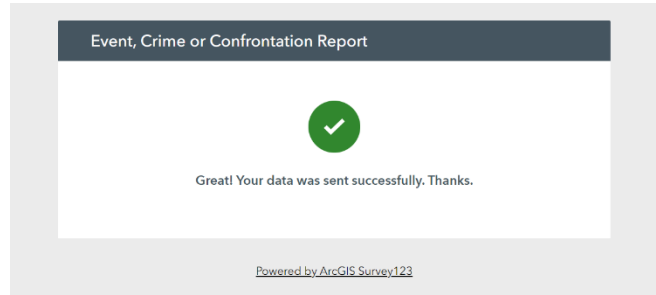
What happened, what is the situation?  
trying to figure out the user experience

What action did you take?  
give it a go myself.

Does further action need to be taken?  
I need to write documentation.

Submit

- It will then submit your survey



You can now close that tab and go back to the original tab with all the surveys and pick any other survey that you need to complete.

*And bing budda bang - You're a master survey filler inner!*

## EDITING A SURVEY ON YOUR DESKTOP COMPUTER

- Login to Survey123 (ArcGIS Online) and follow the previous instructions to get to your survey.
- Click on the appropriate survey, you will be taken to the **Overview** page for that survey.
- Click **Data** in the green menu...

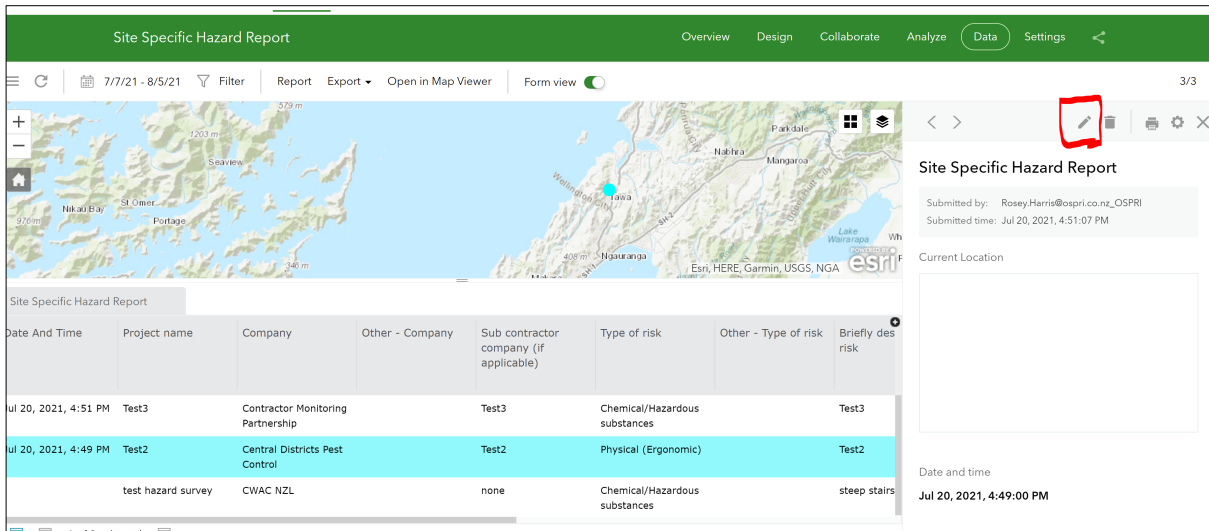


- Under data, all the surveys you have submitted will be shown. Scroll and click on one the one you want to update. If there are a lot of surveys listed, use the date filter to narrow down the list to find the one you are after.

Date And Time	Project name	Company	Other - Company	Sub contractor company (if applicable)	Type of risk	Other - Type of risk	Briefly describe the risk	Have you done anything about it?	If yes don
Jul 20, 2021, 4:51 PM	Test3	Contractor Monitoring Partnership		Test3	Chemical/Hazardous substances		Test3	No	
Jul 20, 2021, 4:49 PM	Test2	Central Districts Pest Control		Test2	Physical (Ergonomic)		Test2	No	
	test hazard survey	CWAC NZL		none	Chemical/Hazardous substances		steep stairs	No	

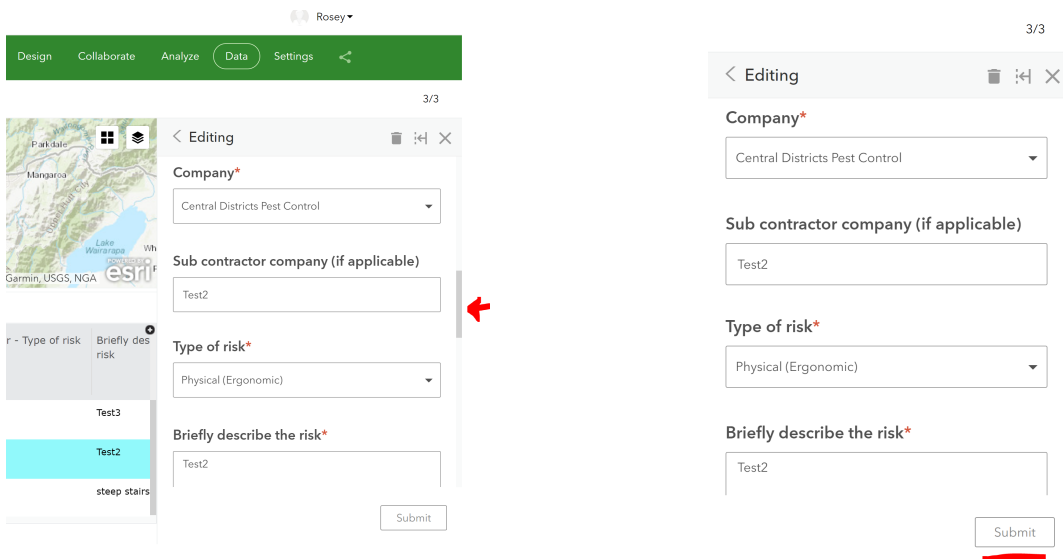


5. Once you have clicked on your survey, a side panel will appear on the right. Click the edit (pencil) icon...



6. Your submitted survey is now displayed on the right. Use the scroll bar to find the question(s) you wish to update.

7. Once you have updated your survey, click **Submit** in the lower right-hand corner...



*Your survey is now updated!*

Once one more surveys have been submitted, it's possible to generate reports based upon them. However, the app cannot be used to generate these reports. This is done via a desktop computer and is discussed in another guide.

**If you need help, call OSPRI on 0800 242 872**

# SURVEY123

# CREATING REPORTS

v1.1

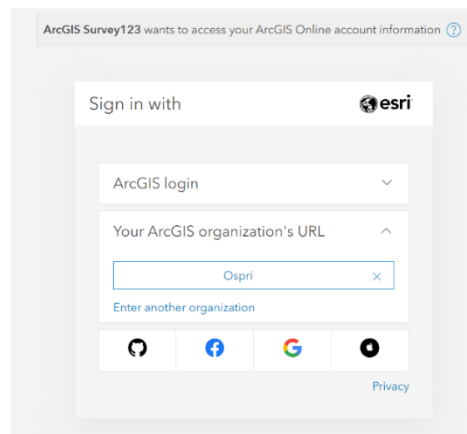
This guide outlines how to generate reports online, using a desktop computer. The Survey123 app cannot be used to generate reports.

## CREATING AND EXPORTING A REPORT ON YOUR DESKTOP COMPUTER

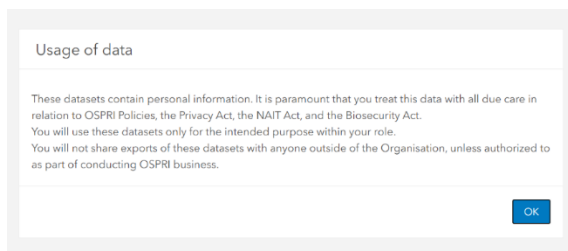
1. Go to <https://survey123.arcgis.com/>
2. Click **Sign In...**



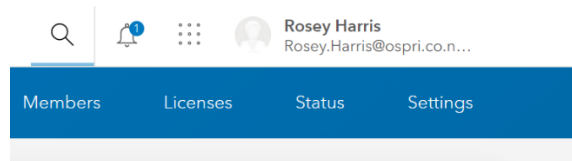
3. If prompted (and you are an OSPRI staff member) click **Your ArcGIS organization's URL** and type **OSPRI**. Otherwise click on **ArcGIS Login...**



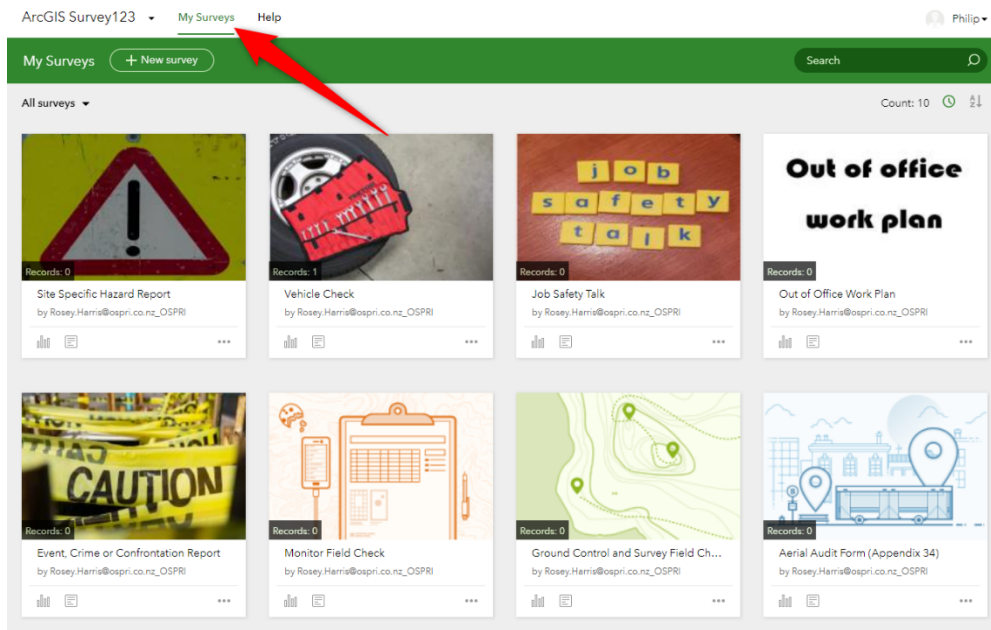
4. If prompted, enter your login details (OSPRI email and password for OSPRI staff).
5. Read and accept the **Usage of data** pop-up by clicking **OK...**



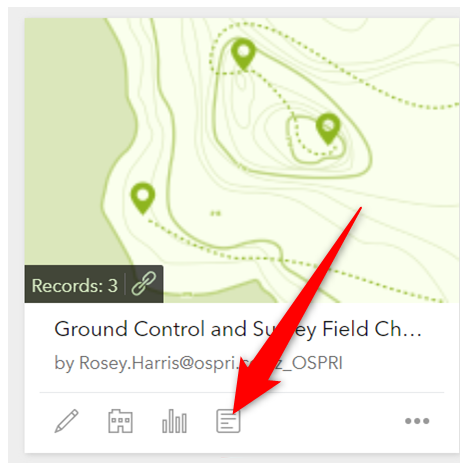
6. You are now logged in. Your name will now show in the top-right corner.



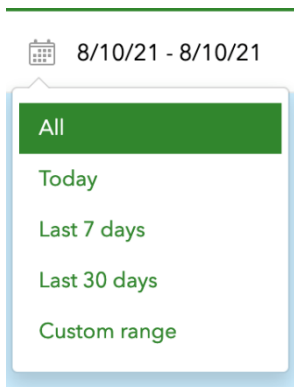
7. If the list of surveys that you have access to aren't already displayed, click **My Surveys**...



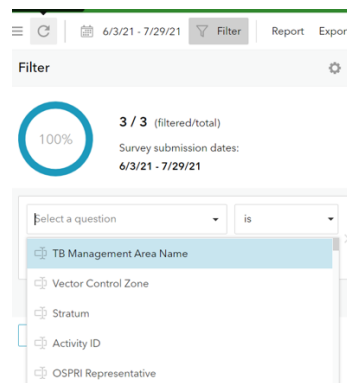
8. Click the **Data** icon on the survey you want to export a report from...



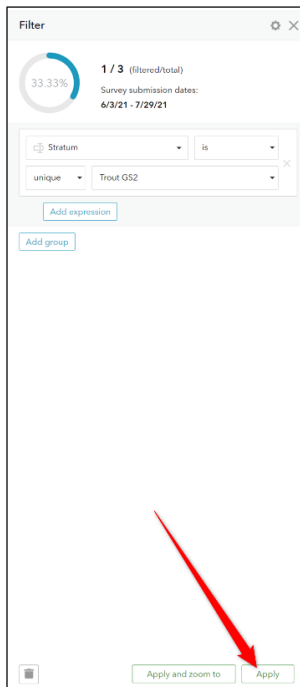
9. This opens the data page for that survey type, where you can see a snapshot of all the responses to that survey that have been submitted. To select a particular record, you can **Filter** by date using the calendar icon...



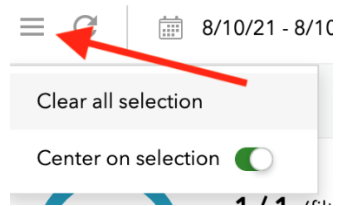
10. Or tap the **Filter** button and create a more complex series of options to refine your search and show only the surveys and data you are interested in.



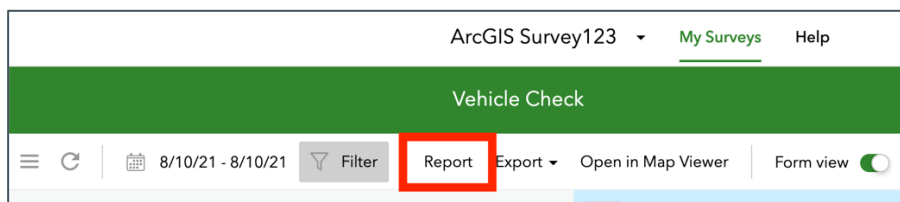
11. Then click the **Apply** button at the bottom of this tab to apply this filter.



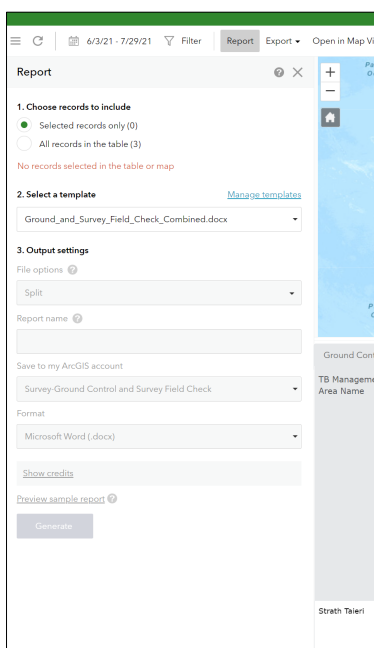
12. If you need to clear your selection tap the 'hamburger' icon in the upper left...



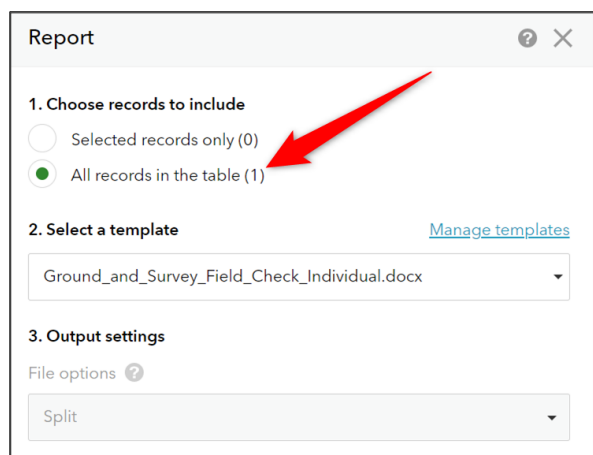
13. To export your individual report, tap on **Report...**



14. The report menu will appear.



15. Click the circle next to **All records in the table**, as this is what you used the filter for.



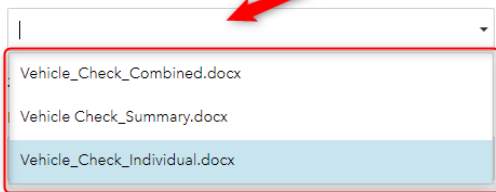
16. Select a template:

- If you are using data from one survey only, choose the Individual template.
- If you are selecting multiple survey data, select the Combined template.

1. Choose records to include

- Selected records only (0)
- All records in the table (1)

2. Select a template




17. Currently the Report name defaults to a name with a lot of unusual detail at the end of it:

Ground Control and Survey Field Check\_OID1\_20210729143846

18. Replace "OID1" and the subsequent text with the following...

`{CreationDate}_{Creator}`

Report name  \*

Ground Control and Survey Field Check\_{CreationDate}\_{Creator}

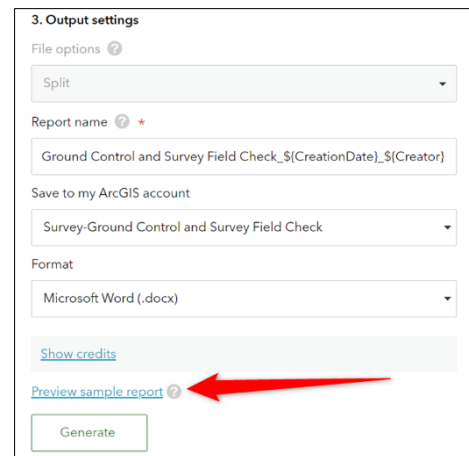
Another example - `Vehicle Check_{CreationDate}_{Creator}`

This will pull the date and who submitted the report from the survey. So for example your report name will be:

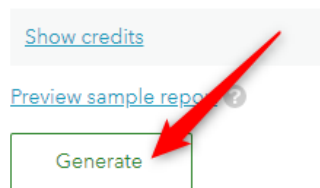
Ground Control and Survey Field Check\_June 3\_2021 8\_09 AM\_Jeffrey\_Benson\_ospri\_co\_nz\_OSPRI

**Note** - OSPRI pays for the generation of a report via a credit system. In the instructions that follow, please generate a Preview sample report first (which is free) before producing a final report.

19. Click **Preview sample report** first to generate a sample report that can be viewed at no cost.



20. Make any adjustments you need, to produce the desired outcome and preview the report again. Leave the rest as the default settings and tap **Generate** when you are ready to generate the report...



This will now download the report to your computer. You can email/view the report from there.

**If you need help, call OSPRI on 0800 242 872**