

Setup and Usage Guide for the iMapInvasives Survey123 Form

Installing the app and downloading the survey form

1. Download the Survey123 for ArcGIS app

- a. For easy reference, use one of the following links to download the app, depending on your device's operating system.

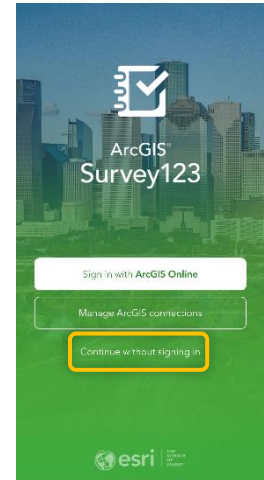
Link to the Apple App Store:

<https://apps.apple.com/us/app/survey123-for-arcgis/id993015031>

Link to the Google Play Store:

play.google.com/store/apps/details?id=com.esri.survey123

- b. After opening the Survey123 app for the first time, you do **not** need to click “Get Surveys” or sign-in to an ArcGIS Online Account – instead simply proceed to the next step (tap “**Continue without signing in**”)



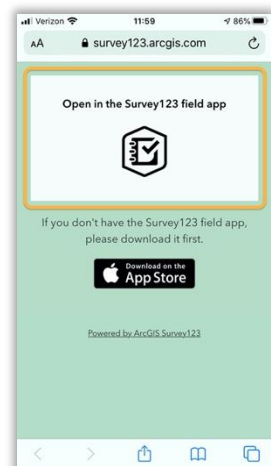
2. Setup the iMap Survey Form

- a. Once the Survey123 app has downloaded and installed, open a web browser on the device and go to the following short URL:

<https://arccg.is/vfeTW>

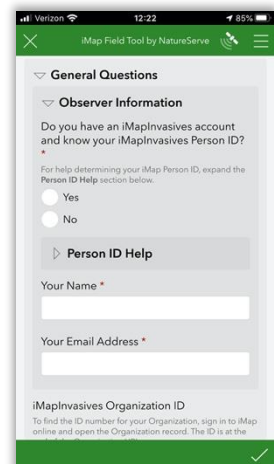
- b. Once the page loads, tap the gray box titled: **Open in the Survey123 field app** (circled in orange, right).

Note, on iOS devices, this step may happen automatically.





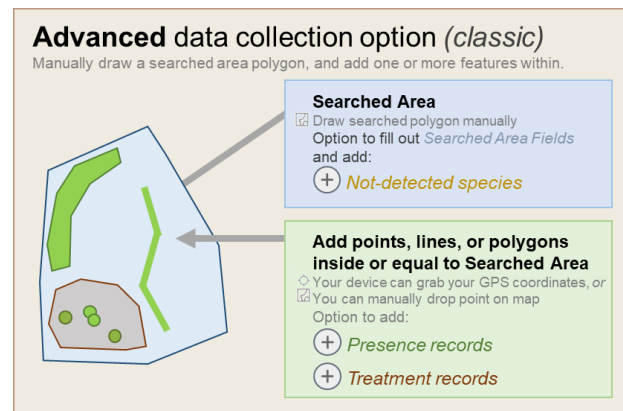
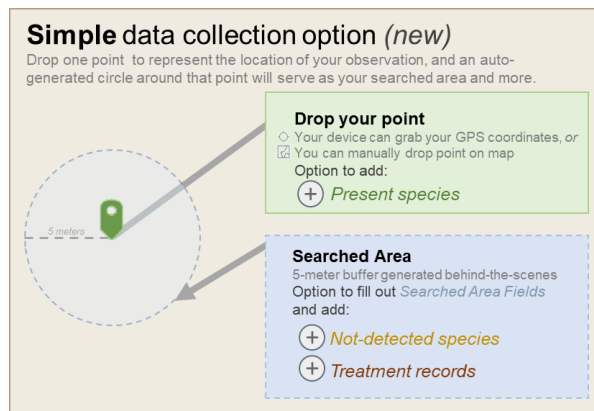
- c. The iMapInvasives Survey123 form will then download into the Survey123 app.


Once the survey form is visible (similar to the screenshot at right), it is downloaded and ready for use offline.




General iMap Survey123 Form Tutorial

1. Complete the **General Questions** section, which includes information about the observer, date, and the state/province in which the record is being created. *You must select your **State/Province** to advance further than this point.*
2. You have two options for **Geographic Data Collection**:
 - a. **Simple** (new option): Drop a single point to indicate your entire observation.
 - Quickest data collection option; recommended for volunteers
 - You will be prompted to drop a point, either by tapping  to automatically place the point at your current GPS location, or by tapping  to manually select your location on a map.
 - *Behind-the-scenes, a Searched Area Polygon is created with a 5-meter buffer around your point. This polygon will be used for any not-detected species and treatment records you add.*
 - b. **Advanced** (classic option): Draw a polygon to represent a searched area, and add presence, not-detected, and/or treatments within or equal to that searched area.
 - You will be prompted to draw a **Searched Area Polygon** on the map. (Ensure that the polygon is large enough to encapsulate and Presence and/or Treatment records which will also be associated with the record.)

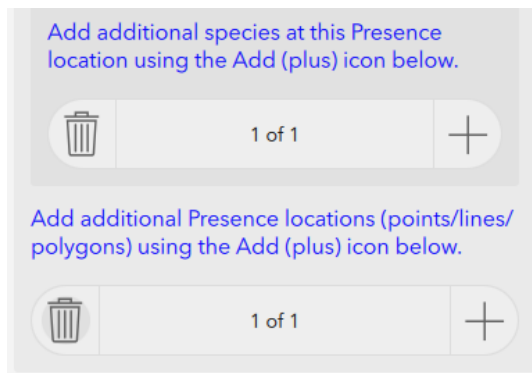


3. Complete any **Searched Area Attribute Fields**, as desired to describe the searched/surveyed area.
4. Create **Presence** record(s), as desired.
 - a. If you selected the **Simple Data Collection** option above, click the “+” button under **Presence Records**, and the point you collected earlier in the survey will be used for your presence record.
 - b. If you selected the **Complex Data Collection** option earlier in the survey, Select the geometry type to represent the Presence – point, line, or polygon.
 - Use the Map icon  to create a line or polygon.

- If representing the location as a Point, tap the Target icon  to place a point at your current location.

c. Indicate the **Present Species** associated with the record.

- Start by entering the species. Search for a specific species by either scientific or common name using the auto-complete dropdown. (Note that the species list will be filtered to the tracked state/province list which was selected in the **General Questions** section.)
- Complete any remaining fields representing the Present Species as desired.
- Once your Present Species record is complete, you can:



- Create an additional Present Species (to record additional species at this particular point/line/polygon location) using the first set of Delete (trash) or Add (plus sign) icons.


- If you selected the **Advanced Data Collection** option earlier in the survey, you can also create another Presence record (to create a new Presence point/line/polygon) using the second set of Delete (trash) or Add (plus sign) icons.

5. Create **Not Detected** record(s), as desired:


- To create a Not Detected record, select the plus icon within the **Not Detected Records** section.
- There is no polygon to create, as the entire **Searched Area** polygon will represent the area in which the species was not detected.
- Complete any other desired fields.
- If needed, add additional Not Detected records using the Delete (trash) or Add (plus sign) icons within the **Not Detected Records** section.

6. Create **Treatment** record(s), as desired:

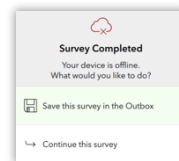
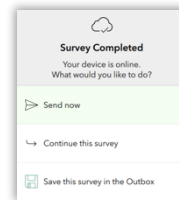
- Within the **Treatments Applied** section, add a new treatment record using the plus icon.
 - If you chose the **Simple Data Collection** option earlier in the survey, your treatment polygon will be automatically created behind-the-scenes (5-meter buffer around your observation point)

- If you chose the **Complex Data Collection** option earlier in the survey, you must create a polygon to represent the treated area.
 - a. To use the Searched Area polygon to represent the treatment area polygon, select **Yes** to the **Use entire Searched Area for this Treatment record?**
 - b. Otherwise, select the map icon  to create a new polygon. (Note that the treatment polygon should fall within the Searched Area polygon.)
- b. Complete the remaining treatment fields as desired. Note that certain fields will be displayed based on selections to other fields.
- c. If needed, add additional Treatment records using the Delete (trash) or Add (plus sign) icons within the **Treatments Applied** section.

7. Upload the record

- a. Once the record is complete, click the Check icon  at the bottom right of the survey form.

- The survey form will be validated for errors.
- If connected to the internet and the form passes validation, it can either be uploaded immediately or saved to the **Outbox** (which queues records for later upload).
- If offline, the validated record can only be saved to the Outbox.
- To upload records from the outbox: Once connected to the internet, return to the main **iMapInvasives Survey123 App** menu and select the **Outbox**, where the records pending upload will be visible. To upload all records pending upload at once, select the **Send** button.



- b. Note that it may take up to an hour for the record to be visible in the iMapInvasives online platform, and that all Presence records will be entered as “Unconfirmed.”

General Usage Tips

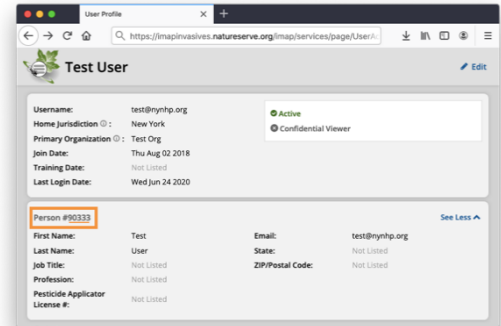
- Utilize the **Favorite Answers** feature after you have completed the **General Questions** section. This will save time and avoid the need to type your basic information every time you create a survey. **See next page for details.**
- If you have an iMapInvasives account, determine your **Person ID** before using the survey form.

To do so, sign-in to your account from a web browser:

imapinvasives.natureserve.org/imap/login.jsp

Then select the main menu at the top left and select **My Account**. Your Person ID will be visible on this page.

For example, in the screenshot (right), the Person ID is **90333**.



- **Required Fields Error Message:** If you tap the “+” button to create a presence, not-detected, or treatment record, you are required to fill out species and other key fields to submit your record. If you have changed your mind (e.g., you added a not-detected record to see what it would look like, but then decided not to use it), be sure to delete the record you started by tapping the trash can icon underneath.
- Tips when using the **Complex Data Collection** option:
 - Create a Searched Area polygon that is large enough to contain the Presence, Not Detected, and Treatment areas.
 - Once a Searched Area polygon is created, it can be utilized as the Presence polygon and/or Treatment polygon. See specific instructions above for more details.
 - Treatment target species should have an intersecting Presence record for the same species. If you are not certain if a Presence record already exists in iMapInvasives for the treatment target species, please create an accompanying Presence record in Survey123.
 - Utilize GPS for polygon or polyline: When creating a line or polygon, your current GPS location can be utilized to create a vertex at your current location. To do so, select the icon of a target accompanying a vertex (circled in orange in screenshot, right).



Utilizing the “Favorites” Feature

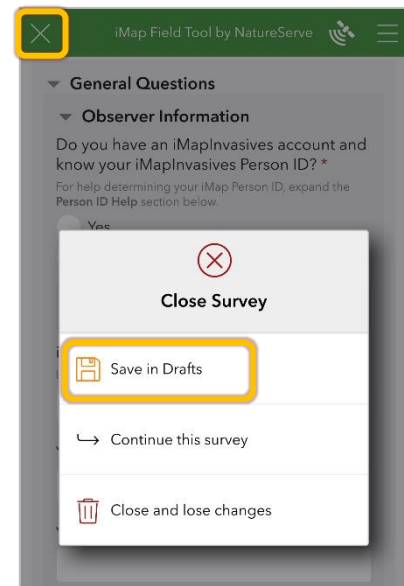
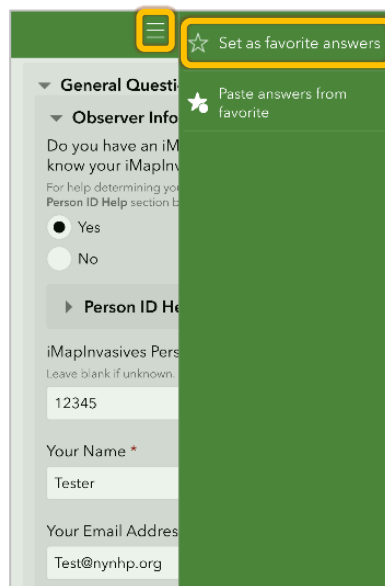
To save certain information (e.g. Person ID) so that you do not need to re-enter the same data each time you start a new record, set **favorite answers** in a new survey and **save as a draft**:

1. Start a new survey, and populate fields you expect to be consistent among all records you will submit.*
2. Open the menu by tapping the icon in the upper right corner.
3. Select **Set as favorite answers**.
4. Tap the **X** in the upper left of the survey
5. Select **Save this survey in Drafts**.

* We recommend only setting favorite answers for fields in the **General Questions** section, including:

- ✓ iMap Person ID
- ✓ Your Name
- ✓ Email Address
- ✓ State/Province**

**If you collect data in multiple states or provinces, be sure to select the correct State/Province for each record you submit.



Now you are ready to populate any new surveys with your saved favorite answers:

1. Start a new survey.
2. Open the menu by tapping the icon in the upper right corner.
3. Choose **Paste answers from favorite**.
4. Your previously specified answers will now be populated in the survey.

For more information on using the **Favorites** feature, see the section of this Esri support document titled *Favorite answers*:

<https://doc.arcgis.com/en/survey123/desktop/create-surveys/prepopulateanswers.htm>