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Survey123: Field App

OVERVIEW:

Survey123 is a digital platform that allows for easily customisable surveys to capture discrete field data. There are a number of benefits to having digital field data capture, such as:

- Allowing for more information to be collected than paper-based systems.
- Data can move directly to a desired end point.
- Creates the ability to sense check entries to minimise errors.
- Opportunities for diverse ways to capture data.
- Standardises response options to allow for better data analysis.

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DOWNLOADING THE APP:

On the device you intend to use Survey123 in the field, open the App Store. Search for Survey123. Download the Survey123 App as pictured.

Note: Intermittently some versions require minimum iOS versions to enable the download and operation of the Survey123 App.



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SIGNING INTO THE APP:

Using the Survey123 field App requires the user to be signed in to an ArcGIS user account. Horizons has a 'corporate account' that allows most staff to log in using their normal network username and password.

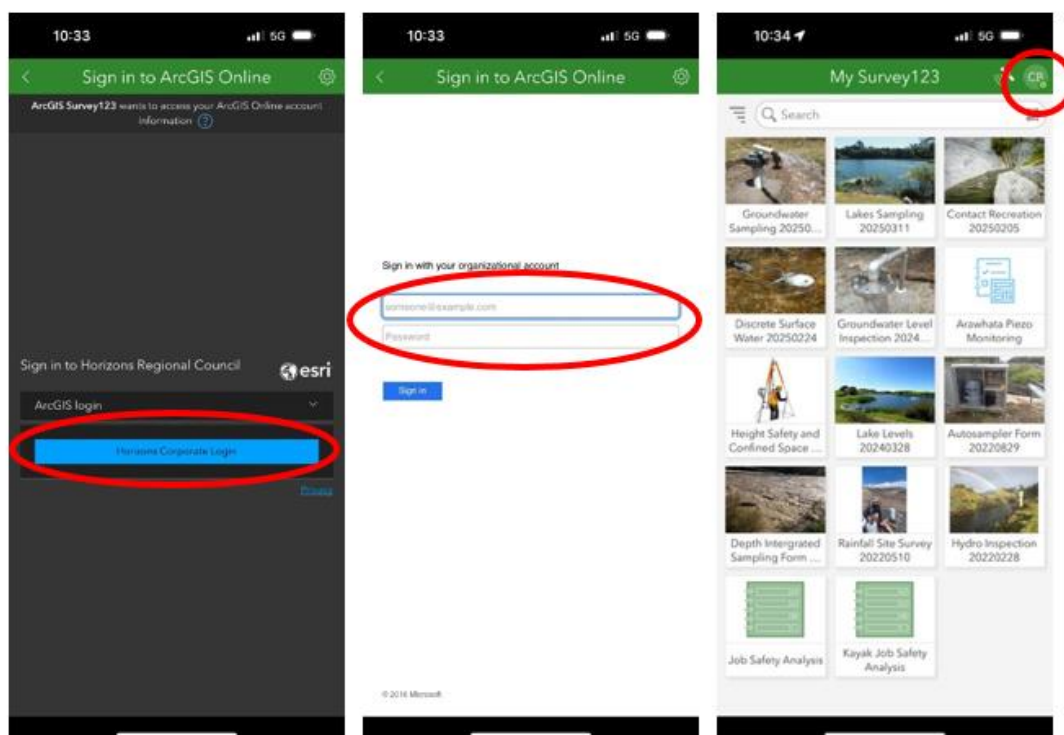
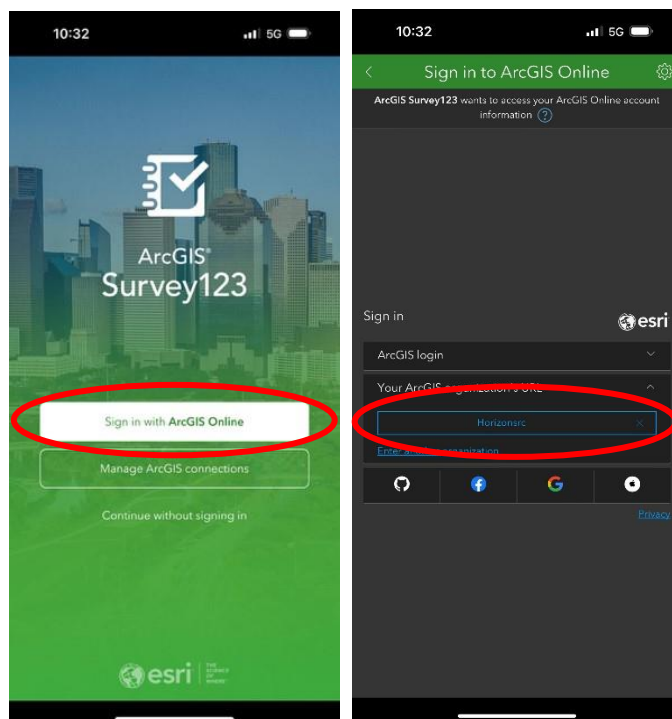
There is a multi-step process to logging in:

1. Open the App.
2. Tap "Sign in with **ArcGIS Online**".
3. Tap the "Horizonsrc" button in the blue square.
4. Tap the blue "Horizons Corporate Login" button.
5. Sign in using your normal Horizons network login and password.

This brings you to the "My Survey123" page and you will see your initials in the top right corner.

Surveys that you have downloaded appear on this screen.

Note: If you are using a shared device, it is important to ensure that you are the person signed in to the App. Check the initials, if this is not you sign out the previous user before signing in as yourself.



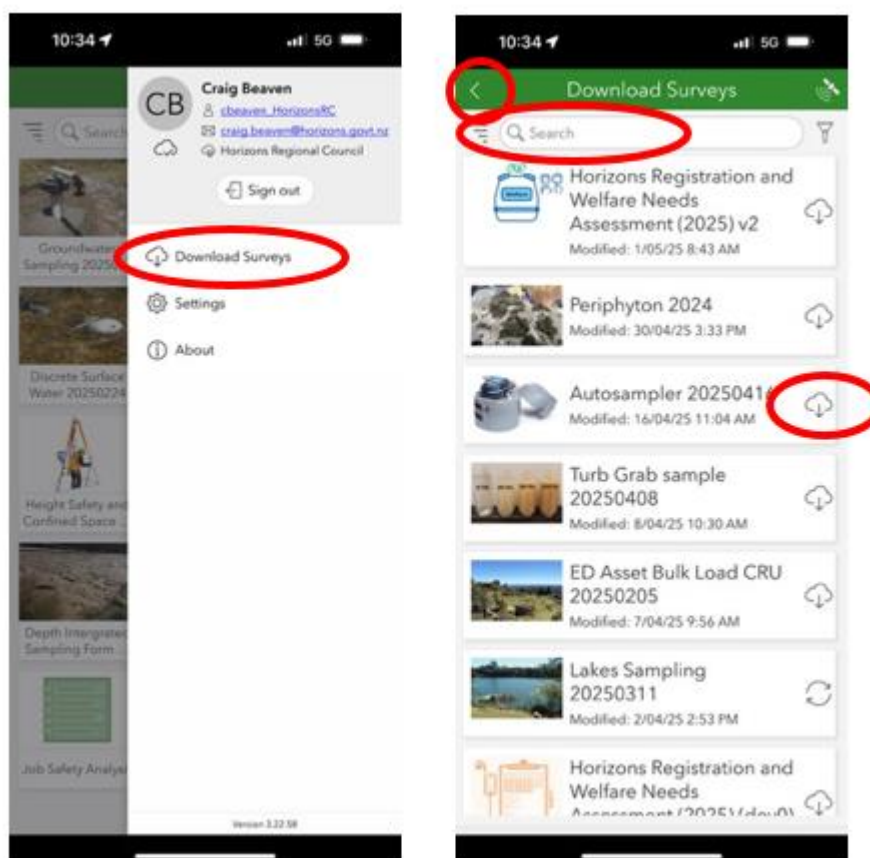
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DOWNLOADING SURVEY FORMS:

To download a field survey:

- From the “My Survey123” page, tap your initials in the top right of the screen.
- Tap “Download Surveys” from the popup menu.
- Scroll through available surveys or use the search function to narrow the list.
- Tap the ‘download’ button of the survey you wish to download.
- You can download multiple surveys at one time.
- Downloaded surveys appear on the “My Survey123” page.
- Use the ‘back’ arrow to return to the “My Survey123” page.



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UPDATING SURVEY FORMS:

There are two types of form updates:

1. **Significant Update:** Surveys that have had major changes that require an entirely new Survey to be downloaded.
2. **Minor Updates:** Surveys that have had small changes that require an update to a previously downloaded survey.

Significant Updates

When major changes occur, there is usually a need to co-ordinate the release of updates so that all users are using the same version of a particular survey. For this reason, you should get notified prior to a version release. The notification will indicate the name of the new version and what date it should be used from.

Update steps:

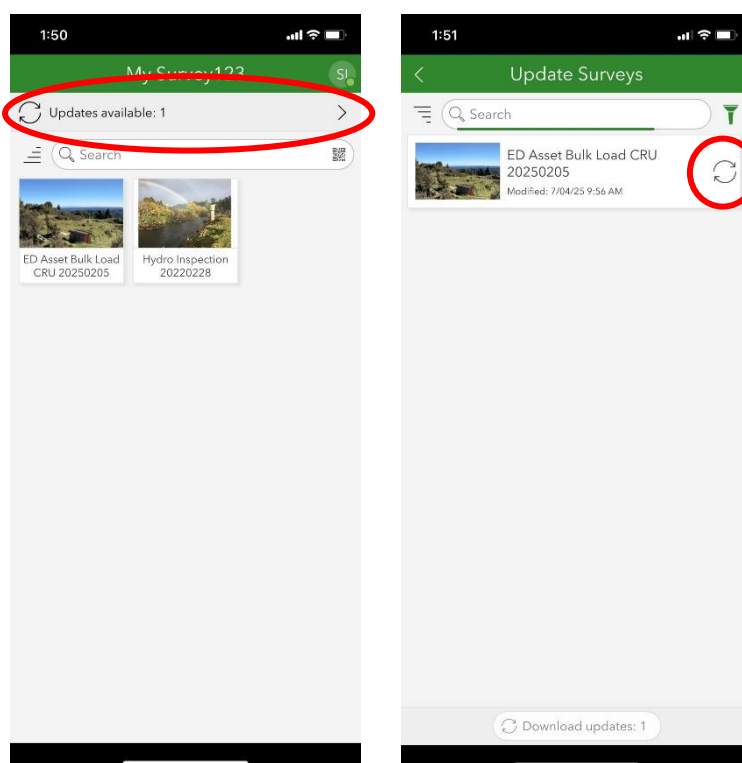
- Check the old survey version. Ensure all completed surveys have been 'sent' and there is nothing in your 'outbox'.
- Download the new version of the survey as directed by the survey developers. This will have a name that includes a more recent date in the title.
- Begin using the new survey version from the date as directed by the survey developers.
- Delete the old version of the form.

Minor Updates

Minor updates are mainly cosmetic in nature and allow for multiple versions to submit to the same backend infrastructure. Therefore, they can be rolled out with less co-ordination.

When an update is available, most surveys will require you to update it to the latest version when you try to open it. Follow the prompts as necessary to do this.

Alternatively, when you land on the "My Survey123" page there could be an 'update indicator' near the top of the page indicating that there are updates available. Tap this and update any forms as directed.



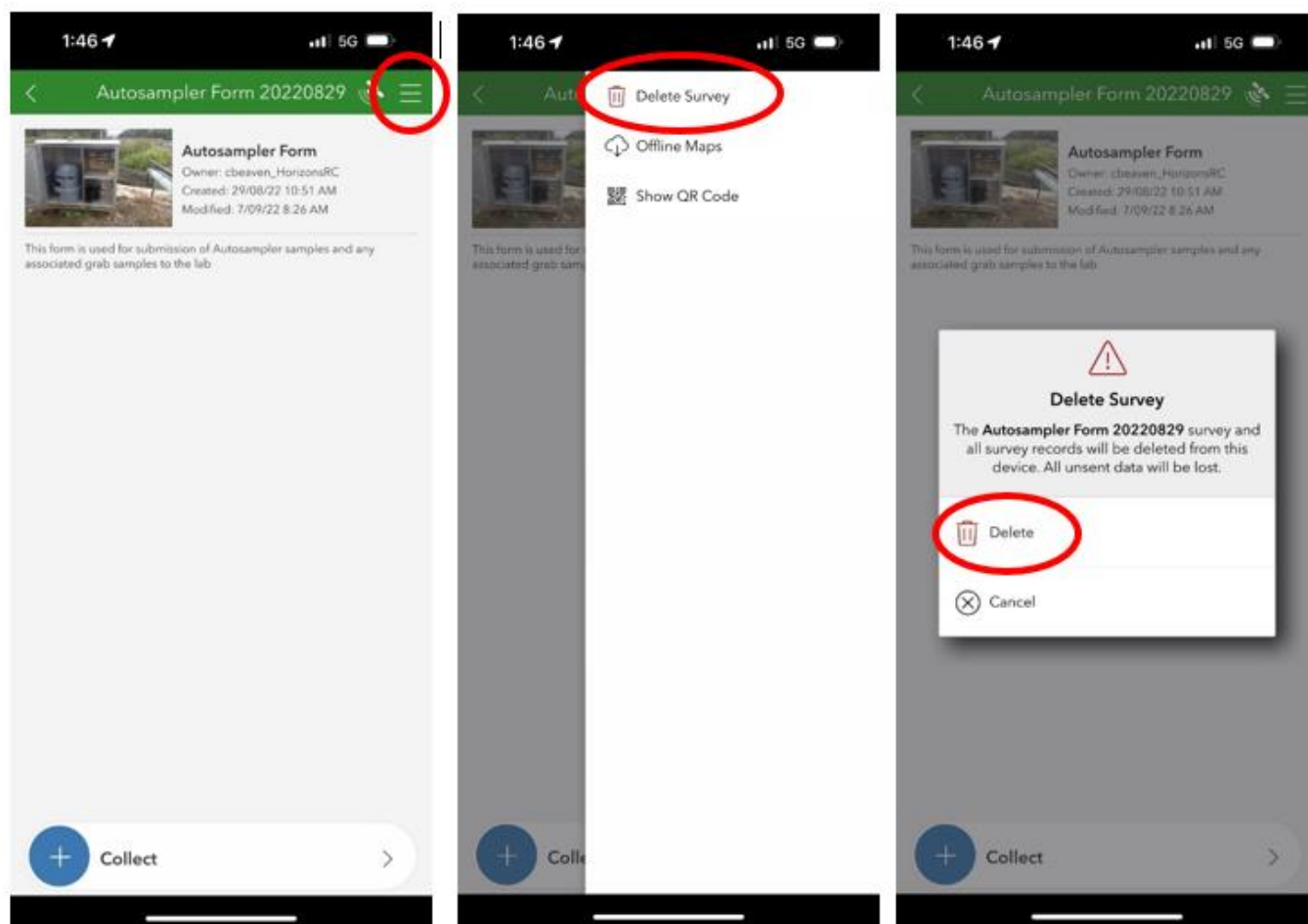
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DELETING SURVEY FORMS:

When a survey is replaced or becomes obsolete it needs to be deleted from devices to ensure they are not accidentally used.

- Tap (not hold) the survey form to bring up the general information of that survey.
- Tap the menu button in the top right of the page.
- Select "Delete Survey" from the popup menu.
- Select "Delete" from the popup window.



COMPLETING SURVEYS:

Survey forms have been designed to make it easy for field staff to complete. Questions are in a logical order designed to match the intended use. As with any system, there are limitations in how they work. This section offers instructions on how to get the best out of your forms.

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1. Sign In:

CHECK YOU ARE SIGNED IN TO THE APP!

Before leaving cell phone coverage ensure you are signed in to the App. Your initials will appear in the top right corner of the App when you are signed in. The App sometimes logs you out of its own accord, so it is important to check this regularly while still in cell phone coverage. You cannot sign in if you are out of coverage.

Surveys can be completed offline, but critical functionality can be lost.

Surveys will have offline functionality built in, but this should only be used as a last resort.

2. Check the Survey Form (While in cell coverage):

- Ensure that the survey form you intend to use is downloaded and up to date.
- Open the form by tapping on it and tapping the “Collect” button.
- If the form automatically displays “Person logged in to the device” then check this is you.
- If your form makes use of the scanning function check the fields don’t have “JavaScript functions are disabled.” This is an indication you are not signed in.

3. Filling Out the Form:

Work your way through the form filling out as much information as possible.

Compulsory Fields: Fields marked with an asterisk must have an entry before the form can be submitted such as the ‘Sample Number’ field in the example above.

Alerts: If a message appears just below the field you have just filled out, it usually is an alert that there might be something wrong with that entry. Read what the message says before correcting the error. The example from the “Hydro Inspection Form” is an alert relating to the Stage and ESG entries.

Date/Time: Date/time fields should always be entered in NZ daylight savings time. There is usually a NZST time displayed for your reference.

Repeats: These are sections that can be filled out multiple times. To add another entry, tap the “+” button at the bottom of the ‘repeat’. These can be added as many times as necessary. In the “Hydro Inspection Form” pictured the ‘Water Level Photos’ section is a ‘repeat’ section.

Relevant Sections: Some sections/fields are only visible based on the selection of other fields. This is normal and is a means of saving space in potentially very long survey forms. If you cannot find the

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section you are looking for, it could be that an earlier question is preventing it from displaying and needs to be corrected.

Field Constraints: Some fields will expect certain results and will not accept entries outside a particular range. Constraints reduce errors by preventing the form being submitted while an error remains. They are highlighted at the time of submission to making them easy to correct. In the unlikely event that you need to enter a number outside of the expected range of the developer, you will have to note this in the comments section and remove it from the constrained field to be able to submit the form.

Minimised Sections: Some sections are only filled out occasionally. These will usually be minimised to save space on the form. To expand the section, tap the Section Title.

SUBMITTING SURVEYS:

Submitting surveys requires a strong cellular connection. At least 2 stable bars of 4G coverage is recommended. Try not to submit surveys while driving as a fluctuating cellular connection can make the Application freeze.

Once a Survey is completed and ready to submit, tap the “☑” button in the bottom right corner. A popup window will appear giving you the following options:

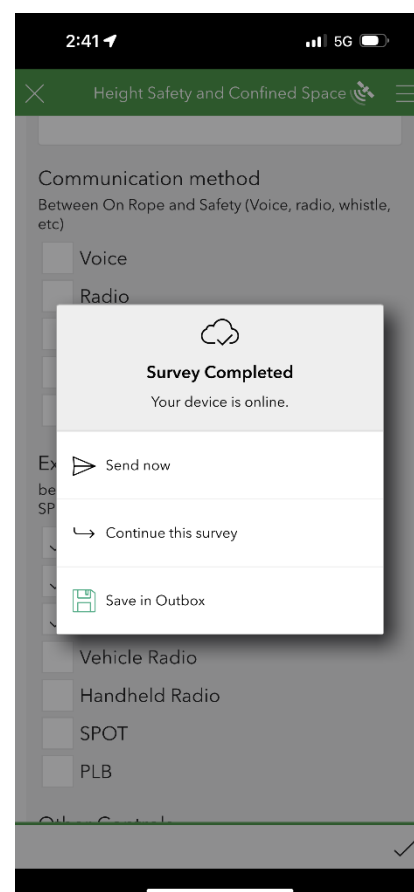
- Send now
- Continue this survey
- Save to Outbox

Send now: If you are in strong cell coverage, are 100% sure you have fully completed the form and will not need to reference this form again later in the day. The form will try to send immediately.

Continue this survey: Simply takes you back to the survey to make any adjustments.

Save to Outbox: Saves completed surveys to an outbox that can be collectively sent later in the day. For most forms it will be best to save to the outbox during the day and then send them all together later. Outbox surveys can be edited at will as the data has not left your device it won't affect any other processes.

To send surveys saved to the outbox, just tap the required form, tap the “outbox” option near the bottom of the page and then tap “send”. All forms in the outbox will send, there is no option to send a selection of surveys, but not all.



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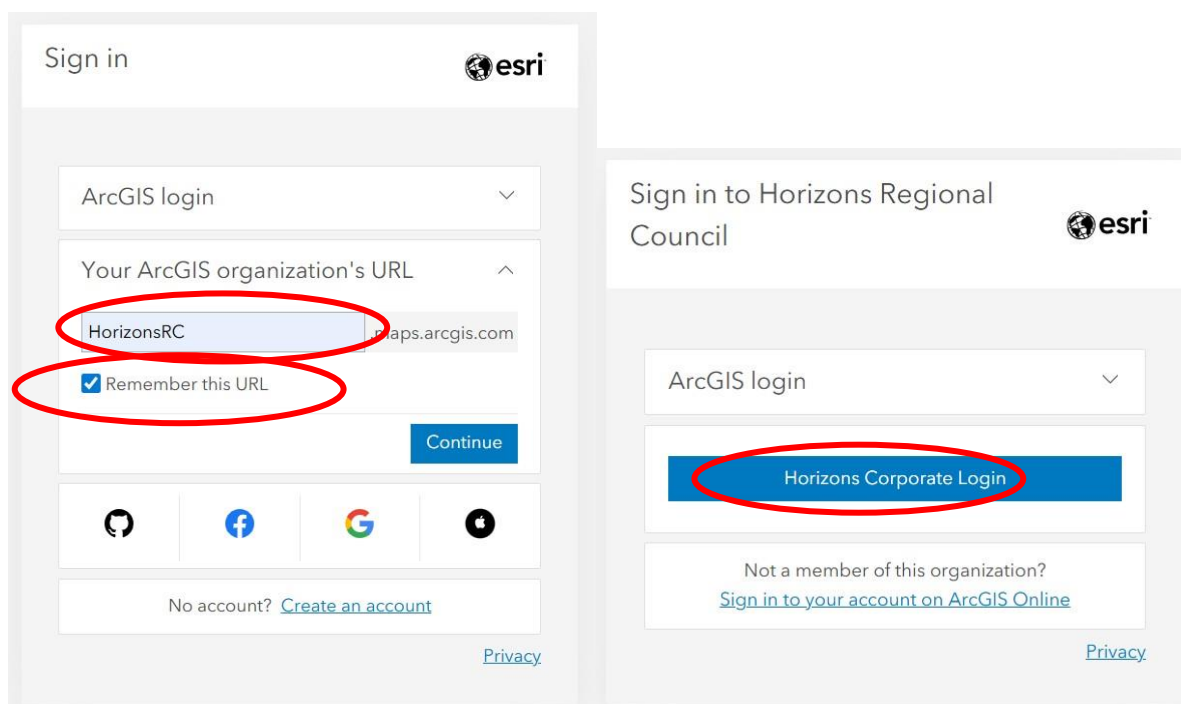
EDITING SUBMITTED SURVEYS:

In short: Don't. If you have made an error on a survey that is already submitted, contact the Data Team before making any changes. There are processes happening in the background that your edits could break.

VIEWING SUBMITTED DATA ON AGOL (ArcGIS Online):

In your web browser go to "Survey123.arcgis.com" and click 'sign in'. On the 'sign in' page type "HorizonsRC" in the box under "Your ArcGIS organization's URL". Tick the "Remember this URL" box to make things faster next time.

On the next screen click the "Horizons Corporate Login" button then sign in using your normal Horizons username and password.

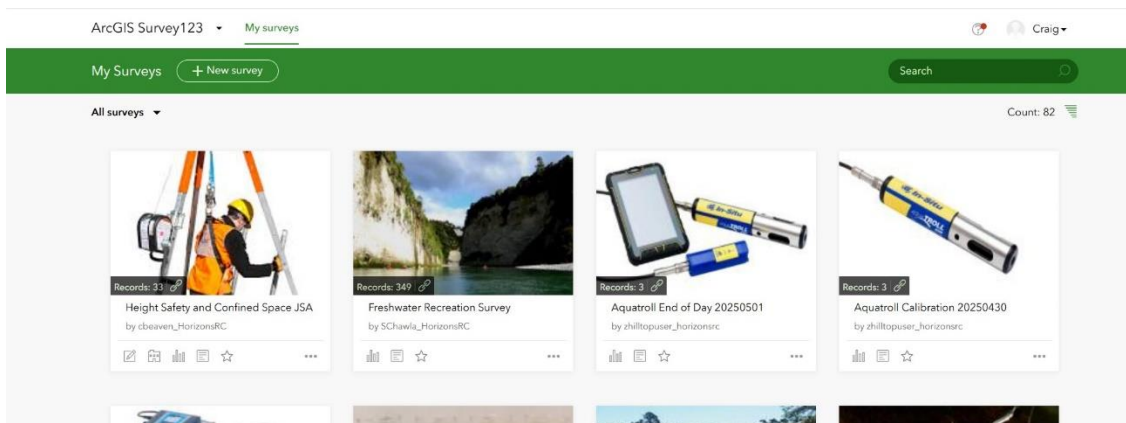


The image displays two screenshots of the ArcGIS Online sign-in process. The left screenshot shows the 'Sign in' page with the 'ArcGIS login' dropdown menu open. The 'Your ArcGIS organization's URL' field contains 'HorizonsRC' and the 'Remember this URL' checkbox is checked. The right screenshot shows the 'Sign in to Horizons Regional Council' page with the 'Horizons Corporate Login' button highlighted.

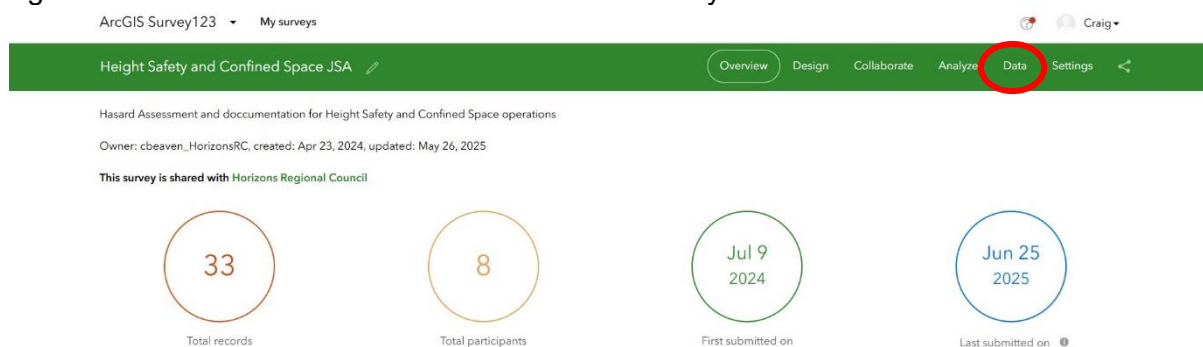
This will land you on the "My Surveys" page, which displays all the surveys that are available for you to view. Note: Surveys are displayed in order in which they were created and includes old versions of surveys that may not be current.

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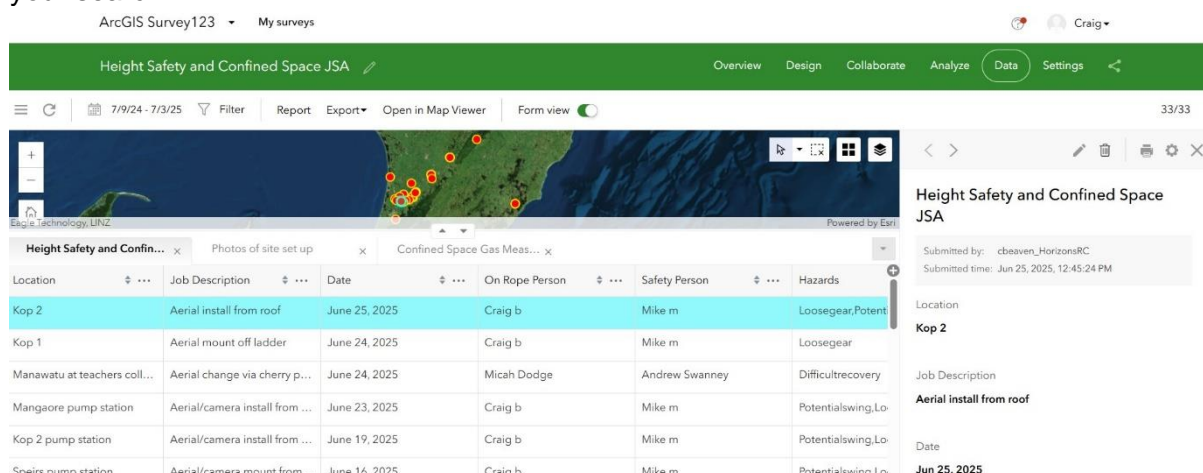
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Find the survey you are interested in and click on the picture to view more information about that survey. On the green banner click on “Data” to view individual survey entries.



In the data view each row of the table is a completed survey. Clicking on a line will highlight it and open an inset window displaying all the entries in that survey. You can also use the Filter function to narrow down your search.



Reminder: Do not edit anything in this space without first talking to the Data Team.