

ArcGIS Survey123

Tricks of the Trade

Understanding Organizational Templates



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Plus, a special guest!





What's new in ArcGIS Survey123 (October 2022)

Announcements

October 26, 2022



Christie Roland
ismael

ArcGIS Survey123 brings together the power of forms and GIS. Use Survey123 to build anything from the simplest, to the most sophisticated form; share your forms over the web or the Survey123 mobile app. Collect the **where** of things and show your organization the value of visualizing and analyzing form data geographically.

In this blog, we will share some of the exciting new features in our October 2022 release. Start using these features today!

Read on to learn what's new:

- [Jumpstart form building with Survey123 templates](#)
- [Make your forms geographically smarter with layer queries](#)
- [Other highlights](#)



What are Survey123 organization templates?

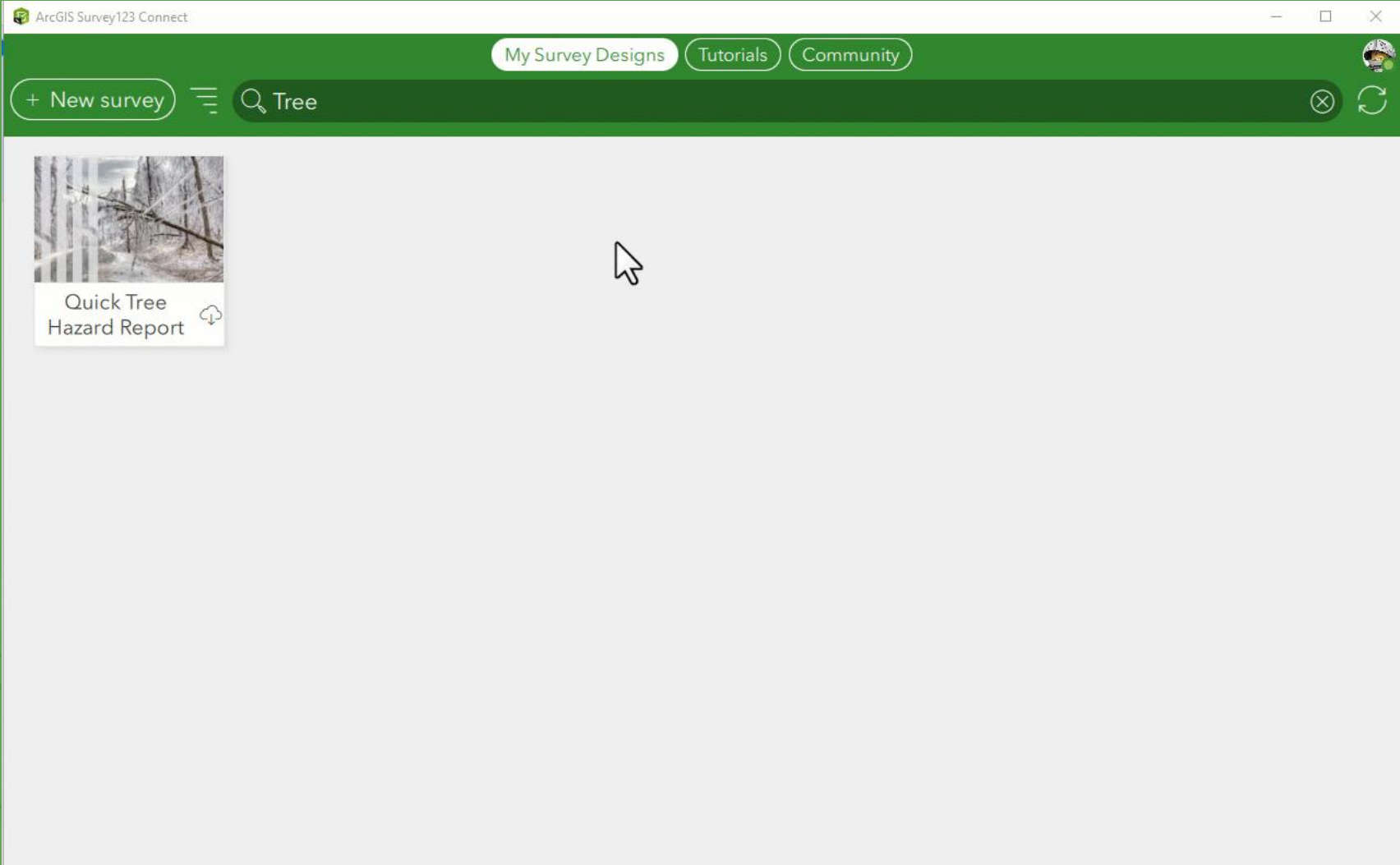
- A collection of survey designs that Survey123 authors can use as a starting point for their own work

What are Survey123 organization templates?

The screenshot displays the ArcGIS Survey123 interface. At the top, the navigation bar includes 'ArcGIS Survey123', 'My surveys', 'Organization', and 'Help'. The user profile 'Ismael' is visible in the top right. Below the navigation bar, the 'My Surveys' section features a '+ New survey' button and a search bar. The main content area is titled 'Surveys I own' and shows a grid of eight survey templates. Each template card includes a representative image, the number of records, the survey title, the creator's name, and a set of icons for editing, locking, viewing, and deleting.

Survey Title	Records	Creator
Hydrant Inspections	3,326	Ismael
Crop Scouting	0	Ismael
Redlands Parks Incident R...	1	Ismael
Quarterly Water Injection ...	0	Ismael
Well Stimulation Disclosure	0	Ismael
Operator Incident Report	0	Ismael
Redlands Parks Incident R...	0	Ismael
SCAT Survey	0	Ismael

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- Templates will help you:
 - Have people reuse common designs, so they do not have to start from scratch
 - Standardize the look and feel of surveys created in your organization
 - Reuse common data models
 - Show survey design best practices

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 - Show survey design best practices
- Both Survey123 Connect and the Survey123 web designer, make use of Survey123 organization templates

It's demo time!

Super-Popular Chinese Proverb



Example #1:

Quickly share templates with everyone in my organization.

Organization Templates



All organization members

Survey authors can see templates in Connect/web designer if:

1. The author has permission to view the organization template group.
2. The author has permission to view the survey form item.
3. The survey form item is added to the organization template group.

Example #2:

Share selected templates with entire organization and others with a specific group.

Organization Templates



Fire Department



Police Department



Public Works Department

Best practices and important considerations

- **Keep a good handle on who can share templates within your organization**
 - Configure your Survey123 design templates group so only trusted users can share new designs with it
- **Different people need different templates**
 - Some templates you will want to share with ALL survey authors in your org
 - Many others will be only available to certain groups
 - Leverage the ArcGIS sharing model to control who can see what templates
- **Take pride of your design templates**
 - Make them look nice (thumbnails, theme)
 - Add a description to the template
 - Share templates that inspire people
- **Survey123 designer and Connect**
 - If your survey design was authored in Connect, it will appear only to Connect authors
 - Survey123 web designer forms will appear in both Connect and the Designer template gallery

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> Understanding Survey123 organization templates

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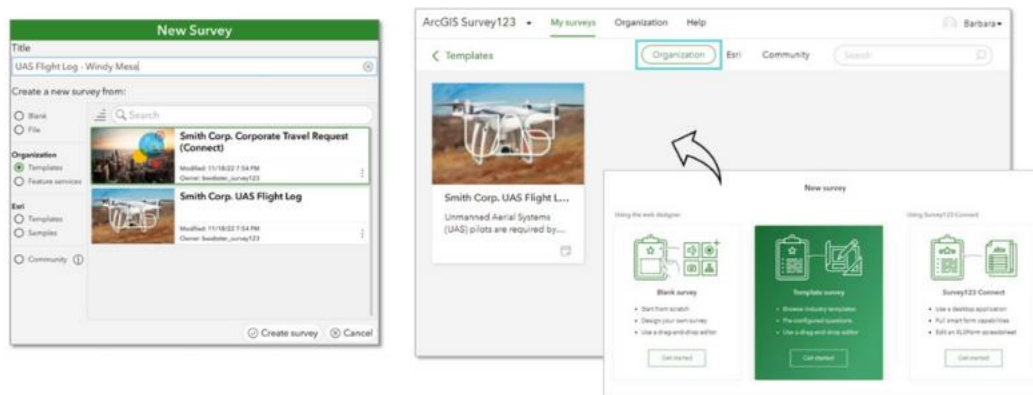
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by BarbaraWebster1 esri
Esri Contributor

Post Options

One of the new features included in the ArcGIS Survey123 October 2022 release (3.16) is the *Organization templates* setting. This option allows an organization administrator to share template surveys with other form authors in the organization. These templates appear in the *New Survey* dialog in Survey123 Connect or the Survey123 web designer.



Many organizations create the same kind of survey repeatedly, so using an organization template allows the survey author to quickly find and create the new survey and then make any further customizations that are needed.

Templates can also be used to model best practices in survey creation. Just as the *Esri samples* section demonstrate the capabilities and best practices for using various Survey123 features like appearances and

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Tell your story

- Inspire others with your survey designs
- Let us know why this work is meaningful
- Feature your template in the community
- Become a customer success story
- Submit your Form

The image is a collage of screenshots from the ArcGIS Survey123 website and community gallery. At the top, the 'ArcGIS Survey123' website header is visible, including navigation links like 'Overview', 'Gallery', 'Resources', 'Downloads', 'Sign In', and 'Pricing'. Below the header, the 'ArcGIS Survey123 Community Gallery' page is shown, featuring a green icon of a checklist and the text 'ArcGIS Survey123 Community Gallery Feature a form in ArcGIS Survey123' with a 'Submit your form' button. A green banner below this reads 'Get access to templates and share your forms' and includes a short paragraph about the community showcasing powerful, location-based data collection form templates. The middle section displays a 'Whale Sighting Report' form with fields for 'Date and time of sighting' (1/26/2023, 09:35 AM) and 'Sighting location' (a map interface). The bottom part shows a blog post titled 'NASA Harvest grows ground truth knowledge with ArcGIS Survey123' by Jacqui Newell, dated July 18, 2022, with the text 'Earth observation (EO) data is becoming increasingly important for monitoring and assessing the world we live in as typical data collection methods can often be costly and inaccessible. EO data is obtained remotely from'.

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Discover the latest news and trends in data collection

Every issue of What's New in ArcGIS Survey123 will show you how to solve problems and create powerful digital smart forms. We'll keep you updated on the latest features and best practices to help you collect data confidently and accurately. The newsletter will also include product news, tips, blogs, and information on webinars.

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Q & A
Thank you!