

# Guide to Implementing the Source Control Inspection Form Template

## What is the inspection form template?

The Source Control Inspection Form template developed as part of the supplemental resources for [Chapter 5 of the Source Control \(Business/Site\) Inspection Program Guidance Manual](#) is an XLSForm configured in ESRI's *Survey123 Connect* desktop application. The Microsoft Excel template contains the raw structure of an electronic survey (inspection form) that can be launched online for mobile application usage with Survey123.

## How is the inspection form template organized?

Two tabs in the Microsoft Excel template contain a majority of the inspection form structure:

- The **survey** tab configures database fields and visible survey questions with associated settings (e.g., type, defaults, formatting, cascading logic, etc.).
- The **choices** tab lists drop-down question choices associated with multiple choice questions.

The inspection form includes two primary sections:

- The **Inventory** section of the inspection form could be filled out in advance of the inspection or could be configured to pre-populate based on available data (refer to the "Inbox" feature of Survey123 for more information).
- The **Inspection** section of the inspection form is designed to be filled out during the site inspection/walk-through. Questions are grouped together by topic, and groups can be collapsed in the mobile application for simplified viewing and quicker navigation.

## How do I use the template?

GIS staff or IT support is recommended to implement the template, but not required. Survey123 Connect is free to download and can be used with an ESRI ArcGIS Online login. Jurisdictions that already have ArcGIS Online accounts should be able to access Survey123 with their existing login(s).

Basic steps for using the inspection form include:

1. Download the *Source Control Inspection Form Template* file
2. Download and install ESRI's [Survey123 Connect](#) for ArcGIS desktop application
3. Launch Survey123 Connect for ArcGIS and log in using your organization's ArcGIS Online (AGOL) credentials
4. Select **New Survey**
5. Add a preferred name for the survey to replace the default "Form 1" title (see screenshot on next page)

- When prompted to "Select an initial XLSForm design," select the **File** radio button (see screenshot below)
- Select the *Source Control Inspection Form Template* to import the file
- Select **Create Survey** to launch the survey
- If edits are desired (see "How can I customize the template?" on the next page), revisions can be made in the XLSForm and checked in the live survey preview
- Publish the survey to launch for field data collection
- Configure access permissions and sharing settings in Survey123 online browser interface
- Download the Survey123 mobile application on a smartphone or mobile device to view the inspection form (survey)

New Survey - ArcGIS Survey123 Connect ×

## New Survey

Title


Form 1×

Table name will be: **Form\_1**

Select an initial XLSForm design

- Templates
- Samples
- Community
- My surveys
- My organization
- Feature service
- File

☰




### Advanced Template

This template includes all XLSForm features supported in ArcGIS Survey123.

Modified: Tuesday, June 21, 2022 5:04:01 PM Pacific Daylight Time

Type: XLSForm

Owner: ArcGIS\_Survey123



### Standard Template

This template includes only those features that are supported in both the ArcGIS Survey123 field app and web app.

Modified: Thursday, June 23, 2022 12:08:54 AM Pacific Daylight Time

Type: XLSForm

Owner: ArcGIS\_Survey123

KW Katie Wingrove

✔ Create survey✕ Cancel

### *How can I customize the template and workflow?*

Jurisdictions can alter the *Source Control Inspection Form Template* as needed to suit local procedures. Because the inspection form was produced using Survey123 Connect, the form structure cannot be edited in the online Survey123 drag-and-drop interface. However, the .xlsx files can be modified using the Survey123 Connect for ArcGIS desktop application. To edit a checklist, open the Survey123 Connect for ArcGIS desktop application, launch the checklist, and open the XLSForm.

*Note: The Survey123 application is frequently updated by ESRI. Functionality described in this guide is subject to change.*

Users can edit language, add/remove questions, adjust multiple choice responses, etc. ESRI currently provides resources on their website under "[XLSForm Essentials](#)" to help new users understand editing procedures and other advanced features that users might like to incorporate, such as cascading or external selects, built-in formulas, etc.

Jurisdictions may prefer to split the **Inventory** section of the inspection form from the **Inspection** section. The inspection form can also be split into multiple surveys. Another option is to configure the **Inspection** section as a "Repeat" section to allow multiple surveys to be attached to the primary record.

After data collection, users can choose a preferred data export format from the "Data" tab in the Survey123 online interface, including CSV, Excel, shapefile, file geodatabase, etc. Survey data can also be exported in batch to a Word document template using the Survey123 "Report" function. For more information on generating reports from collected data, see the "[Report templates](#)" content on ESRI's website.

In addition to options for exporting data, there are strategies available to further streamline the inspection process by pre-populating data. ESRI has detailed information available for using default answers, calculations, and working with external content (such as a CSV file) that can be loaded onto the mobile device and used to pre-populate information. This may prove especially useful for speeding up data entry in the **Inventory** section of the inspection form. Jurisdictions are encouraged to use and adapt the inspection form features to best suit local procedures and practices for streamlined, consistent inspection documentation.

For more information on prepopulating answers and working with external content, see the "[Prepopulate answers](#)" content on ESRI's website.

Non-ESRI users can also adapt the provided survey content to other formats including Microsoft Word, editable PDF files, or other electronic data collection software.