INSTRUCTIONS FOR EPA SANITARY SURVEY APP FOR MARINE AND FRESH WATERS

Revised October 2020



This Document Provides Instruction For:

Requesting Credentials to the EPA Sanitary Survey App for Marine and Fresh Waters

• Request Access Credentials (Username and Password) [jump to section]

Accessing the Survey123 Application

- Option A. Instructions for downloading the Survey123 app on your <u>smart phone or tablet</u> [jump to section]
- Option B. Instructions for downloading the Survey123 app to your <u>computer or web</u> <u>browser [jump to section]</u>

Steps for Downloading and Using the Sanitary Surveys in Survey123

- 1. Instructions for downloading the sanitary surveys in the app [jump to section]
- 2. Tips on completing the survey [jump to section]
- 3. Instructions for submitting and saving sanitary surveys [jump to section]

Viewing and Exporting Your Sanitary Survey Data

- Option A. Retrieving data using EPA's ESRI GeoPlatform [jump to section]
- Option B. Retrieving data using <u>Survey123 website</u> [jump to section]

REQUESTING CREDENTIALS TO THE EPA SANITARY SURVEY APP

Request Access Credentials (Username and Password)

Before you can access the EPA Sanitary Survey App for Marine and Fresh Waters you will need to request a username and password from EPA. Go to https://request.ercloud.org/requestaccount to request your credentials using the GeoPlatform User Account Request Form (Figure 1). All fields on the form will need to be completed and click the box "I'm not a robot". For the **Response/Project**, select **Freshwater and Marine Sanitary Survey**.

At time of account creation, your account will be set to a General User which only has permission to submit, view, edit and download your own data.



Figure 1. Sanitary Surveys GeoPlatform User Account Request Form

After the **GeoPlatform User Account Request Form** is submitted, you will receive a username and temporary password within 48 hours. Your access credentials will allow you to access the surveys using Survey123 on your smartphone and computer as well as download your data from EPA's Geo-Platform (see detailed instructions on the following pages).

- <u>External users</u> (i.e., non-EPA), when you sign into the ArcGIS Online (see <u>Step A.2a</u>), you will be prompted to change your password.
- <u>EPA user</u> accounts will be linked to their LAN User ID after requesting access to the App. Follow the instructions in <u>Step A.2b</u> to login into ArcGIS Online.

Accessing the Survey 123 Application

This section contains instructions for accessing the EPA Sanitary Survey App for Marine and Fresh Waters using the Survey 123 app on a mobile device (e.g., phone, tablet) and a web browser. The Survey123 app and the EPA Sanitary Survey App should be downloaded before going into the field. By downloading the surveys in advance, you will be able to access and complete them without the need for WiFi or an Internet connection.

Important

If there is no WiFi or Internet connection in the field, download the surveys before going into the field to conduct the sanitary survey.

Option A: Instructions for Downloading the Survey123 App on Your Smart Phone or Tablet

Step A.1: Download Survey123 Application to Use the EPA Sanitary Surveys for Marine and Fresh Waters

Download and install the Survey123 application (Figure 2) onto your mobile device via the <u>Google Play</u> Store or <u>Apple app store</u>.



Figure 2. Icon for Survey123

Step A.2a. Sign in to Survey123 for External Users

(1) Enter the username and temporary password provided to sign in to ArcGIS Online (Figure 3). Note that the extension "EPAEXT" in the username is not case sensitive.

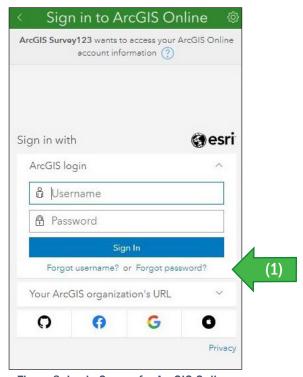


Figure 3. Login Screen for ArcGIS Online



(2) Once you have logged in for the first time, you will be prompted to change your password (Figure 4). Enter the old password and then a new password and re-enter new password in Confirm password following the password tips provided.

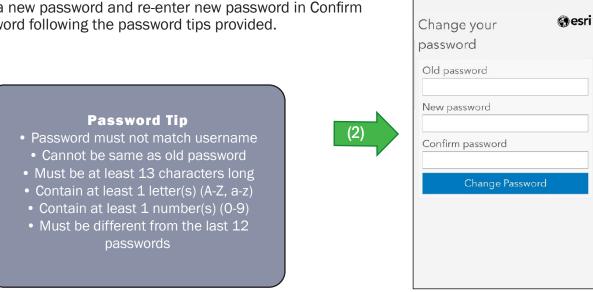


Figure 4. Password change screen

(3) You will then be prompted to enter a security question (Figure 5). Once you've completed this step you will see the My Survey 123 home screen and you can begin downloading the surveys by following the steps for downloading and using the sanitary surveys.

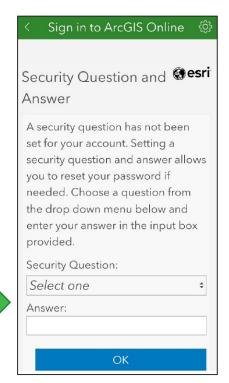


Figure 5. Security question screen

Note

If you are unable to access the surveys, please contact EPA_SanitarySurveyApp@epa.gov.

A.2b. Sign in to Survey123 for EPA Users

- (1) Select Your ArcGIS organization's URL (Figure 6)
- (2) Type in "EPA" (not case sensitive) as the organization and select Continue (Figure 7).
- (3) You will then be redirected to a second screen (Figure 8). Select EPA Enterprise again.
- (4) Enter your EPA LAN User ID and Password or use your PIV card PIN (computer) to log in (Figure 9).

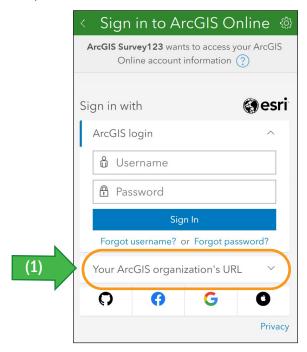


Figure 6. EPA user login in

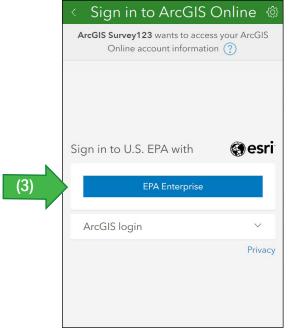


Figure 8. Select EPA Enterprise

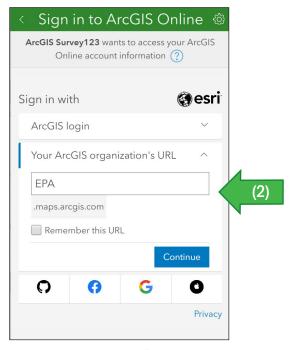


Figure 7. Enter "EPA"

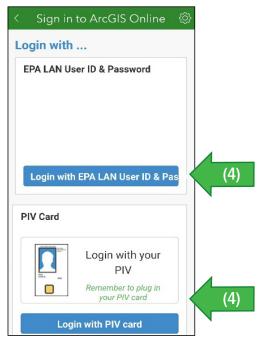


Figure 9. Enter your LAN username and password or log in with your PIV card



Option B: Instructions for Using Your Computer or Web Browser

Step B.1. To access go to: https://epa.maps.arcgis.com/home/index.html. Then click on the **Sign In** button on the top right corner (Figure 10).



Figure 10. GeoPlatform main screen

Step B.2. To sign in, <u>external users</u> will need to follow **Step A.2a**, while <u>EPA users</u> will need to follow **Step A.2b**. These steps are on pages 3 - 5 (Figure 11).



Figure 11. Sign in window

Step B.3: Select **Groups** on the main menu (Figure 12).



Figure 12. GeoPlatform main menu after logging in



Step B.4. Select the **Group Freshwater and Marine Sanitary Surveys – General Users** (Figure 13). In the **Recently added content** (Figure 14) you can view some of the surveys. Select **View All Group Content** at the top of the icons (shown in Figure 14) or at the bottom of the page to see all of the surveys.



Figure 13. Freshwater and Marine Sanitary Surveys -- General User-Group

You will find four types of files in this folder for each of the sanitary surveys: a **Web Map**, a **Form**, and two **Feature Layers**. You can hover over the icon to see the name of the file type. Web Maps and Feature layers are part of each survey form and the Form pulls data from each of these files.

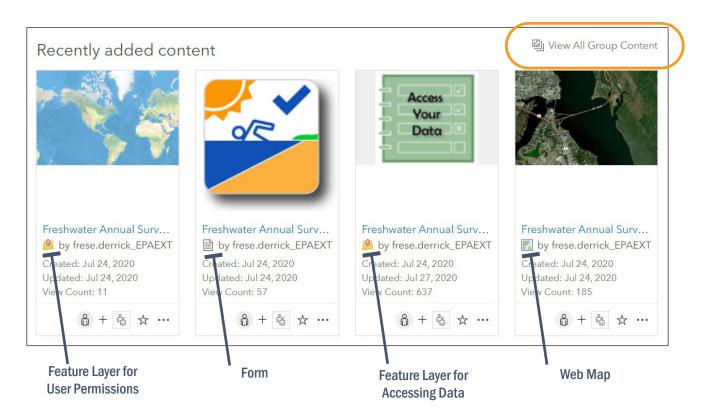


Figure 14. Sanitary survey files types on the EPA GeoPlatform

Step B.5. Select only the Form (i.e., with the swimmer pictogram or paper icon in Figure 14) by clicking on the name of the survey form (e.g., Marine Sanitary Survey). Once the form opens, you can choose to either open the survey in the browser or in the Survey123 app. Click on Open in Survey123 drop-down menu, and then select Open in browser or Open in Survey123 app (Figure 15). If you select the Open in Survey123 app, you will be redirected to a download page.

Note

After clicking on the survey form, the name listed here will not be yours but rather the name of the developer.

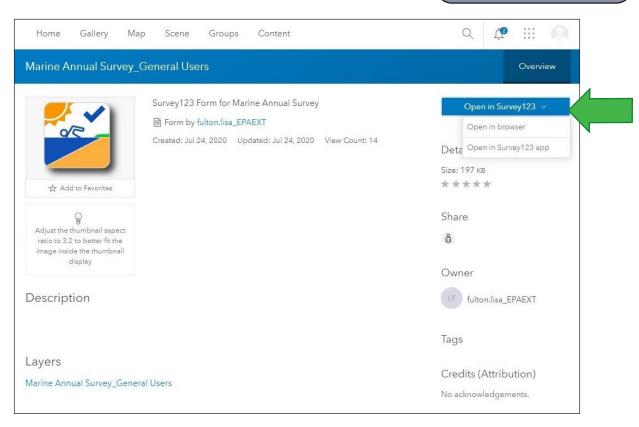


Figure 15. Opening Survey123 from your browser

Step B.6. Click **Download** to download the Survey123 app. You will be redirected again to the ArcGIS Survey123 Resource Page. Scroll to the end of the page and download the appropriate ArcGIS Survey123 field app for your processing system (Figure 16).

Step B.7. Once you've downloaded the Survey123 app on your computer, follow the steps for downloading and using the sanitary surveys on pages 3 - 5. External users will need to follow **Step A.2a**, while EPA users will need to follow **Step A.2b** to sign in.

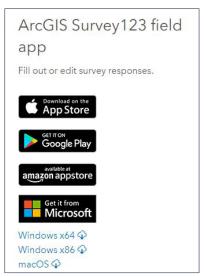


Figure 16. Download for your processing system

Steps for Downloading and Using the Sanitary Survey

1. Instructions for Downloading the Survey in the App

Step 1: Download EPA Sanitary Surveys in Survey123

As a first-time user of the App, once you log into the Survey 123 app with your credentials, you should see an image like Figure 17 that says, "Looks like you don't have any surveys on your device." Select Download Surveys. Then go to Step 2a. If you had previously downloaded surveys as an alpha or beta tester or if a new version of the survey is released, you will need to update your surveys to the latest versions (see Step 2b).

Step 2a: Downloading Surveys for First Time

Select the sanitary survey(s) you wish to download to your device:

- Marine Routine Survey
- Marine Annual Survey
- Freshwater Routine Survey
- Freshwater Annual Survey

There may be a slight delay in seeing the surveys because they are loading. Downloads occur one at a time by selecting each download icon part to each survey. After downloading the surveys for the first time, go to Tips on Completing the Survey (page 11) or Instructions for Submitting and Saving Sanitary Survey Data (page 13).

Step 2b: Downloading Newer Versions of Surveys

If you were a volunteer tester of the alpha and beta versions of the EPA sanitary surveys and these surveys are still on your My Surveys page of Survey123, you will need to download the latest versions of the surveys before you can begin using them. When downloaded, newer versions of the surveys will appear on your My Surveys page as new surveys and will not replace the old surveys on your device. Follow these instructions when downloading newer versions.

Delete old surveys first: It is recommended that you delete the old surveys before downloading new, updated surveys. There isn't a batch process to delete all old surveys at once, so each old survey will have to be deleted individually. To delete old surveys, open each survey by clicking on the survey icon; and then click on the triple horizontal bars on the upper right-hand corner (Figure 18); and then click Delete Survey. Make sure you do it for each survey.



Figure 17. Download surveys in Survey123

Tip

Delete old surveys before downloading new, updated surveys. See Step 2.b for help.



Figure 18. How to delete surveys

If old surveys aren't deleted, multiple versions will appear on your **My Surveys** page, making it difficult to determine the latest version without opening each survey. **Additionally, if you use an older version of the surveys, you may not find your data.**



After deleting all old surveys, you can proceed with downloading the newer versions. You may see on your **My Surveys** screen notification that there are updates available (Figure 19).



Figure 19. Updates available notification

To download the latest versions, begin by selecting the Person icon in Figure 19 or your initials (this is the icon to the right of icon on the top right of the page).

Click \bigcirc Download Surveys to download the survey. A list of surveys to be updated will appear. If the survey needs to be updated, it will have a cloud icon \bigcirc next to it. Click the cloud icon next to each survey.

From time to time, based on user feedback and enhancements, the surveys will be updated. EPA will notify users when newer versions of the surveys have been released, so users can ensure they are using the latest versions. These instructions can be used to download newer versions of the surveys.

Return to My Surveys by selecting the back arrow.

Step 4: Opening the Survey

Select the survey you plan to complete by clicking on the survey icon (e.g., the marine annual survey

has this icon).

Marine Annual Survey_General ...

Click the **Collect** button at the bottom of the screen to open the survey to begin entering your sanitary survey data.



Give Survey123 permission to access your location or camera data to allow for full application functionality.

Step 5: Begin Collecting Data

Begin entering data. Use the navigation arrow buttons at the bottom of the screen (Figure 20) to navigate through the survey pages.

Navigation arrow button

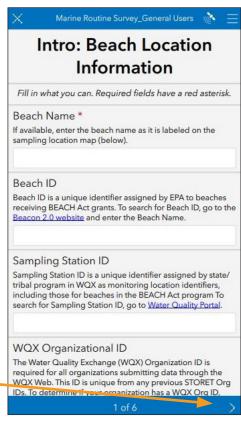


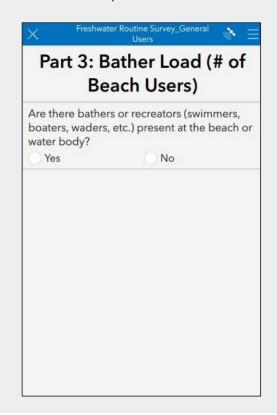
Figure 20. Freshwater Routine Sanitary Survey - Page 1

2. Tips on Completing the Survey

Survey Features

While several questions at the beginning of the survey are required (as indicated by a red asterisk, *) the bulk of the survey questions are optional. As you enter the data, you will see the following features: embedded questions when entering certain responses; questions with repeats that allow you to enter data for up to 10 entries; sections that collapse to hide information and reduce length of survey; and sections for taking (multiple) photos. See the screenshots to learn more about these features.

Embedded questions that appear when you select Yes for certain responses (e.g., Observed, etc.) in certain sections of the surveys. Below is an example of how **Part 3: Bather Load** expands to show embedded questions after selecting "Yes."

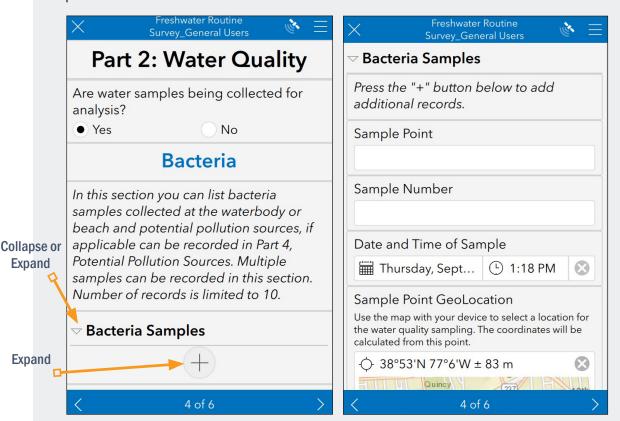


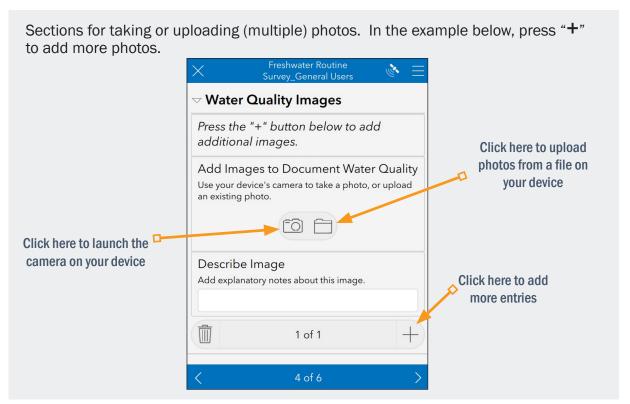


Questions with repeats that allow you to enter data for up to 10 entries. In the example below, press "+" to add more entries



Sections that collapse to hide information and reduce length of survey. In the example below, pressing the arrow on the top left will collapse the list of activities and "+" to expand the section.





3. Instructions for Submitting and Saving Sanitary Survey Data

Submitting the Survey

Step 1. Once you've completed the survey, use the check button at the end of the survey to validate the submission (Figure 21). Once the app checks that all the required fields are filled in, the survey will be considered complete and ready to be submitted to the EPA GeoPlatform.

If you don't click the check button, your work will not be saved.

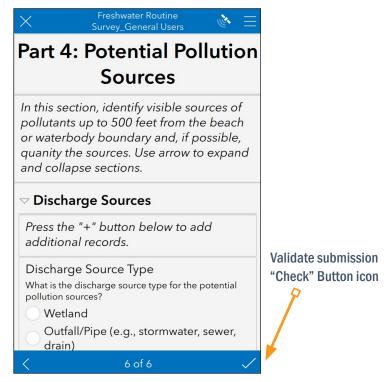


Figure 21. Freshwater Routine Sanitary Survey
- Page 6

Step 2. The Survey Completed window (Figure 22) will appear with three choices – Send now; Continue this survey; or Save this survey in the Outbox.

- Send now: This will upload your data to the EPA GeoPlatform if you have WiFi or Internet access. Once your data is on the GeoPlatform you can view and download.
- Save this survey in the Outbox: This will save your survey to the Outbox folder on the introduction screen for the survey below the Collect button. This is a great option if your device is offline or you have no WiFi or Internet access,
 - » Once you have reconnected to WiFi or the Internet, return to the saved survey in the **Outbox** to submit your survey to the EPA GeoPlatform.

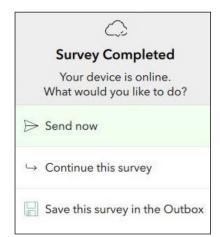


Figure 22. Survey completed screen

All surveys sent to the EPA GeoPlatform are saved to a **Sent** folder on the introduction screen for the survey below the **Collect** button (Figure 26). These surveys can be edited and resubmitted or data can be copied to a new survey (Figure 23). An edited and resubmitted survey will replace the previously submitted data. Surveys submitted can also be viewed in the **Inbox** (Figure 26). Select **Inbox** and then **Refresh** to load the surveys you have submitted.



Figure 23. Edit or resubmit survey

Closing and Returning to your survey at a later time

Close button

Tip

Unable to complete

a survey? That's OK

By clicking the close button in the top left-hand corner (Figure 24), you will be prompted to Save the Survey in the **Drafts** (Figure 25). The draft survey will be saved in a Draft folder on the intro screen for that survey below the Collect button (Figure 26). To edit or complete the draft survey, reopen the same survey form again, select the **Drafts** folder and find the draft survey file you want to complete. Begin adding additional information to complete the survey.

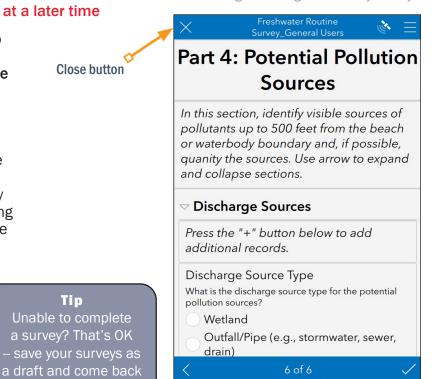


Figure 24. Freshwater Routine Sanitary Survey - Page 6

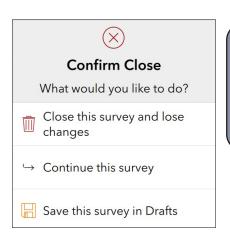


Figure 25. Saving the survey as a draft

Survey Homepage

Based on your selection in the previous steps, the intro page for your survey may look like Figure 26.

- The Collect button will start a new survey
- The Inbox and Drafts buttons store surveys that have been started but not yet submitted.
- The Sent button stores all surveys that have been sent. Here you can edit and resubmit or copy surveys as discussed on page 13 and 14.

The little notification numbers will update to match the number of surveys you have submitted and drafts that you have saved

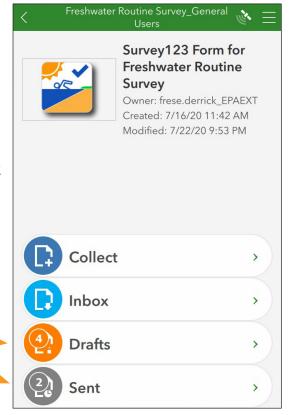


Figure 26. Freshwater Routine Survey intro page

VIEWING AND EXPORTING YOUR SANITARY SURVEY DATA

It is best to view and download your data from a computer rather than your smart phone. There are two platforms which may be used to view and download your data (Option A being the EPA ESRI GeoPlatform_[jump to section] and Option B being the Survey123 website [jump to section]). These two options are discussed in this section. The best way to view your data is in Survey123 for ArcGIS.

Tip

Survey 123 for ArcGIS is the best way to view your data and photos. Use your computer not your smartphone to view and download data.

Option A: Retrieving Data Using EPA's ESRI GeoPlatform

Step A.1: Sign into EPA's ESRI GeoPlatform

- Open a web browser and navigate to the EPA's ESRI GeoPlatform
 - » https://epa.maps.arcgis.com/home/index.html
- Log in with your username and password

Step A.2: Find your data

- After logging in, click on the Groups on the main menu (Figure 20).
- Select "Freshwater and Marine Sanitary Surveys General User" (Figure 21).

In the "Freshwater and Marine Sanitary Surveys – General User", you will see Web Maps, Forms and Feature Layer files (see Step 3.4) for each survey. The data you submitted is stored in the Feature Layer called "Access Your Data" for each respective survey (Figure 27).

Step A.3: Access your data

Click on the **Feature Layer** called "**Access Your Data**" for the survey for which data was collected (Figure 27).

This will open the **Access Your Data** Figure 28 on page 16. From here, you can choose to view and/or export your data.

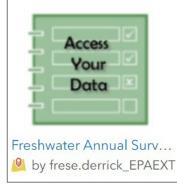


Figure 27. Access data icon

Step A.4. View your data

Once you open Access Your Data (Figure 28), you can view your data several ways:

- Using the Data tab to view data in tabular format (Figure 29). This is the best option for viewing your data and photos.
- Using the **Visualization** tab to view data spatially (Figure 30).
- Using the Map Viewer to view data in tabular and map forms (Figure 31).

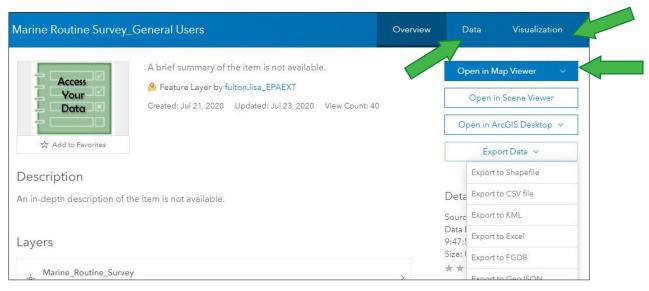


Figure 28. View data submitted to the GeoPlatform

TipThe **data** tab is the best option for viewing your data and photos on the GeoPlatform

View your data using the Data tab

Figure 29 shows data for surveys conducted using the **Data** tab. Use the scroll bars at the bottom of the table to navigate through the various sections of the survey (from left to right). You may also use the drop-down menu to view specific sections of the survey.

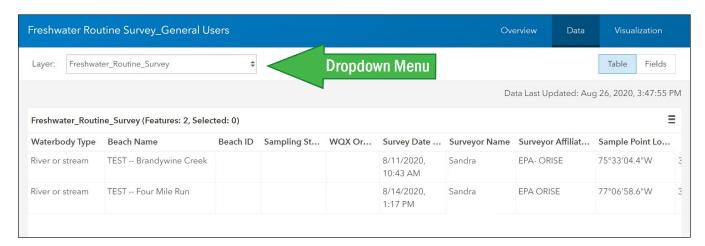


Figure 29. Data display from the data tab

View your data using the Visualization tab

Figure 30 shows the data displayed spatially using the Visualization tab. When viewing data using Visualization, you may need to adjust the map (i.e., zoom in or out) to see your data point(s) on the map. Click on a data point to view the data collected.

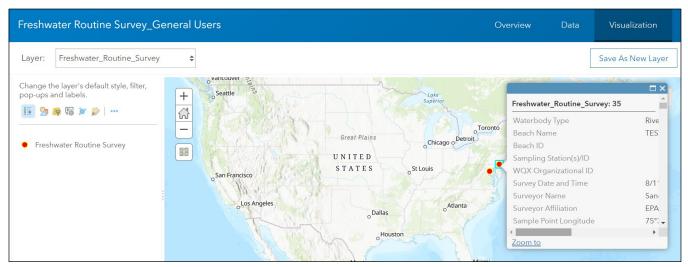
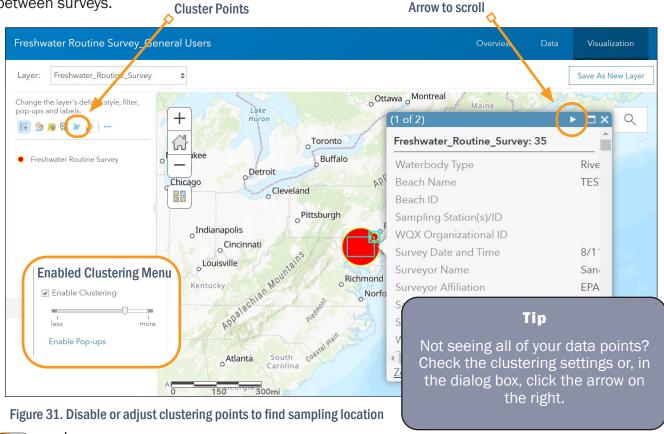


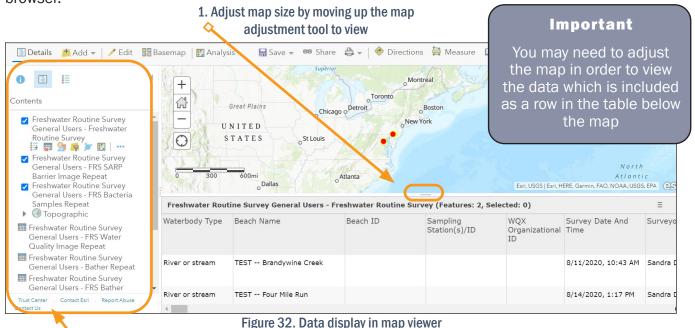
Figure 30. Data viewed using the visualization tab

When there are many points in the same area of the map, you may need to disable or adjust the clustering in order to find your data. To do so, click on the Cluster Points icon shown in Figure 31 and the Enable Clustering menu will appear. You can also see how to scroll between multiple sample points that are clustered closely together (the red dot may represent multiple data points). To see the clustered data points, click the small arrow on the top right corner of the data box to scroll between surveys.



View your data using the Map Viewer

Figure 32 shows data viewed using **Map Viewer**. Use the menu on the left-hand side to view the data for different parts of the survey. To see and toggle between tables in the **Map Viewer**, select the section of the survey you would like to see, then click the chart icon \blacksquare . You can also click on a data point on the map to view your data. To leave the map viewer, click the back button on your browser.



2. View different parts of the survey by using this menu

Step A.5. Exporting your data

To download your data, click **Export Data**. All layers and tables will be exported as one zip file, or as individual layers/tables (Figure 33).

1. Export all data as a .zip file

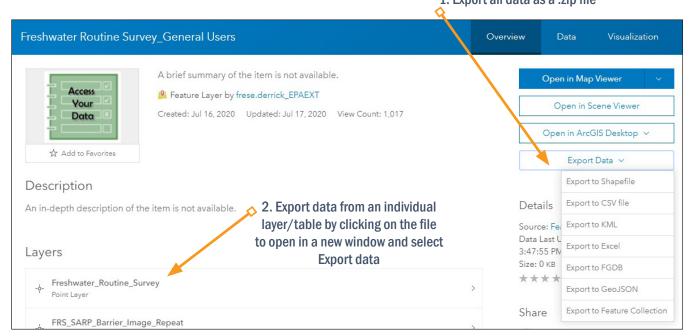
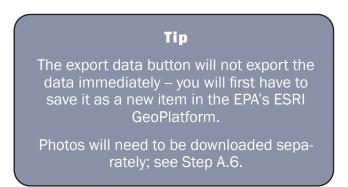


Figure 33. Options for exporting data from the GeoPlatform

When you choose to export data, it will not be exported immediately. Instead, you will have to save it as a new item in the EPA's ESRI GeoPlatform. In this example, I have chosen to **Export to a CSV** file. You can provide your exported file a name, tags, etc. Click **Enter** to add one or more tags in order to activate the **Export** button. Add **Summary** (optional) and **Change Save in Folder** location. Click Export to create a new item in the EPA's GeoPlatform (Figure 34).



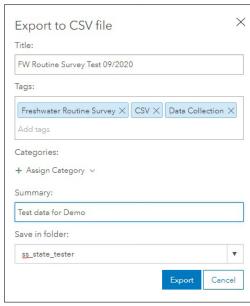
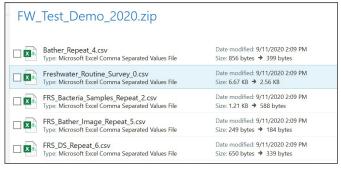


Figure 34. Exporting data from GeoPlatform

After exporting your new item, you will be routed to the new item's page in the GeoPlatform. You will see a **Download** button on the right-hand side of the page. Click **Download** to download the .zip file to your local workstation (Figure 35). See Figure 36 for an example of the data output files in the .zip file.



Figure 35. New items screen to download data



Note that if you need to find this file again, click on the **Content** tab at the top of the page after logging into the GeoPlatform. This will take you to your **Content** "home," where you will be able to view all content you own in the EPA's GeoPlatform.

Figure 36. Example exported data file

Step A.6. Download your Photos

To find, view, and save your survey photos, select the survey section where photos were taken or sections entitled "Image Repeat" from the dropdown menu (Figure 37) in the **Data** tab.

Find your photos in Image Repeat or in the sections of the survey where photos were taken

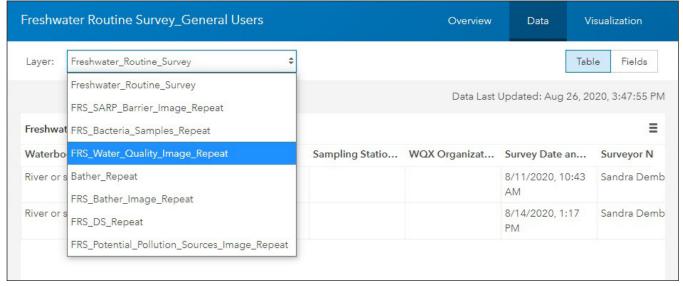


Figure 37. Finding your photos

You can view your photos by clicking on links under **Photos and Files** (Figure 38). This will open to the individual photo to allow you to view each photo. To save the photo, right click on the photo and then select **Save Image As** and specify where you would like the photo saved. This process will have to be repeated for each photo.

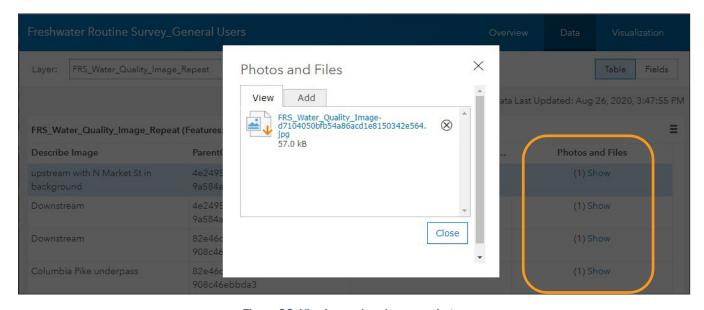


Figure 38. Viewing and saving your photos

click this Data icon.

Option B: Retrieving Data Using Survey123 Website

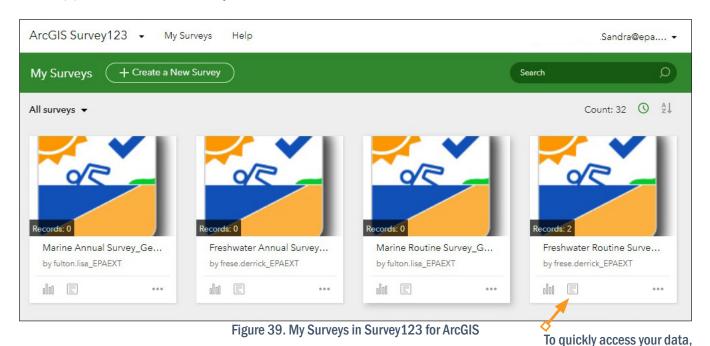
The Survey123 website is tied to GeoPlatform. They share users, groups, data, etc. The Survey123 website provides another option to view and export survey data collected with the EPA Sanitary Survey App for Marine and Fresh Waters.

Step B.1: Sign into the Survey123 website

- Open a web browser and navigate to the EPA's ESRI GeoPlatform
 - » https://survey123.arcgis.com/
- Log in with your username and password

Step B.2: View your data

Click on the **My Surveys** tab on the top of the page to view surveys for which you have access to view submitted data for in the Survey123 website (Figure 39). Surveys with data will appear with a record(s) number on the survey icon.



Once you click on the survey icon for which you submitted data (Figure 39), you can view your data several ways:

- The **Overview** tab provides high level information about the status of this survey such as summary information on the total number of surveys submitted, number of submitters, and the first and last date of data submission (Figure 40).
- The **Analyze** tab provides functionality to analyze the answers to individual survey questions. This feature is currently disabled.
- The Data tab provides a map and table view of the data you have submitted. You can
 filter the data, generate reports, etc... and export your data in several formats (Figures 41
 and 42).

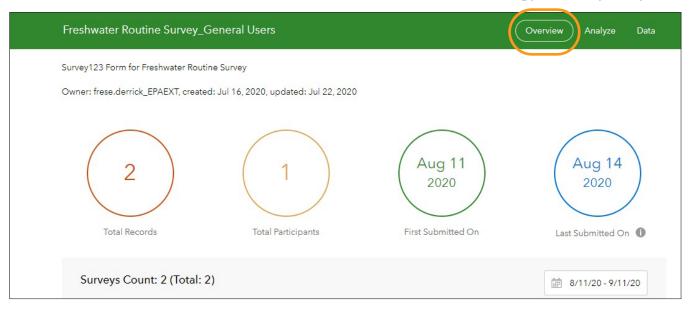


Figure 40. Overview tab Survey123 ArcGIS

View your data in the Data tab

Select **Data** (Figure 41). Note: If your survey data does not display as shown in Figure 41 you may need refresh your view (CTRL F5 [PC] or Command R [Mac]). In the data tab you can view you data in two ways:

(1) View your data in the table at the bottom of the window (Figure 41). You may need to adjust the table size by pulling the table tab up. Here you can toggle between data tables.

Tip

If you're having problems reviewing your data click CTRL F5 (PC) or Command R (Mac) to reload data screen.

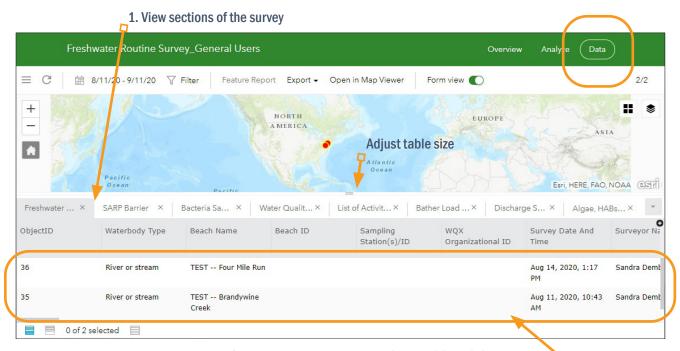


Figure 41. View the data in a table in Survey123 ArcGIS

Your survey data

Retrieving your Sanitary Survey Data

(2) View your data by clicking your sampling location point on the map (Figure 42). This will open a new window display to the right of the map where you can scroll through your data and photos as they appear in the

Click data points on your map to view data and photos in the side pane

Tip

2. View data in side display window

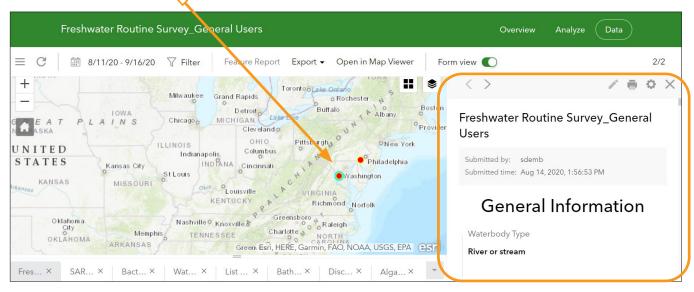


Figure 42. View the data and photos in the side window in Survey123 ArcGIS

Step B.3 Exporting Your Data

sanitary survey app.

To download survey data, on the **Data** tab, select **Export** in the toolbar above the map (Figure 43). Choose your preferred format for the export file. After some processing time, the file will download to your local workstation. Note: You can filter the results before exporting them. If you do this, the exported file will only contain the filtered data.

To download your photos, select your sampling location point on the map (Figure 43). Scroll through this window to view photos. Right click on photos and select **Save Image As** to save photos.

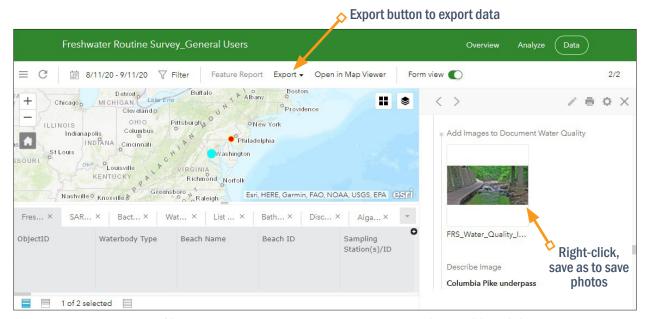


Figure 43. Exporting your data and saving your photos in Survey123 ArcGIS