

## Survey123 Regional Admin Forms and Capabilities

Regional Admins are provided three additional forms to perform basic admin functions that are not available to Basic Accounts. The forms and their capabilities are below. The form tiles shown are the 'Whidbey' versions. 'Whidbey' will be replaced by your Region name in your version of these forms. The view properties (file access) of the Colony Description form are still under development, but files can be uploaded without issue.

### PIGU Add Person Form:



Through the PIGU Add Person form you can:

- Add a new surveyor to your assigned Region.
  - This enables the person to fill out and submit the Survey123 Survey Form if the person has an AGOL account and has downloaded and installed the Survey123 Field App.
  - This adds the person to the Survey Form 'Team Lead' picklist.

It is not necessary for the surveyor to have an AGOL account or have installed Survey123 to be added via the PIGU Add Person form. If you want to add a person to the 'Team Lead' picklist, but that person will not be submitting Survey Forms, you can do this via the PIGU Add Person form.

When adding a person with an AGOL account ensure the following:

- Refresh and check the PIGU Add Person form Inbox to make sure the person has not been previously added. This can happen since most Regions have multiple Regional Admins, and full coordination is not always possible.
- For AGOL account holders, make sure you enter the exact same AGOL Username as the surveyor entered when setting up their AGOL account. AGOL usernames are case-sensitive.

Note: ***You cannot initiate a new account through this form.*** If the person you are adding will need an account, that person must already have been issued an invitation to join the ArcGIS community by WDFW, and they must have set up their ArcGIS account and downloaded and installed the Survey123 Field App.

### PIGU Add Colony Form:



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Through the PIGU Add Colony form, for any colony in your assigned Region, you may:

- Add/update the Location Note.
- Add/update the Other Note.
- Select the Colony to be shown, or not shown, in the Survey Form 'Colony' picklist.
- Upload current (or archived) survey year documents via a link to the Colony Description form.
- Access archived colony documents via a link (feature not yet added).

**To view or edit colony information:** Update your list of colonies using the Inbox 'Refresh' feature, and then use the Inbox search feature to find your colony. Note that there is no Collect option for this form, so it cannot be used to enter a new colony. Contact a Super Admin to enter a new colony.

**A Note about 'Notes':** Do not enter personally identifiable information (PII) in either of the 'Notes' fields; in particular do not enter information about private property owners. We do not yet have a policy or standard for how to use these notes, but for now any content in these notes is not available to the public.

**Using ShowInPicklist:** Typically, we want to show only the colonies we are surveying in the current season in the Survey Form 'Colony' picklist. Therefore, use this selection to deselect any colonies we will not be surveying. We can reselect any colony should it be surveyed again in the future. Note that the Inbox list of colonies shows for each colony whether or not it has been selected for the 'Colony' picklist. This allows you to filter by this selection to quickly see what colonies have been selected for the picklist.

### PIGU Colony Description Form:

**PIGU  
COLONY  
DESCRIPTION  
FINAL**

**Using the Colony Description form:** The Colony Description form is for archiving colony documents (drawings, photographs, and other documents) if that is something your Region does or decides to do. This feature was developed to hold colony "maps" showing burrow locations; providing a history of burrow use and bluff evolution. However, other documents can be uploaded via this tool. Allowable file types are JPEG, PNG, and PDF. Once you have linked to this form from the Add Colony form, select the relevant year for the documents. This will generally be the current survey year unless you are uploading archived documents. Use the file folder icon to upload documents stored on your device, or use the camera icon to take pictures of the documents using a connected camera. You may upload as many documents as are needed. Specific directions are below.

Upload documents through the Add Colony form by linking to the Colony Description form.

1. Open PIGU Add Colony Regional Admin form for your region.
2. Navigate to the inbox.
3. Click Refresh icon to ensure you have all records available.
4. Search for the Colony you wish to upload docs to and click on it.

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5. Click either View or Edit to open it.
6. Click the “Colony Description” link to open PIGU Colony Description form.
7. In the Colony Description form select the year the documents you want to upload are associated with (using + and – OR edit with keyboard)
8. Click the folder icon.
9. Navigate on your device to the files to upload.
10. Select/highlight a file. The default file type control may be set to images. So, you may need to select the “All files” control if you don’t see any files listed.
11. Click ‘Open’ and the file will load to the Colony Description form.
12. Click the elipsis in the Colony Description form (next to the trash can) to bring up a menu and select Rename (only for Whidbey users uploading colony maps).
13. Highlight the auto-generated name and replace with our coded name (only for Whidbey users uploading colony maps).
14. Hit Return (only for Whidbey users uploading colony maps).
15. Rerun steps 8-13 for each document **for the selected survey year** for this colony. The second time through, and for each succeeding time, the folder icon will have a ‘+’ sign in the upper right corner showing that you can submit another document.
16. When all documents have been loaded for the given year, submit (upload) the documents by clicking on the check mark. You must do this for each year. If you upload more than one year’s photos before submitting, all photos will be uploaded to the currently selected year. If you submit after each file, they will each display in their own page on the map and make it more difficult to find images for one year all together.
17. Once the photos are uploaded you will be returned to the open PIGU Add Colony form. Click the link to the Colony Description form to return to the form to add photos for a different year, following all the steps above.
18. To add documents for a different colony, return to the Inbox view of the Add Colony form, find the colony, open the form in either ‘View’ or ‘Edit’ mode, and link to the Colony Description form.

Note: The Colony Description form is not intended to hold digitized Beach Data Sheets. Those are archived via page 4 of the Survey123 Survey Form.