

# Rapid Rainforest Assessment

## Survey123 Instructions & FAQs

### Use this guide to:

- **UNDERSTAND** how to download the Survey123 app and how to access the RRA survey form.
- **ANSWER** any questions you may have about Survey123.

For questions relating to the RRA survey, please refer to the [RRA survey form](#) or the [RRA guidance notes](#) for more detailed instructions and background information. Other useful resources available include the [Species ID Guides](#) and the [Rainforest lichens and bryophytes – a toolkit for woodland managers](#).

# 1 How do I download the Survey123 app and access the RRA survey?

Downloading the Survey123 app on your smart device is the first step to getting access to Plantlife's surveys. The second step is downloading the survey via a link or a QR code (provided below). This two-step process is a result of using Esri's ArcGIS Survey123 application which affords Plantlife the ability to design surveys in-house.

**Note: If you have already downloaded the Survey123 app, you DO NOT need to download it again (unless you wish to update your current version). You can skip to the second step.**

## FIRST STEP

To download the free Survey123 app, click on one of the following links that suits your smart device (phone or tablet):

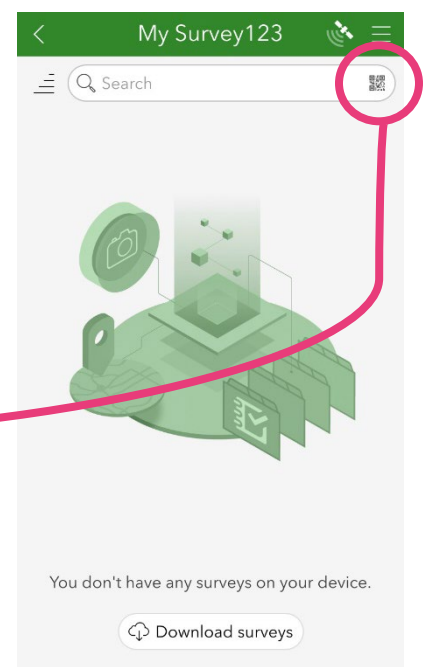
- [Survey123 for Android \(Google Play\)](#)
- [Survey123 for iOS \(Apple Store\)](#)

When you open the Survey123 app for the first time, you will be asked if Survey123 can access your camera - click 'Yes/Allow'. You will then see a log in screen (as seen on next page) - click 'Continue without signing in' at the bottom of the screen. You may also be asked about Survey123 having access to your location - we would recommend selecting 'Allow while using app' as most surveys will record your location. You will then see the 'My Survey123' screen as featured on the right below. You will not see any surveys on this page unless you have already used the Survey123 app for other surveys.

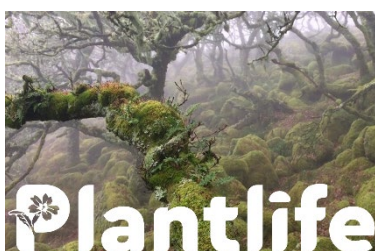
## SECOND STEP

To access the RRA survey, you will need to click on [this link](#) on the same device you downloaded the Survey123 app on to **OR** you can scan the QR code below within the app using your device's camera.

The survey will then be downloaded and opened in the Survey123 app. At that point, you will be ready to start your first RRA survey!



**YOU WILL ONLY NEED TO GO THROUGH THIS PROCESS THE FIRST TIME YOU ACCESS THE SURVEY**

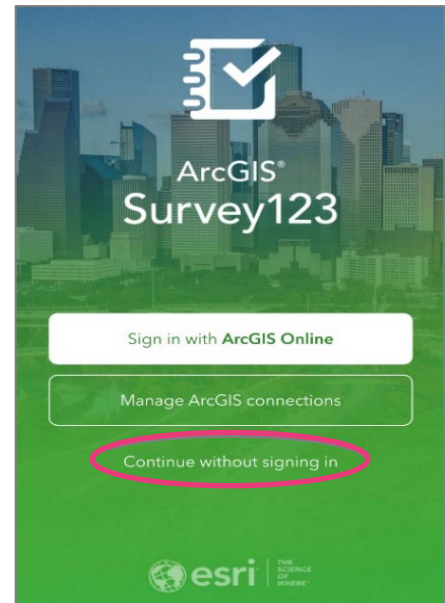


For all subsequent surveys, simply open the Survey123 app on your device and click on the RRA icon (as seen on the left) on your 'My Survey123' screen. Then, click 'Collect' at the bottom to fill out another survey. You can submit as many surveys as you would like.

## 2 Do I need to login to the Survey123 app?

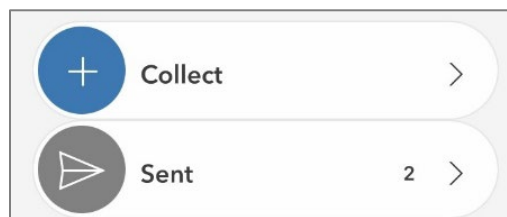
**No, you do not need to sign in or create sign in details to use the Survey123 app.** After downloading and opening the Survey123 app, you should see the screen featured on the left.

The text at the bottom of the screen that says ‘**Continue without signing in**’ is what you want to click. You will need to click this each time you open the Survey123 app. **However, if you have an ArcGIS account you may wish to use your credentials.**



## 3 If I’m revisiting the same site, can I copy or view a survey I’ve previously submitted?

**Yes.** After you submit your first survey, you will see a ‘Sent’ folder at the bottom of the survey summary page:



If you click into the ‘Sent’ folder, you can see all previously submitted surveys from your device. By clicking on one of the surveys, you will be given the option to ‘View’ or ‘Copy sent data to a new survey’. By choosing the ‘Copy sent data to a new survey’ option, you can make any necessary changes and submit as a new survey.

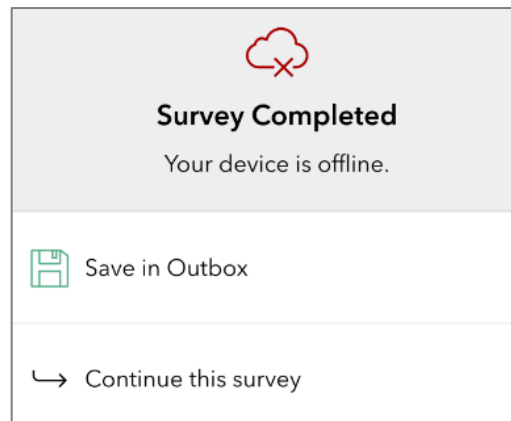
## 4 If I’m submitting a survey multiple times, is there a way to save some of the information so I don’t have to keep re-entering it?

**Yes.** Once you have populated the survey with the answers you wish to save for future surveys, you can set them as your favourite answers by clicking the menu icon in the upper right corner of the screen. You will then select the option ‘Set as favourite answers’. Once your favourite answers have been saved, you can insert them into new surveys by clicking on the menu icon again at the start of your next survey and selecting ‘Paste answers from favourite’.

## 5 What if I don't have a mobile data plan or the location, I'm going to is very remote and I may not have access to mobile data?

Yes, see instructions below. **Please also refer to question refer to question 8 about accessing maps offline.**

When connected to Wi-Fi or mobile data, download the Survey123 app, as well as any surveys you need to take into the field. You can then begin capturing survey information without a data connection. Upon completing the survey, you will be given the option to 'Save in Outbox', please select this option (see below). In doing so, all your survey results will be stored locally on your device.

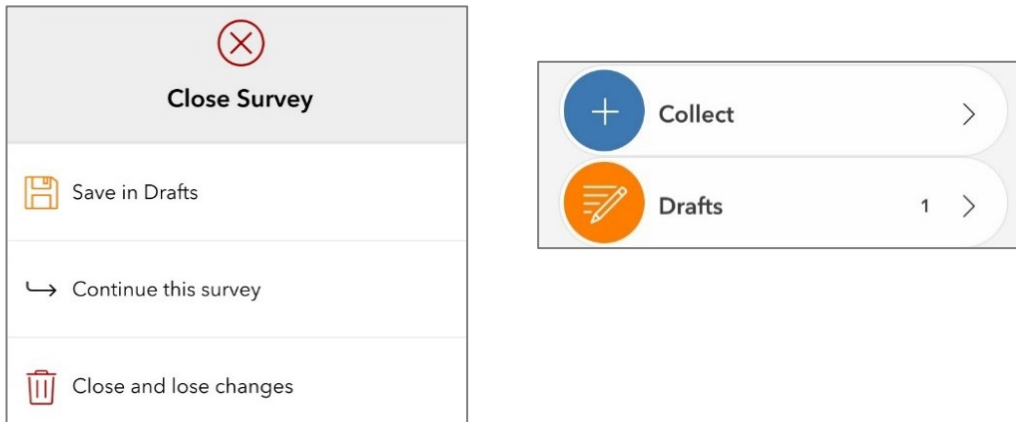


**When you are able to reconnect to Wi-Fi or mobile data, you will need to submit your survey that has been saved in your Outbox.** To do this, navigate to the survey summary page where you will see an 'Outbox' folder (see image below). By clicking on this folder, you will be able to see the survey you filled out and can submit it by clicking 'Send' in the bottom right corner of the screen.

**Note: If you have multiple surveys saved to the Outbox, they will all send at the same time because the Outbox is intended to store forms that are ready to be submitted. If there is a chance you will want to edit a survey before you submit, save the survey as a draft (See next question about drafts).**

## 6 Can I save my survey as a draft and edit before submitting?

Yes. If you would like to save your survey as a draft, click on the X in the upper left corner of the screen which opens the 'Close Survey' window below. Here you will be given the option to save the survey as a draft. To access the draft you have saved, navigate to the survey summary page where you will see a 'Drafts' folder (see image below). By clicking on this folder, you will be able to see the survey you have saved, edit as needed and can submit it.




## 7 How do I make the text larger on the Survey123 app?

If you're having trouble with the size of the text, you can customise these settings within the Survey123 app. Click on the menu icon in the upper right corner of the 'My Survey123' page and then select 'Settings'. In Settings, select 'Text' and adjust the text size by sliding the circle to the right to increase the size.

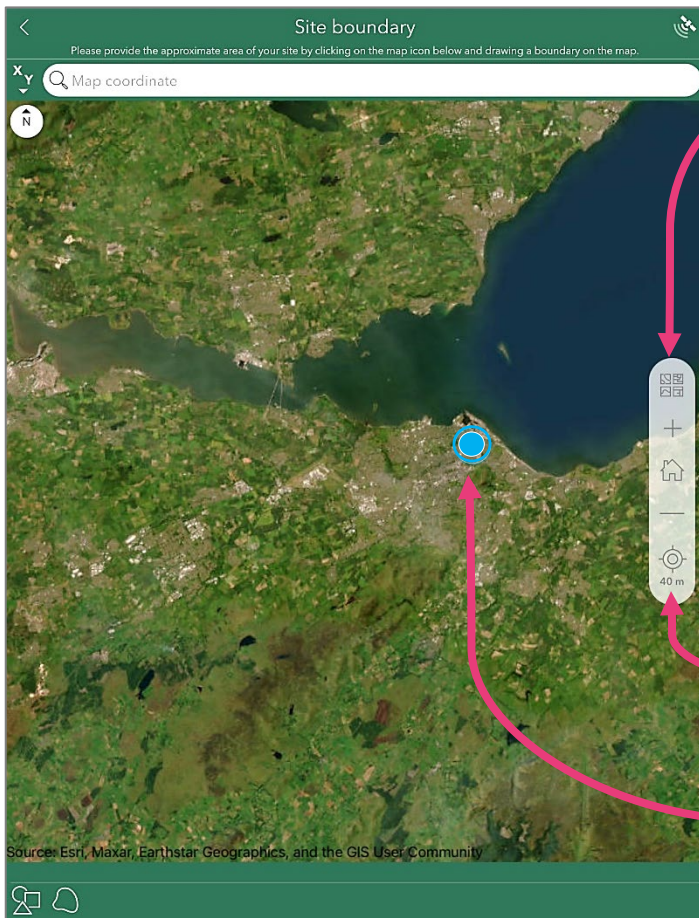
## 8 How do I use the mapping/ geolocation capabilities in the Survey123 field app?

**Note: Please note that all geographic data collected in the Survey123 field app is in the WGS 84 geographic coordinate system. This means point locations will be captured as Latitude/Longitude and areas (polygons) will be projected in WGS 1984 Web Mercator Auxiliary Sphere (i.e. not OSGB 36). This means that the area calculations in the field app will be slightly distorted for the UK.**

### Geographic areas (polygons)

On the second page of the RRA survey you are asked to draw a boundary of your site on a map. By clicking on the small map icon  beneath the question, a large map will open like the one on the next page:



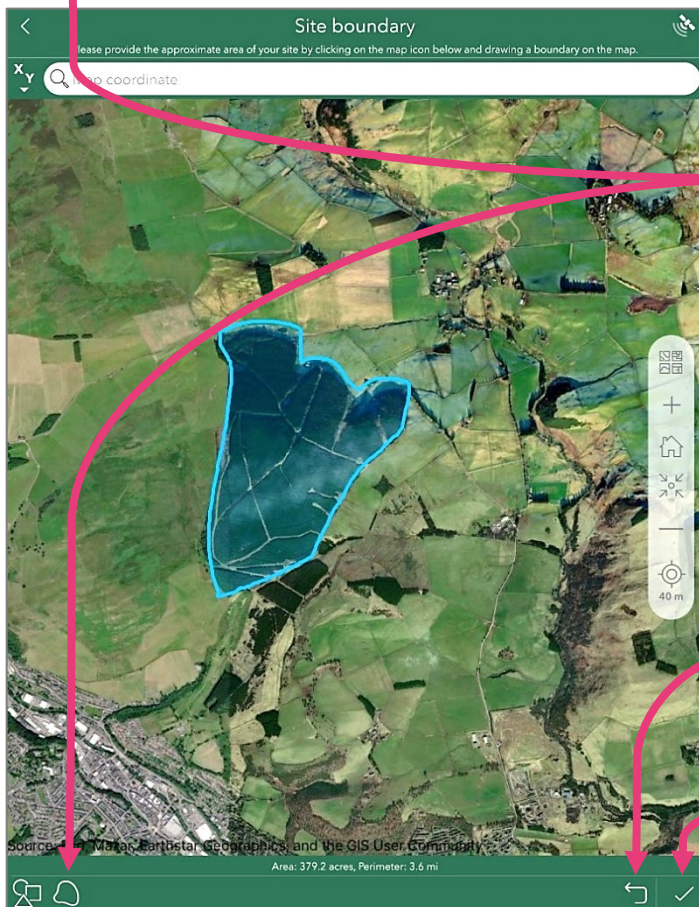


The basemap button enables you to switch the background map. If your device is online, you will have a selection to choose from, but World Imagery will likely be the most useful. If you are planning to take your survey offline, please refer to the offline map section below.

Click to zoom in or out of the map.

Clicking this crosshair button will centre the map on your location and will tell you the approximate horizontal accuracy.

Your location will be represented by a blue dot on the map. If you cannot see a blue dot, please refer to the next question to ensure location services are enabled on your device.



Clicking this drawing tool will allow you to draw an area on the map using a stylus or your finger. It will flash when it is activated indicating that when you touch the map the boundary will start drawing. If you want to redraw your area, click the drawing button again and you will be asked if you want to replace the area.

Click the undo button if you want to revert back to a previously drawn area.

Click the tick when you are satisfied with the area you've drawn. This will take you back to the survey form where you will see a small map preview with the area you have drawn (see below).

### Site boundary


Please provide the approximate area of your site by clicking on the map icon below and drawing a boundary on the map.

Area: 379.2 acres, Perimeter: 3.6 mi



The area and perimeter measurement in this window will not be accurate due to the map projection – refer to the note at the beginning of this question for more details.

### Point locations


On the fifth and sixth pages of the RRA survey you are asked to record point locations of a species. By clicking on the crosshair icon  beneath the question, a small map will appear as pictured below:

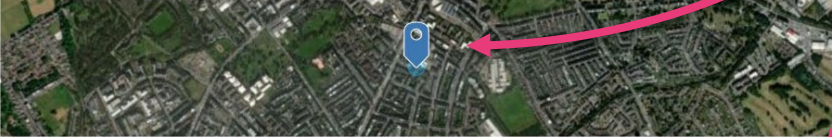
**Indicator species**

Record the location of any indicator species (see guidance notes for species lists and links to ID guides). For widespread species, a central 6-figure grid reference for the population is sufficient. If the species is confined to a particular area, use a 10-figure grid reference. Record management issues affecting (or likely to affect) the species e.g. presence of nearby invasives. This will help you to prioritise management actions. [Download a species ID guide for your region.](#)

Species name Sticta sylvatica	Grid reference (if applicable)
Abundance (DAFOR scale) D A F O R (F is selected)	Habitat feature/substrate Rock



Click on the crosshair icon below to record your current location.

 55.967°N 3.173°W ± 40.0 m



Any management issues?  
None

Click the '+' below to add another indicator species record.

 1 of 1 


The blue pin on the map indicates that the record has been placed at your current location. If for any reason you want the pin to be at another location, click on the map to open the larger map window and drag the pin to a different location and click the tick. The coordinates of the record will be shown at the top of the map.

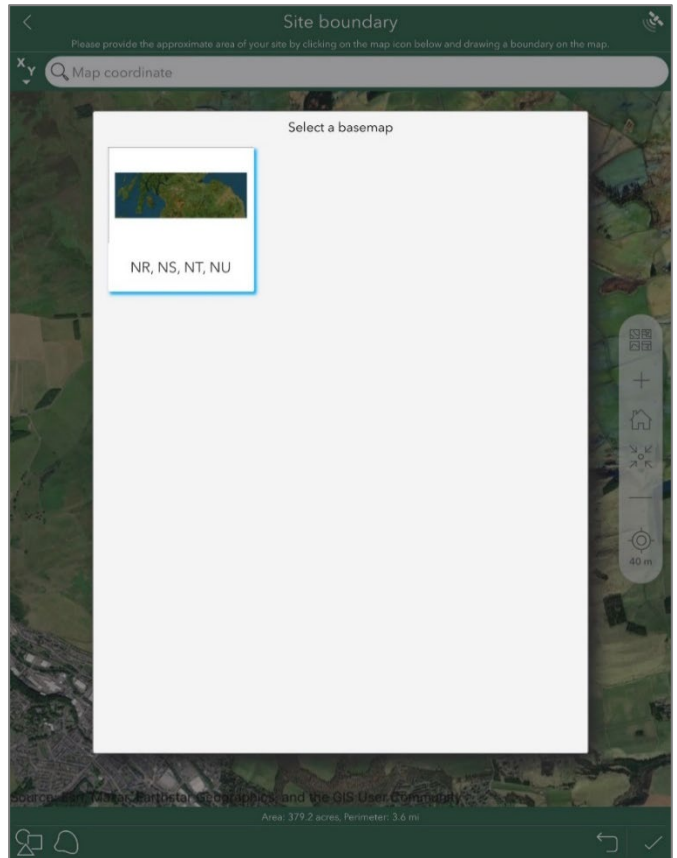
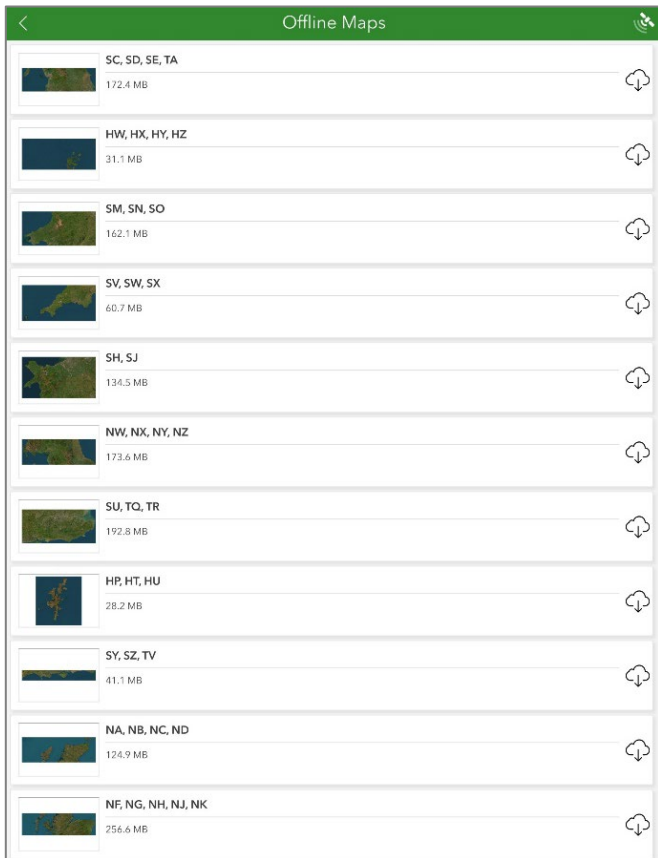
To add another species record, click the '+' button and repeat the same process.

## Offline maps

If you are planning to take the survey offline (i.e. with no access to mobile data) you will need to download offline basemaps so that you can see the background maps for the three questions involving the collection of geolocation data.

To download an offline map, navigate to the survey summary page and click on the three parallel lines in the upper right corner. Then click on the 'Offline Maps' option. You will then be presented with a list of offline maps as shown on the left.

Click the download button  for the offline area that contains the 100 km grid square you will be surveying within. This map area will now be available for use as a basemap when you are working offline. When you first open a map question you may have to select the offline map you've downloaded from the basemap gallery as shown on the right.






## 9 How do I enable location services on my mobile device?

The following information comes from [Esri's ArcGIS Survey123 FAQ for submitters](#):

**On iOS**, when the app is launched for the first time after installing, you will be asked if you want to capture location only when the app is on, always, or never. This can be changed later in your device's settings, by browsing to **Settings > Privacy > Location Settings > Survey123**.

**On Android**, when the app is launched for the first time after installing, you will be asked if you want to allow access to the device's location. This can be changed later in your device's settings, by browsing to **Settings > Apps > Survey123 > Permissions** (or similar depending on the Android device). On Android, when you run the app in the background, a notification that the app may be using your current location appears; however, your location will only be captured according to the behaviour chosen in the **location settings within the app**. The default behaviour is to only capture the location as needed by a survey, meaning that no location is captured when the app is in the background.

## 10 How accurate is the location captured by the Survey123 field app?

The accuracy of the location collected depends on the quality of the integrated location provider on your device. If you have an external GPS unit that you would like Survey123 to use, click on the GPS receiver button in the top ribbon  and then on the settings cog to add a different location provider.



### Plantlife

Brewery House  
36 Milford Street  
Salisbury  
Wiltshire SP1 2AP  
01722 342730

[enquiries@plantlife.org.uk](mailto:enquiries@plantlife.org.uk)

[plantlife.org.uk](https://www.plantlife.org.uk)

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**To secure a world rich in  
wild plants and fungi.**