

Survey 123 - Getting Started

For use with OAI & OHI Submissions

The Ohio State Historic Preservation Office currently uses Esri's Survey123 to intake and manage Ohio Archaeological Inventory (OAI) and Ohio Historic Inventory (OHI) forms.

Follow this guide to:

- Identify if you need an Online Mapping System (OMS) subscription to complete forms.
- Download Survey123.
- Access OAI & OHI forms.
- Learn more about how Survey123 stores and manages your forms.
- Review Frequently Asked Questions.

For additional information or assistance, contact us at

shpo@ohiohistory.org

Ohio State Historic Preservation Office
Survey123 - Getting Started

Subscription Overview

OHI Only



No Subscription Required

Currently, access to complete OHI Forms is unlocked - a subscription to the OMS is not required.



OAI Only



Subscription Required

Access to OAI Entry Forms require an active Creator-level OMS subscription. This subscription allows users to view and edit data from any device.

[Learn more about OMS subscriptions](#)

Download Survey123



Download Survey123

Accessing survey forms requires the installation of the Survey123 field app.

[Download Survey123](#)

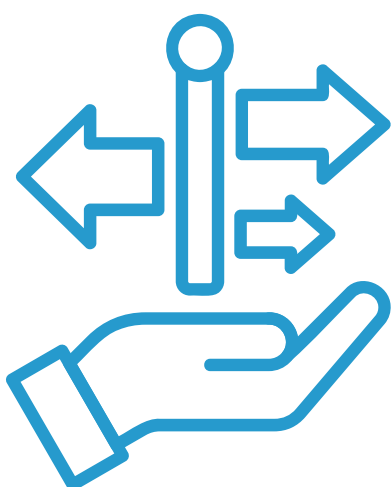
OAI
&
OHI

Accessing OAI & OHI Forms

OHI Only



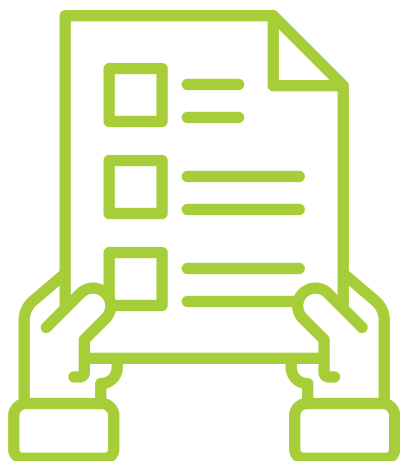
Download Form
[Download the OHI Entry Form](#)



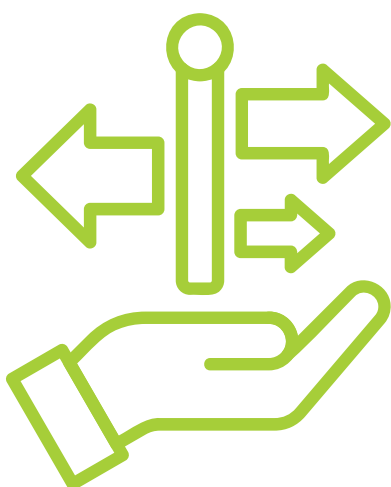
**Request Site Numbers
& View Guidance**
[Click to download Request Form](#)
[Click to download Request Table](#)
[Download and view guidance](#)

[To learn more about the OHI, visit our website](#)

OAI Only



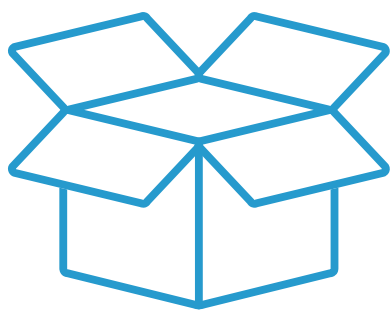
Download Form
[Download the OAI Entry Form](#)
[Download the References Submission Form](#)



**Request Site Numbers
& View Guidance**
[Click to request site numbers](#)
[Download and view guidance](#)

[To learn more about the OAI, visit our website](#)

Beginning Entry Forms



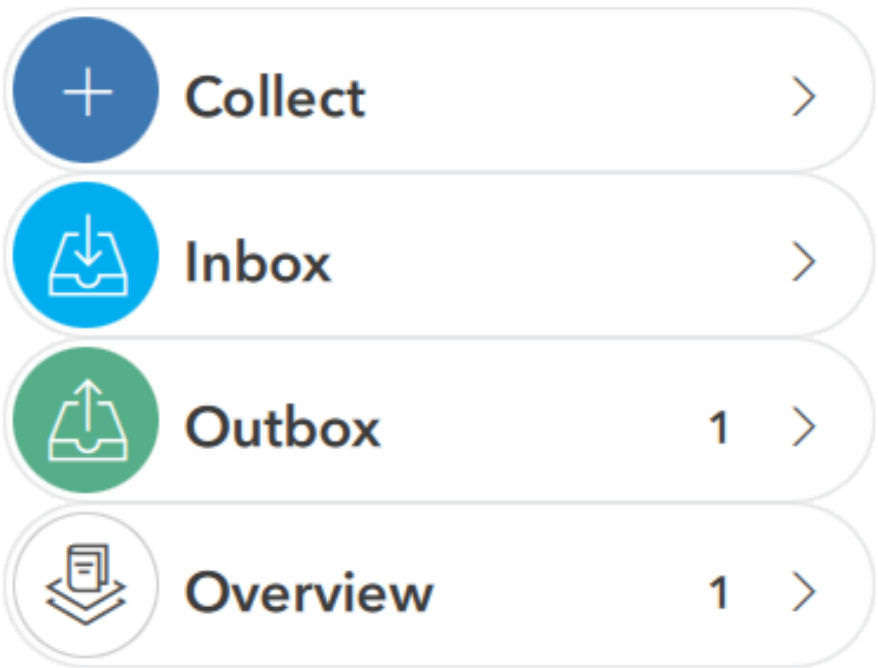
Landing Page

All entry forms associated with your account or device appear on the landing page.



Beginning a Form

Accessing an entry form will present you with a number of options (see *Understanding Survey123 Boxes* for more information) at the bottom of the window. To begin a new form, select *Collect*.



Understanding Survey123 Boxes

OHI Only



Sent box

Contains all forms submitted to SHPO from the local device.

OAI Only



Inbox

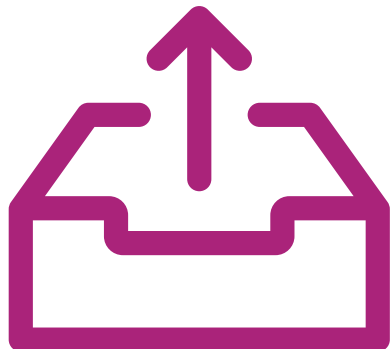
Contains all forms submitted to SHPO from the user's account.

OAI & OHI



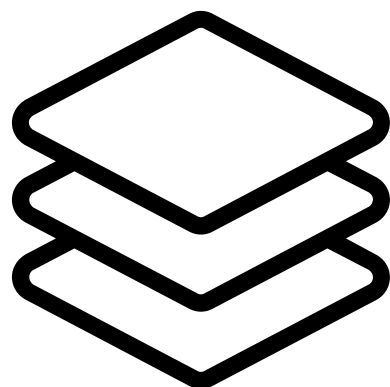
Drafts

Contains incomplete surveys that are still being edited by the user.



Outbox

Contains completed forms not yet submitted to SHPO for review.



Overview

Aggregates all survey records currently stored within Outbox and Inbox (OAI) / Sent box (OHI).

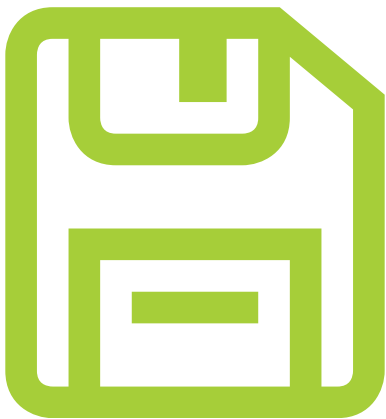
Saving Forms as Drafts



Close Survey

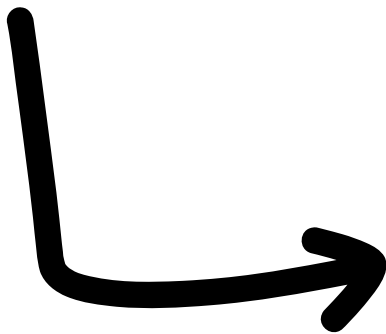
At any time, click the 'x' in the top left corner to close the survey.

Three options will appear:



Save in Drafts

Saves form as a draft, accessible in the Drafts box.



Continue this survey

Allows you to continue making edits to the form.



Close and lose changes

Discards new form or any edits made to draft form.

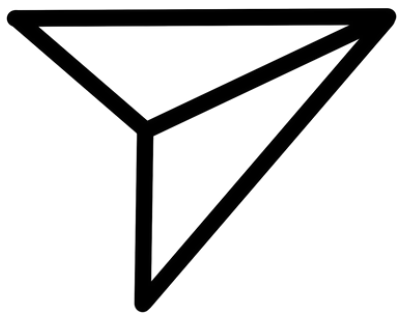
Submitting Forms



Survey Completed

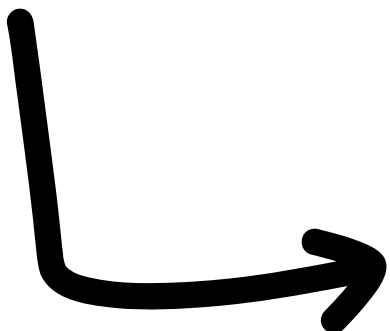
When all required fields are complete, select the check mark at the bottom right corner of the form.

Three options will appear:



Send now

Submits the form to SHPO for review.



Continue this survey

Allows you to continue making edits to the form.



Save in Outbox

Saves form to the Outbox.

Frequently Asked Questions

OAI Only



While downloading the OAI Entry Form, I receive a “survey not found” error.

Before downloading the OAI Entry Form, ensure you are logged into Survey123 using your OMS account.



While accessing Survey123, I receive a “this user has no permissions” error.

Ensure your OMS subscription grants you Creator access and is active. If your OMS subscription is valid, please close out of Survey123 to refresh your connection.



I would like to QA/QC forms completed by supervised staff, how can I do this?

OAI: Please contact the [Archaeology Survey & Data Manager](#) for more information on reviewing OAI forms.

OAI
&
OHI



OHI: Unsubmitted OHI forms can be reviewed on the user’s device. Submitted OHI forms can be reviewed using the OMS website.

I downloaded a new copy of Survey123. All entry forms have disappeared from the landing page - how can I regain access?

To restore access, simply download the forms again.

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