ArcGIS Online

User Reference Guide

Updated September 5, 2023

Created by Shared Health Emergency and Continuity Management (ECM)

Shared **health**
Soins communs
Manitoba

Welcome to Shared Health's Geographic Information System (GIS), ArcGIS Online!

ArcGIS Online software has the capacity to create a digital picture using real-time and static data. This digital picture will provide a provincial lens of healthcare facilities and healthcare operations that will be shared with stakeholders to support decision making, assist in emergency responses and provide advanced situational awareness of potential and emerging emergency events, including pandemics.

This document has been created to guide users of ArcGIS Online on how to access and use Shared Health's GIS platform.

Users are provided a license that gives them the ability to access, submit and edit geographic data through features such as data layers, viewing web maps and using the Survey123 platform.

The accuracy of the real-time situational awareness dashboard (digital picture) will depend on the accuracy of data submitted by users. Effort should be made to ensure the accuracy of all data.

All users of ArcGIS Online are required to follow the 'Compliance Statement for Use of ArcGIS' that was signed upon the request for licensing.

Shared Health's ArcGIS Online account is managed and overseen by the Emergency and Continuity Management (ECM) Division of Emergency Response Services, Shared Health. The GIS Specialist of ECM is available for support at SharedHealthGIS@sharedhealthmb.ca.

Please note: This reference guide will be used throughout the health system and examples and photos included may not be specific to your area, but the steps remain accurate and relevant to your use.

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User types

Users of ArcGIS Online will be assigned a license based on the activities they will be responsible for in ArcGIS Online. The license type is selected on the 'Request Form for ArcGIS License' when the license is requested from ECM.

License types include:

- ***Viewer License*** – Provided to members of an organization who need to view content. These users do not have the ability to upload or edit data.
- ***Editor License*** – Provided to members of an organization who need to primarily view or edit data. This user can also upload and delete data.
- ***Mobile Worker License*** – Provided to members of an organization who will submit and edit data using an app called Survey123. The mobile worker license may also be referred to as a ***Data Submitter*** within Shared Health ArcGIS communications, documents, videos and guides.

Definitions

ArcGIS Online; also known as ArcGIS Online Organization and ArcGIS	All refer to cloud-based GIS mapping and analysis solutions. The geospatial software is used to make maps and view, edit, manage, analyze and share geographic data.
Data Submitter	A user with a Mobile Worker license.
Dashboard	A digital platform of location-based analytics that displays information on single screen using intuitive and interactive data visualizations such as a web map, charts and graphs.
Feature Layer; also known as Data Layer	A collection of geographic features that could be represented on a map, for example, hospitals, personal care homes and pharmacies.
Geographic Information System (GIS)	A system that creates, manages, analyzes and maps all types of data that could be association with a geographic location.
Splash Page	A page that precedes the main page of a website or app.
Survey123; also known as Survey123 Field App	Is a mobile or web app that uses a digital survey/form to collect and submit data to ArcGIS Online.
User	Individuals who have been provided a license to access content in ArcGIS Online.
Web App	A digital map with an interactive display of geographic data. The map can be zoomed in and out, panned around and data points can be selected to view additional information relevant to that data point.

Accepting the invitation to join ArcGIS Online

Users will receive an email with an invitation link to join ArcGIS Online. The email to receive the invitation will be the one provided on the 'User Request Form'. To accept the invitation to join ArcGIS Online, follow these steps:

1. A pre-determined username will be provided in the email. Click on the invitation link to join.

   Note: Users must click on the activation link within 14 days to prevent the link from expiring. If the activation link expires, a new request form will need to be sent to SharedHealthGIS@sharedhealthmb.ca.

2. Users will be required to set a password. Select a password as per the requirements. Once selected, click **Change Password**.

   Password requirements:
   - Cannot match the username
   - Must be at least 8 characters long
   - Must contain at least 1 letter(s) (A-Z, a-z)
   - Must contain at least 1 number(s) (0 – 9)

Example of invitation email

From: ArcGIS Notifications <notifications@arcgis.com>
Date: July 19, 2023 at 6:33:28 PM CDT
To:
Subject: An invitation to join an ArcGIS Online organization, Shared Health MB.
Reply-To: donotreply@arcgis.com

Emergency and Continuity Management, Shared Health has invited you to join ArcGIS Online Organization.

Please click this link to finish setting up your account and establish your password to join the organization, Shared Health MB:
https://www.arcgis.com/home/newuser.html?invitation=A2a9484ab5b574379b8353e3cb418d147

This link will expire in 14 day(s).

Note that your account has already been created for you with the username,

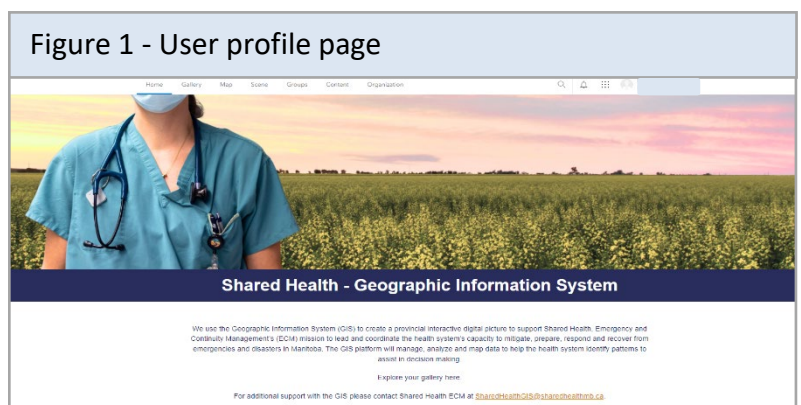If you have difficulty signing in, please contact Shubhreet Gill ( ).
Be sure to include a description of the problem, the error message, and a screenshot.

For your reference, you can access the home page of the organization here:
https://SharedHealthMB.maps.arcgis.com

Experience what's possible with ArcGIS Online. For free hands-on lessons and other resources, visit Learn ArcGIS.

This is an automated email. Please do not reply.

3. Users will be required to select a security question and answer. Once selected, click **OK**.

4. On completion of step 3, the users profile page (figure 1) of Shared Health ArcGIS Online account will open. Do not make any changes to the profile.

Figure 1 - User profile page

Shared Health - Geographic Information System

We use the Geographic Information System (GIS) to create a provincial interactive digital picture to support Shared Health. Emergency and Continuity Management's (ECM) mission to lead and coordinate the health system's capacity to mitigate, prepare, respond and recover from emergencies and disasters in Manitoba. The GIS platform will manage, analyze and map data to help the health system identify patterns to assist in decision making.

Explore your gallery here.

For additional support with the GIS please contact Shared Health ECM at SharedHealthGIS@sharedhealthmb.ca.

5. Users will receive an acknowledgment email from ArcGIS Online that confirms the invitation has been accepted.

Viewing content using a web browser

Once signed into ArcGIS Online, users can access and view the content shared with them (all users do not have access to the same content). Content can include a feature layer (also called data layer), web map, web app and dashboard.

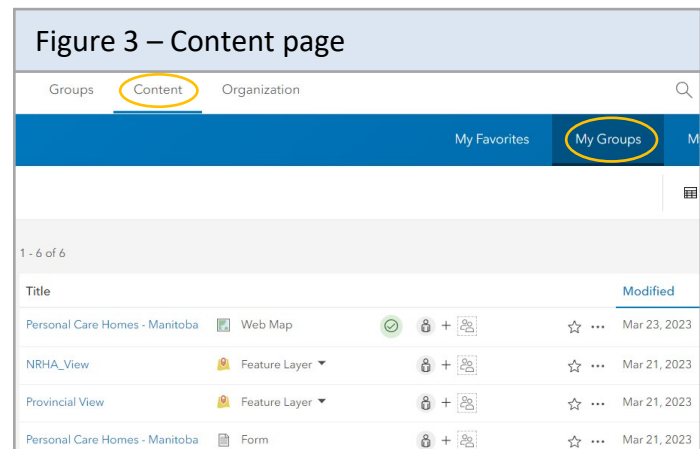To view content, follow these steps:

1. Sign into ArcGIS Online at
   https://www.arcgis.com/index.html. A
   splash page (figure 2) prompts users to
   sign in to their ArcGIS Online profile. Click
   on the **Sign in** button (figure 2).

   Users are to sign in using their username
   provided in the invitation email to join
   ArcGIS Online.

Figure 2 – ArcGIS Online web browser splash page

2. Click on the **Content** tab on the user's
   profile page (figure 3) followed by the **My
   Groups** tab on the content page (figure 3).

   Users will then see a list of items shared
   with them (feature layers, web maps, web
   apps, dashboards). Click on the desired
   item to open the selected items page.

Figure 3 – Content page

3. On the item's page, click on the selection available to view content. Options include: **Open in View (figure 4), Map Viewer (figure 5)** or **View Dashboard (figure 6)** and depend on the item selected. Visuals are included below; the yellow rectangle indicates where you can see the type of item you selected.

Figure 4 - View option

Figure 5 – Map viewer options

Figure 6 – Dashboard option

Accessing and downloading surveys in the Survey123 app

The ArcGIS Survey123 app is used to collect real-time data through surveys using smart phones and tablets (android and iOS). The Survey123 app allows users to download and complete data submissions (surveys) in both connected (with internet) and disconnected (without internet) environments.

To access, download and open a survey using Survey123, follow these steps:

1. Download and install the ArcGIS Survey123 app (figure 7) from the appropriate app store.

   The app may take a few minutes to install. When it completes, you'll see the app icon added to your device.

   Important!
   Do not allow the app to use your device's current location.

Figure 7 – App icon
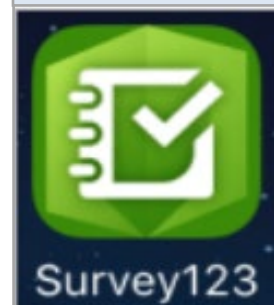
2. Select the app to open Survey123 . A splash page (figure 8) prompts users to sign in to their ArcGIS Online profile. Click on **Sign in with ArcGIS Online**.

   Users are to sign in using their credentials that were provided in the invitation email received to join ArcGIS Online.

Figure 8 – Survey123 splash page
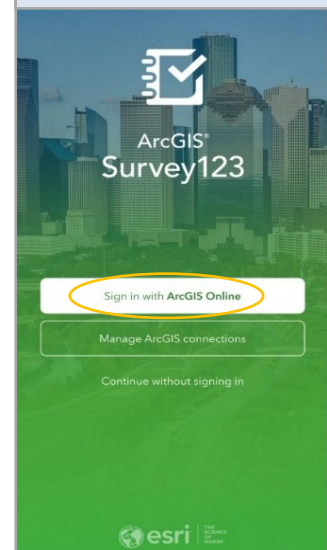
3. The app opens the My Survey123 gallery (figure 9), which displays all the surveys that a user is working with in Survey123.

   If this is the first time a user is using Survey123, the gallery will appear empty with the message, 'You don't have any surveys on your device'.

4. First time users of Survey123 will need to click on **Download surveys** (figure 9).

Figure 9 – Survey123 gallery
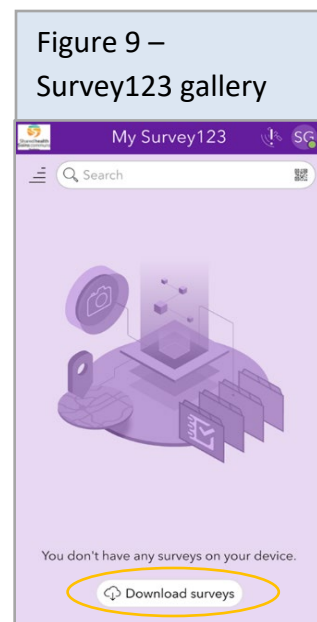
5. On the Download Surveys page (figure 10), click on the **download icon** ☁ that is beside the survey you want to download.

6. Once the survey is downloaded, select the **back icon** ◁ (figure 10) to navigate back to the My Survey123 gallery.

Figure 10 – Download surveys page
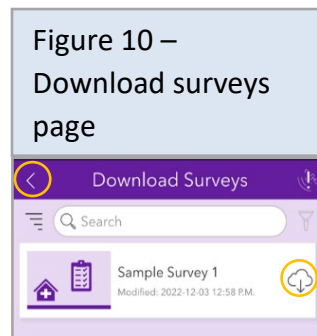
7. The survey will now appear in the users My Survery123 gallery (figure 11). To open the survey, users must select the **survey icon** they wish to open.

Figure 11 – Survery123 gallery with survey added
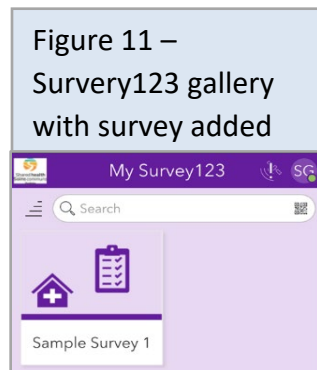
Accessing Survey123 using a web browser

Survey123 can be accessed by web browser on a smartphone, tablet or computer. Supported browsers include Google Chrome, Microsoft Edge, Mozilla Firefox and Safari.

To access a survey using the Survey123 web browser, follow these steps:

1. Sign into ArcGIS Online at https://www.arcgis.com/index.html. A splash page (figure 8) prompts users to sign in to their ArcGIS Online profile. Click on the **Sign in** button (figure 12).

   Users are to sign in using their credentials that were provided in the invitation email received to join ArcGIS Online.

Figure 12 – ArcGIS Online splash page

2. If this is the users first-time logging into ArcGIS Online, they will need to verify their email address before accessing content. An email with a verification code will be sent to the user's email address associated with their account, they will then need to enter this verification code into the verification code box on the webpage.

3. To access content, users must accept the pop-up of Terms of Use of Shared Health GIS.

4. The Shared Health, ArcGIS Online Organizations splash page opens up (figure 13). Click on the **Content** tab to access the content shared with you.


Figure 13 – SH ArcGIS Online Organizations splash page

5. In the Content tab, users can either use the **My Groups** (figure 14) tab or **My Organization** (figure 15) tab to access the survey they wish to submit.

6. To open a survey, users must select the survey they wish to open.
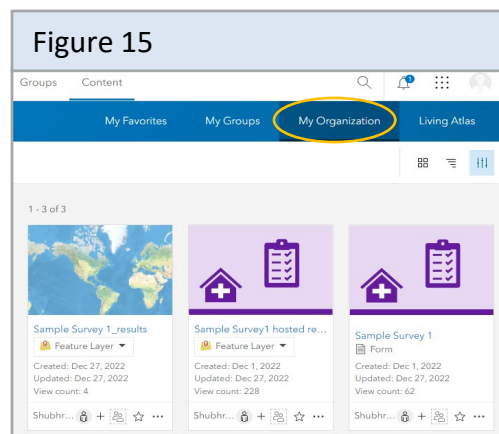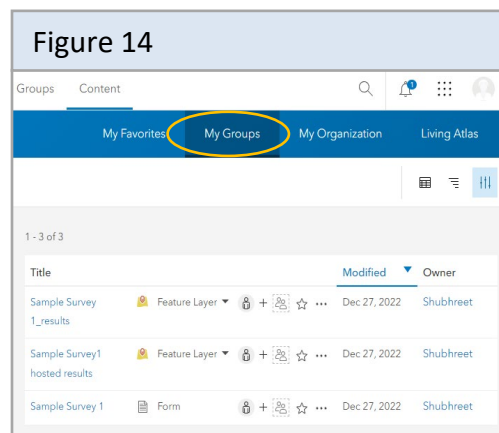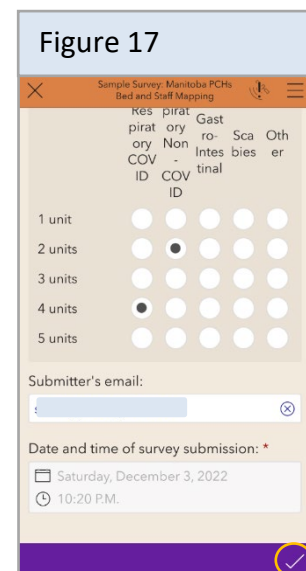
Figure 14

Figure 15

Submitting data using the Survey123 app

To submit data using the Survey123 app, follow these steps:

1. Select the app to open Survey123. Click on **Sign in with ArcGIS Online** (figure 8).

2. On sign in, the app opens the My Survey123 gallery, which displays all the surveys that a user is working with in Survey123.

3. Select the survey to submit.

4. On the selected Surveys page, click on **Collect** (figure 16) to open the survey.

5. Complete the survey and input the data requested.

Figure 16 – Survey page
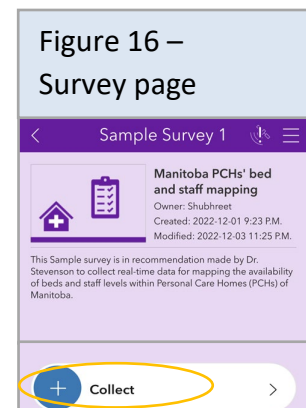
6. Once all the questions have been answered, select the check icon ✅ (figure 17) to submit the responses.
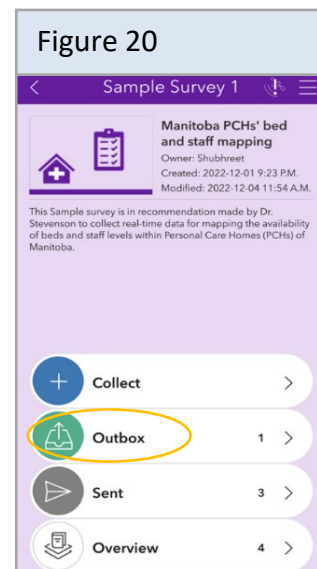
Figure 17

7. On submission, users will see a Survey Completed message appear. The message that appears is based on if the device is connected (figure 18) or disconnected (figure 19) from the internet. Users will be required to select an option presented; Send now, Continue this survey or Save in Outbox.

Options presented on the Survey Completed message will process as follows:
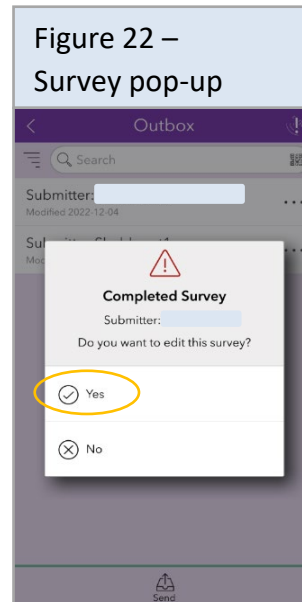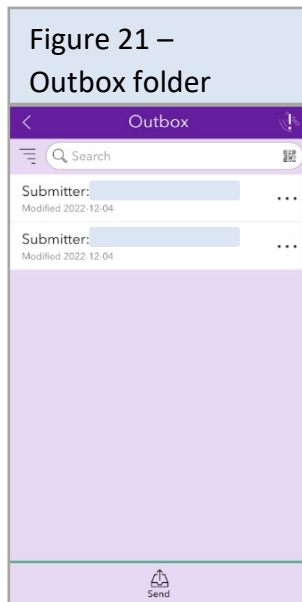

Figure 18

> ▷ **Send now** will submit the survey instantly.
>   <u>* No further actions are required by the user and the user does not need to continue to step 8.</u>
> ↳ **Continue this survey** will open the survey again to allow users to edit the answers before submitting the survey. Once edited, return to step 5.
> 💾 **Save in Outbox** will save the survey answers to the user's device. This option would be used when users have no internet connection or when users need to finish the survey at a later time. Continue with step 8 to complete submission of the survey when ready to submit.
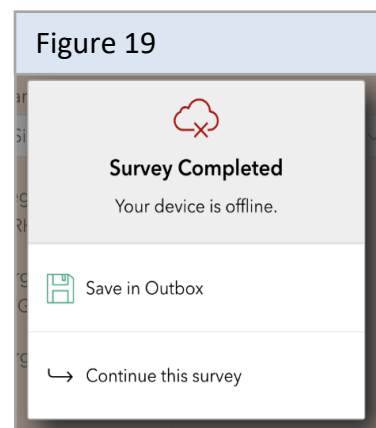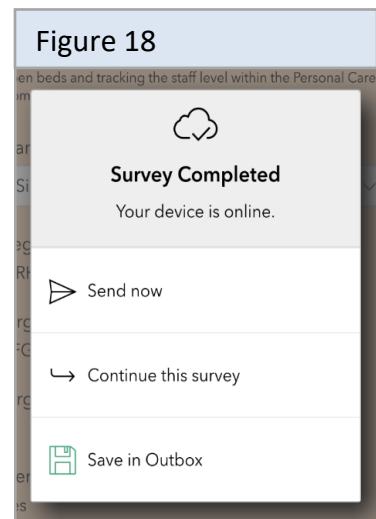
Figure 19

8. When users are ready to submit the survey saved in their outbox, go to the survey page and click on the **Outbox** (figure 20) folder.


Figure 20

9. In the Outbox folder (figure 21), choose the record to edit or submit. A Completed Survey pop-up will appear, select **Yes** (figure 22).

Figure 21 – Outbox folder

Figure 22 – Survey pop-up

10. The survey will open. Edit responses as required. Once edited and ready to submit, return to step 3.

* If still not ready to submit the survey, click the ❌ (figure 23) and choose **Save in Drafts** (figure 24). The survey will be saved in the users draft folder. The saved survey can be accessed anytime from the draft folder and can be submitted as usual when ready.
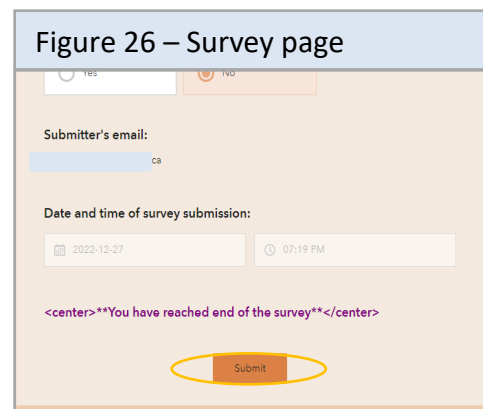

Figure 23

Figure 24
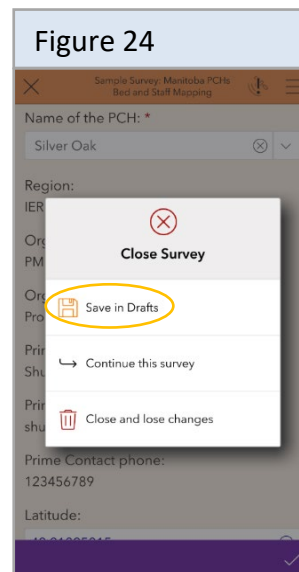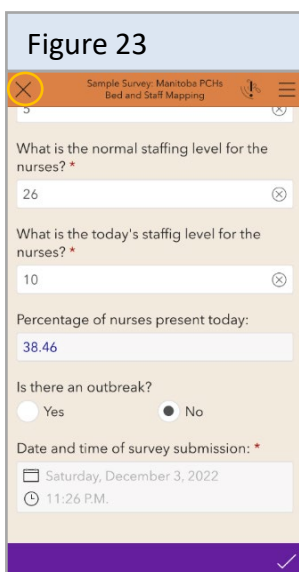
Submitting data using Survey 123 in a web browser

To submit data using Survey123 in a web browser, follow these steps:

1. Complete the steps in 'Accessing Survey123 using a web browser' (page 11).

2. Select the survey to submit.

3. On the survey page (figure 25), select **Open in Survey123** to open a dropdown, then select **Open in browser** from the drop-down options.

Figure 25 – Survey page
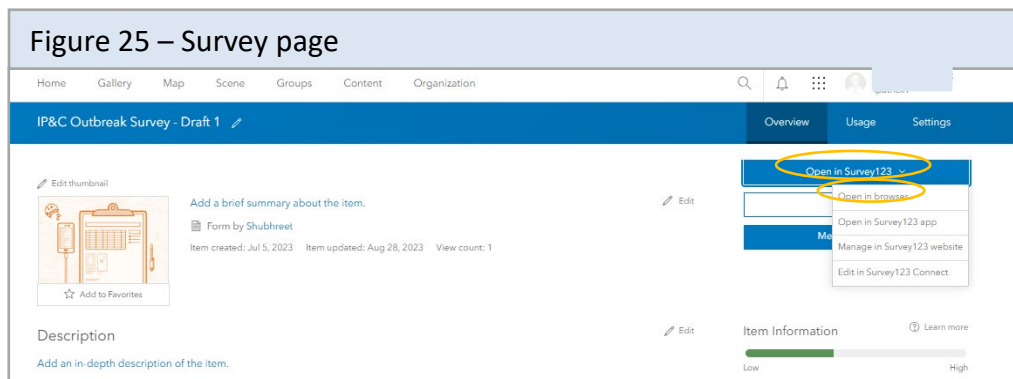
4. The survey will open. Complete the survey and select **submit** (figure 26) to submit the completed survey.

Figure 26 – Survey page

5. After submitting the survey, a Thank you screen (figure 27) will appear that indicates successful submission of the survey.
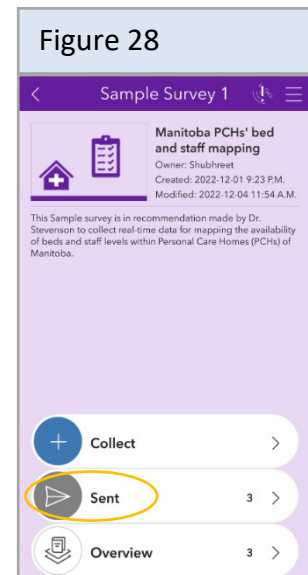

Figure 27 – Thank you screen
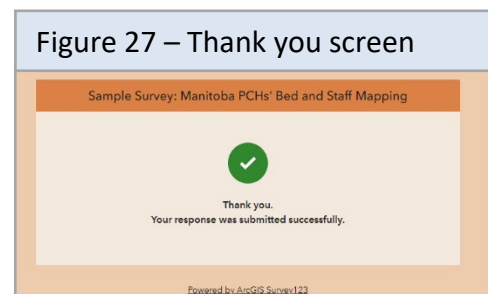
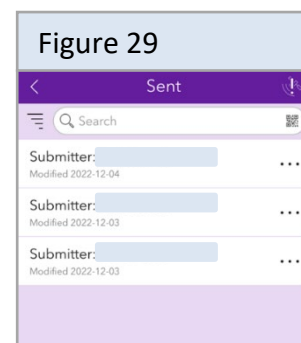# Editing survey submissions
using the Survey123 app

Previous survey submissions can be edited and resubmit if required. This option could be used if it is found that the data submit was not accurate or the submission was sent by mistake.

To edit survey responses in the Survey123 app, follow these steps:

1. Select the app to open Survey123 . Click on **Sign in with ArcGIS Online** (figure 8).

2. On sign in, the app opens the My Survey123 gallery, which displays all the surveys that a user is working with in Survey123.

3. Select the survey to submit.

4. On the selected Surveys page, click on the **Sent** folder (figure 28).

Figure 28

5. Select the survey record you would like to edit from the list of records shown (figure 29).

Figure 29

6. A message box appears asking if you want to view the selected record, edit and resend the selected record or copy the record as a new response. Choose **Edit and resend** (figure 30).

7. The survey will open, edit your responses as required.

8. Return to step 6 of 'Submitting data using the Survey123 app' (page 13) to submit the edited survey.
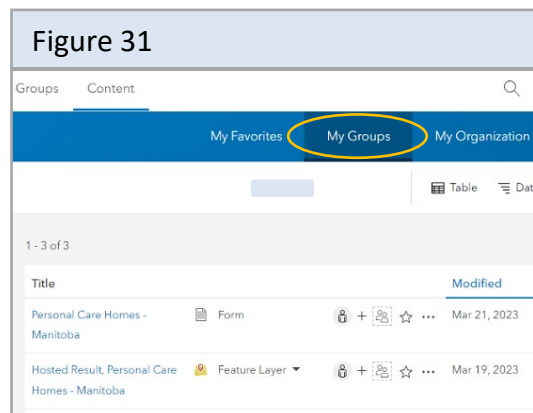

Figure 30
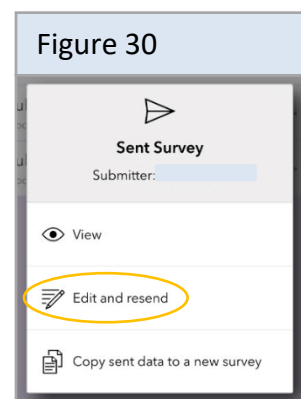
# Editing survey submissions
using a web browser

Previous survey submissions can be edited and resubmit if required. This option could be used if it is found that the data previously submit was not accurate or the submission was sent by mistake.

To edit survey responses using a web browser, follow these steps:

1. Sign into your ArcGIS Online account at https://www.arcgis.com/index.html.

2. Shared Health, ArcGIS Online Organization's splash page opens up. Click on the **Content** tab at the top of the screen (figure 13).

3. In the Content tab, select the **My Groups** tab to open the user's surveys (figure 31).

4. Select the survey that requires editing.

Figure 31

5. The surveys feature layer overview page will open (figure 32). Click on the **Data** tab to access previous survey responses.

Figure 32 – Survey feature layer overview page
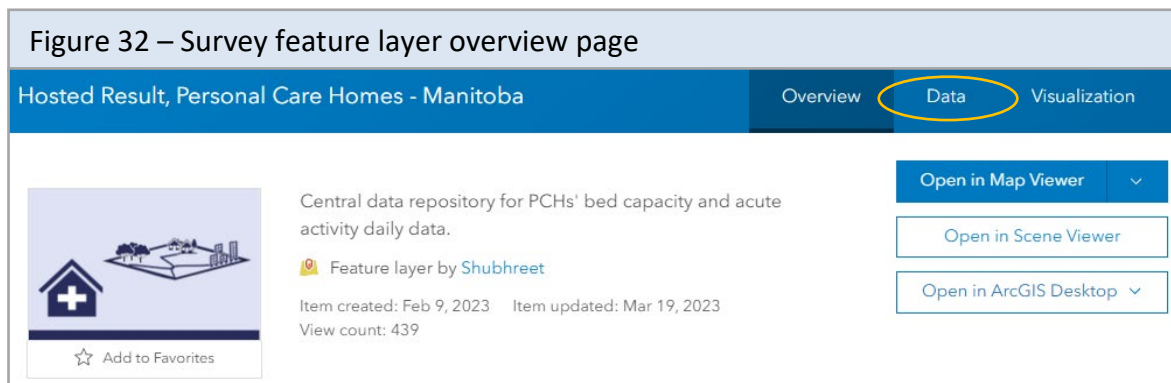
6. Select the survey record you would like to edit from the list of records shown.

7. The selected surveys data table will open. Edit the data as required.

To edit a response, double click the relevant cell and type in the new data.

The editor name and time of editing will be recorded in the feature layer as data is edited.

Changes will automatically save as they are made.

Figure 33 – Survey data table

Hosted Result, Personal Care Homes - Manitoba				Overview	Data
					Data updated: M
survey (Features: 17, Selected: 1)					
ALC PCH patien...	ALC PCH patien...	Beds available f...	Clinical	Latitude:	Licensing
31	19	4	11.00	49.91	0.00
23	2	19	8.00	49.91	0.00
22	2	18	8.00	49.91	0.00
22	2	18	8.00	49.91	0.00

Editing data and adding a data point using a web map on a web browser

Data shared with users can be edited using a web map on a web browser. In a web map data can be updated, deleted and added as required. The correct license is required to access this function.

To edit data using a web map on a web browser, follow these steps:

1. Sign into your ArcGIS Online account at https://www.arcgis.com/index.html.

2. Shared Health, ArcGIS Online Organization's splash page opens up. Click on the **Content** tab at the top of the screen (figure 13).

3. In the Content tab, select the **My Groups** tab (figure 31) to open the users surveys.

4. Select the survey that requires editing.

5. The surveys feature layer overview page will open (figure 34). Select **Open in Map Viewer**.

Figure 34 – Survey feature layer overview page
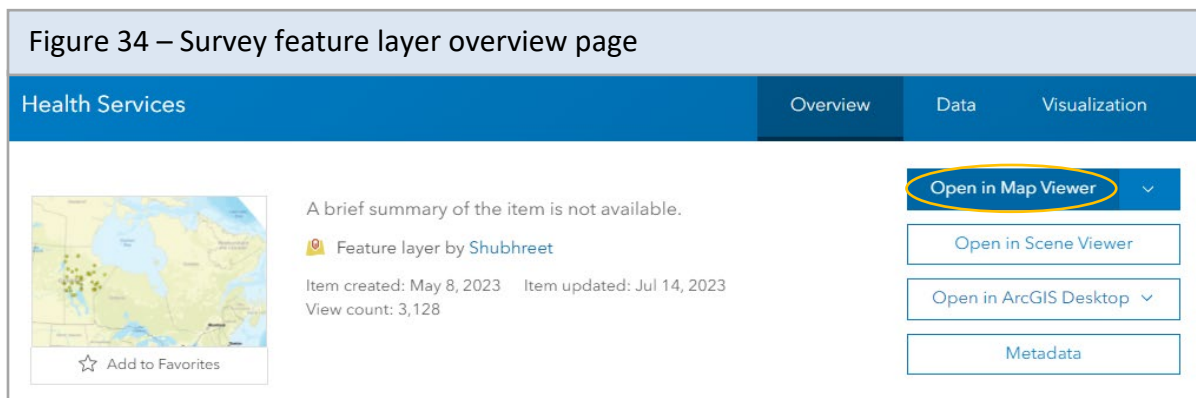
6. Map viewer will open the data in a digital map format.

7. Pan and zoom to the location on the map where you require editing. Click the **edit icon** ✎ on the Settings toolbar (green rectangle in figure 35).

8. The **Editor** pane appears (pink rectangle in figure 35).

9. To update or delete a record click on **Select** (figure 35) under edit features in the editor pane. Click on the desired data point that requires editing.

Figure 35 – Settings toolbar and Editor pane
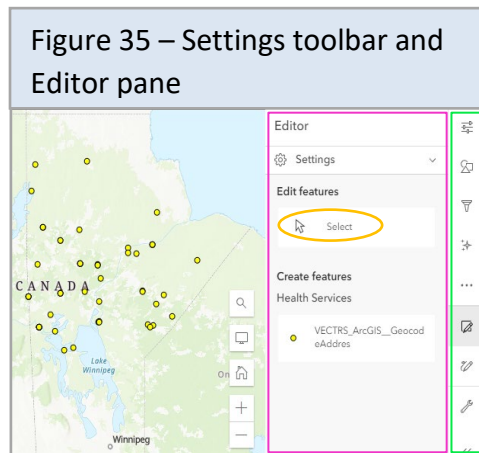
10. The selected data point will be highlighted on the web map and a corresponding record will appear in the **Edit Feature** pane (figure 36).

   Users can update any data in the record by clicking the corresponding box and typing a new value. The selected box will turn blue (figure 36).

   Press the keyboards **tab key** as edits are completed. To submit the edits, click on the **Update** option in the edit feature pane (figure 36).

   To delete data, click on the **Delete** option in the Edit Feature pane (figure 36).

Figure 36 – Data point and Edit feature
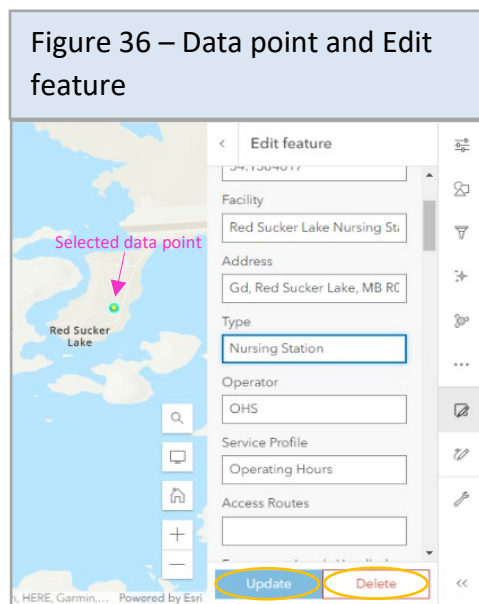
11. To add a data point on web map, zoom into the desired location. Select the data layer to add the data point to in the create features area of the editor pane (figure 37).

   The cursor will turn into a cross that allows you to place a new data point on the web map. Place the cursor over the desired location and click.
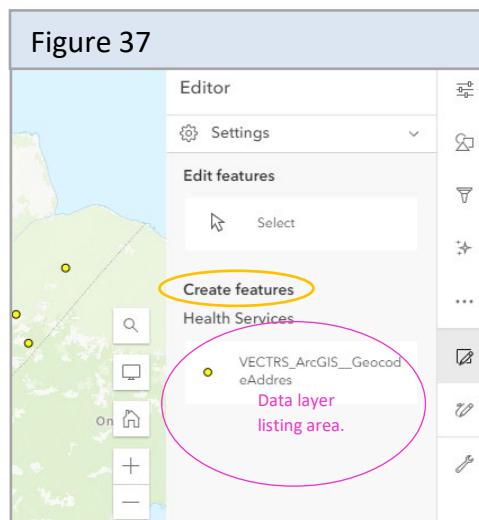
Figure 37

12. The create feature pane will open up. The user can now add data and values for the new data point.

Press the keyboards **tab key** to move between record boxes.

To submit the new data layer, click on **Create** in the create features pane (figure 38).


Figure 38 – Create feature pane
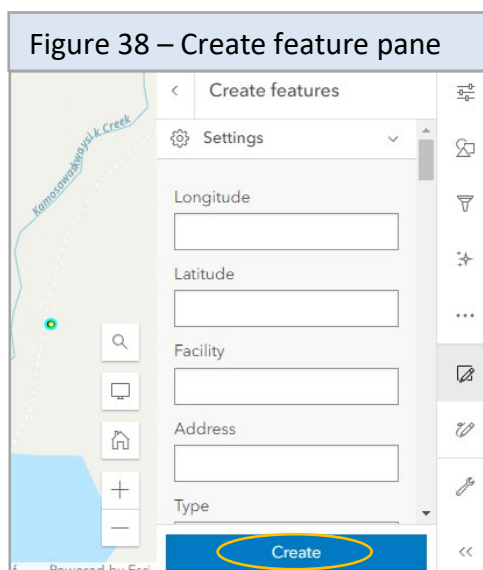
Adjusting font size and style

1. To adjust the font size and style, click on the icon with the users initials and select **Settings** (figure 39).

2. Under settings, select **Text** (figure 40) to open up text settings.

   - Users can adjust the font size using the **Scale slider bar** (figure 41).
   - Users can adjust the font style using the **Font** section (figure 41).

   The text preview under the scale slider updates in real time to display what is currently selected.

3. Click twice on the ◁ **back icon** (figure 41) to return to the survey gallery.

Figure 39

Figure 40 - Settings

Figure 41 – Text properties
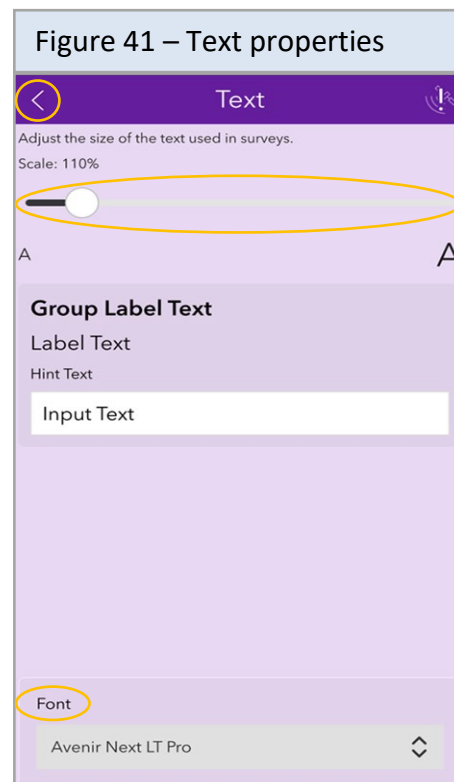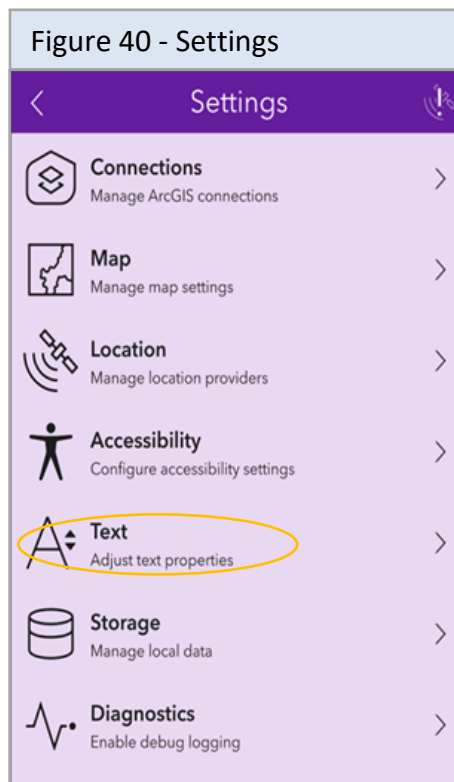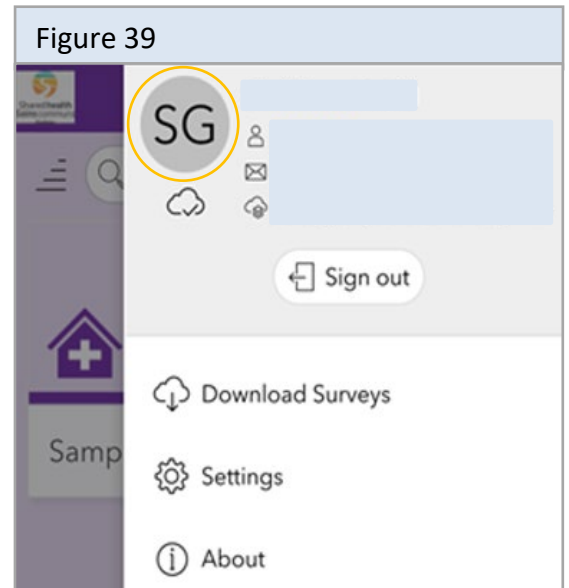
Updates Available Notification

If on opening the Survey123 app an **Updates available** (figure 42) option is at the top of the survey gallery, click on it. This will open the **Update Surveys** page (figure 43).

To update the survey there are two options (figure 43):

1. Select the ⟳ **Update Icon** for each survey requiring an update.
2. Select the **Download Updates** option at the bottom of the page.

After the update is completed, select the **back** icon to return to the survey gallery.

Figure 42 – Updates available	Figure 43 – Update Surveys
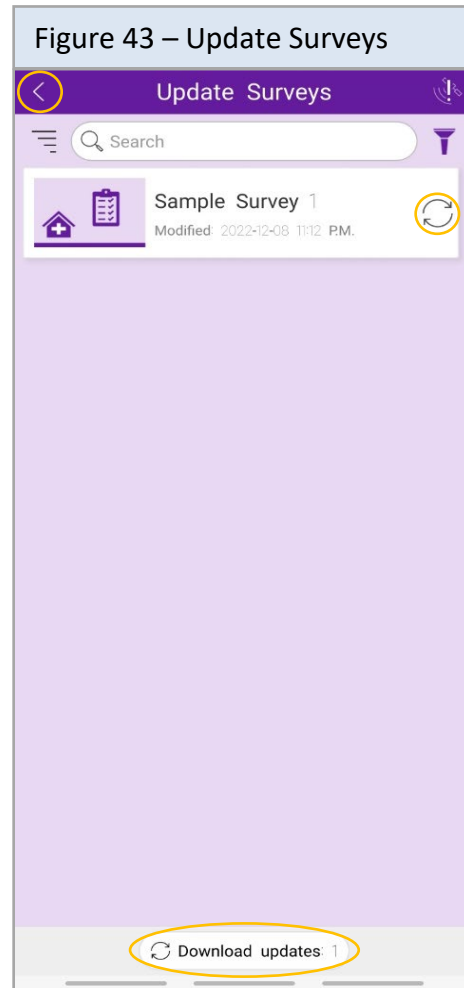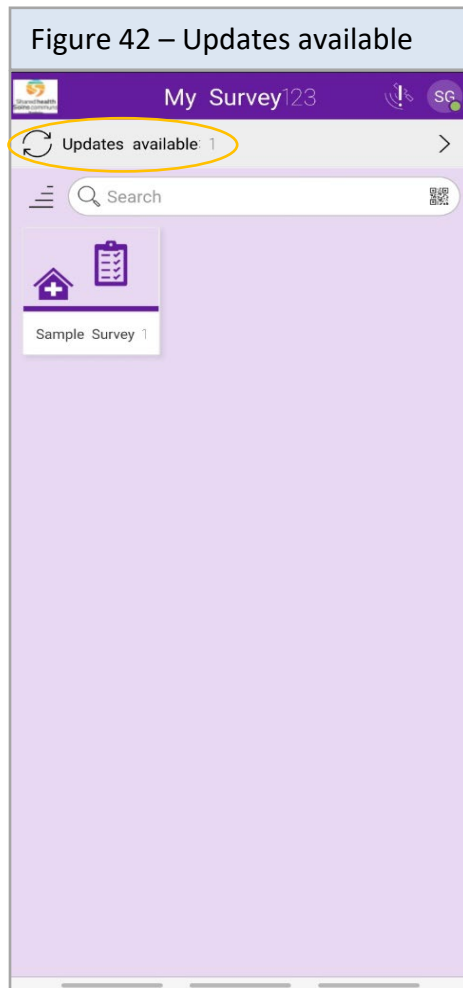
Location Inaccessible Warning

If on opening the Survey123 app a user encounters the **Location Inaccessible** (figure 44) warning screen, select **Close.**

Figure 44