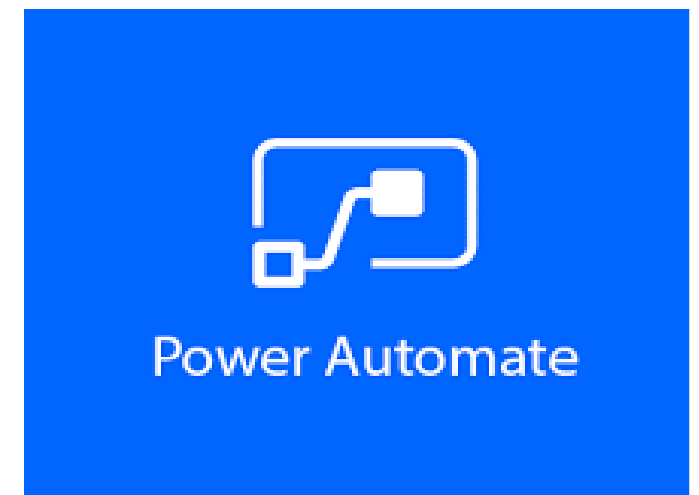
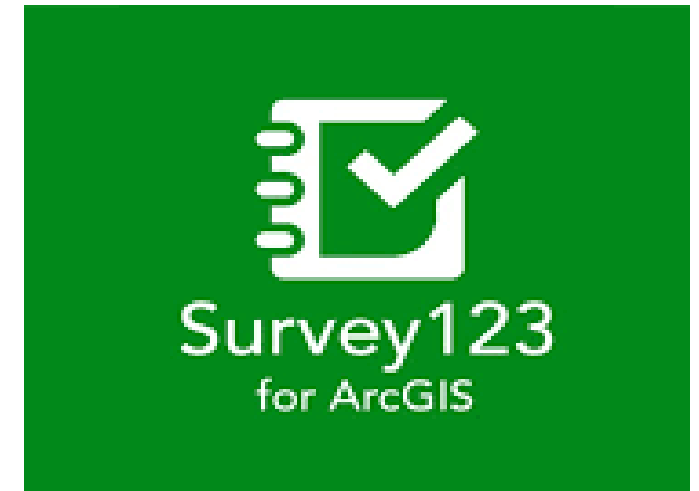


An Introduction to Workflow Automation Using Survey123 & Power Automate

Tom Maggard
Banning Engineering



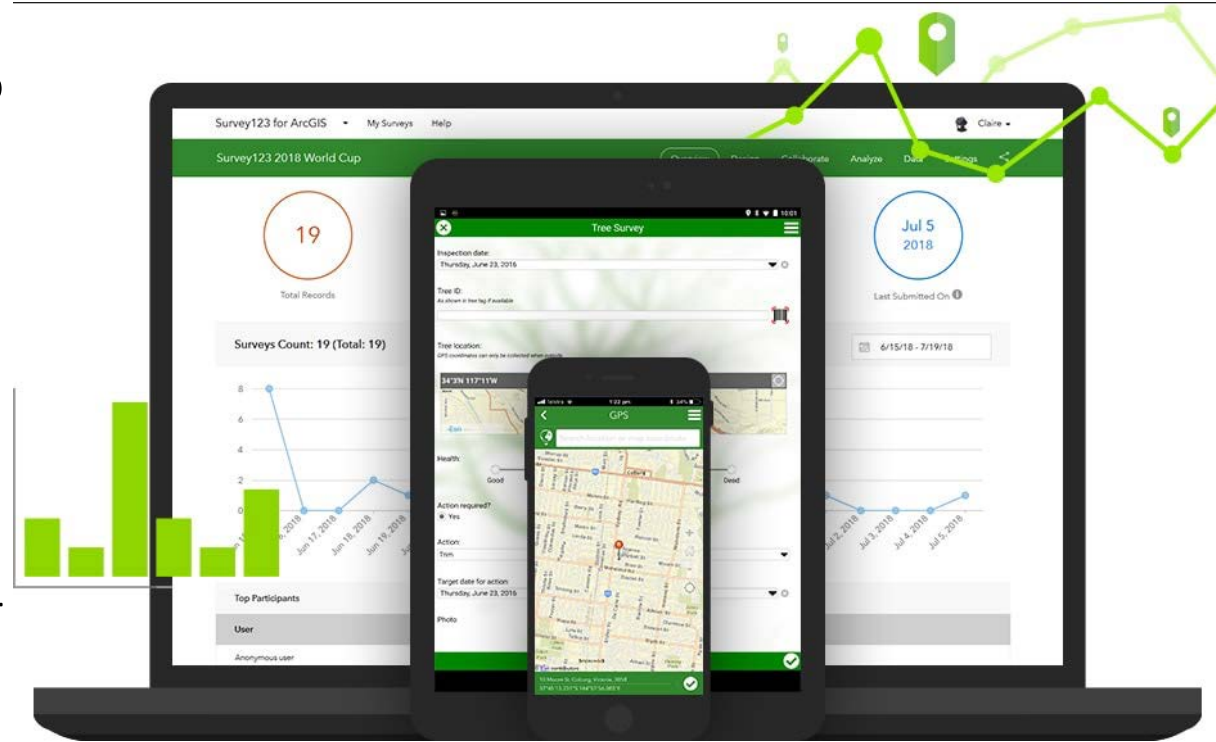
OUTLINE

- Survey123
- Power Automate (Microsoft Flow)
- Webhooks
- Live Demo
- Questions



SURVEY123

- Quickly create powerful surveys
 - Use the Survey123 website or the Survey123 Connect desktop app to create robust surveys
 - Both apps publish simple to complex surveys into ArcGIS.
- Get answers from anywhere
 - In any environment and with minimal training, use the Survey123 web app and mobile app to record survey answers on the desktop or mobile devices.
- Analyze results to make better decisions
 - Analyze answers in real-time to support decision-making
 - View summary analysis right in the app
 - Perform deeper analysis of Survey123 data in ArcGIS.



<https://www.esri.com/en-us/arcgis/products/arcgis-survey123/overview>

SURVEY123

New survey

2 ways to create new survey

- Web Designer
 - Drag-and-drop editing
 - Stored online 'immediately'
 - Use if not comfortable with 'coding'
- Connect
 - More form capabilities
 - Create on desktop and uploaded online
 - More intricate setup

Using the web designer

- Start from scratch
- Design your own survey
- Use a drag-and-drop editor



Get started

Using Survey123 Connect

- Use a desktop application
- Full smart form capabilities
- Edit an XLSForm spreadsheet



Get started

SURVEY123

Survey123/Power Automate demo

Description content for the survey

Name*

please enter your name

email

please enter an email address

Set rule

Show selected questions only if the answer to this question is a specific choice.

If

Show

-Please Select-



-Please Select-



Tip: Currently, rules are only supported by Single Choice, Dropdown, Likert and Rating questions.

Web Designer build options

- Can make questions required
- Allow set rules, on certain question types



Add



Edit



Appearance



Options



Singleline Text



Multiline Text



Single Choice



Single Choice Grid



Multiple Choice



Dropdown



Rating



Likert



Number



Date



Time



Date/Time



Image



File Upload



Map



Ranking



Email



Website



Signature



Note



Group

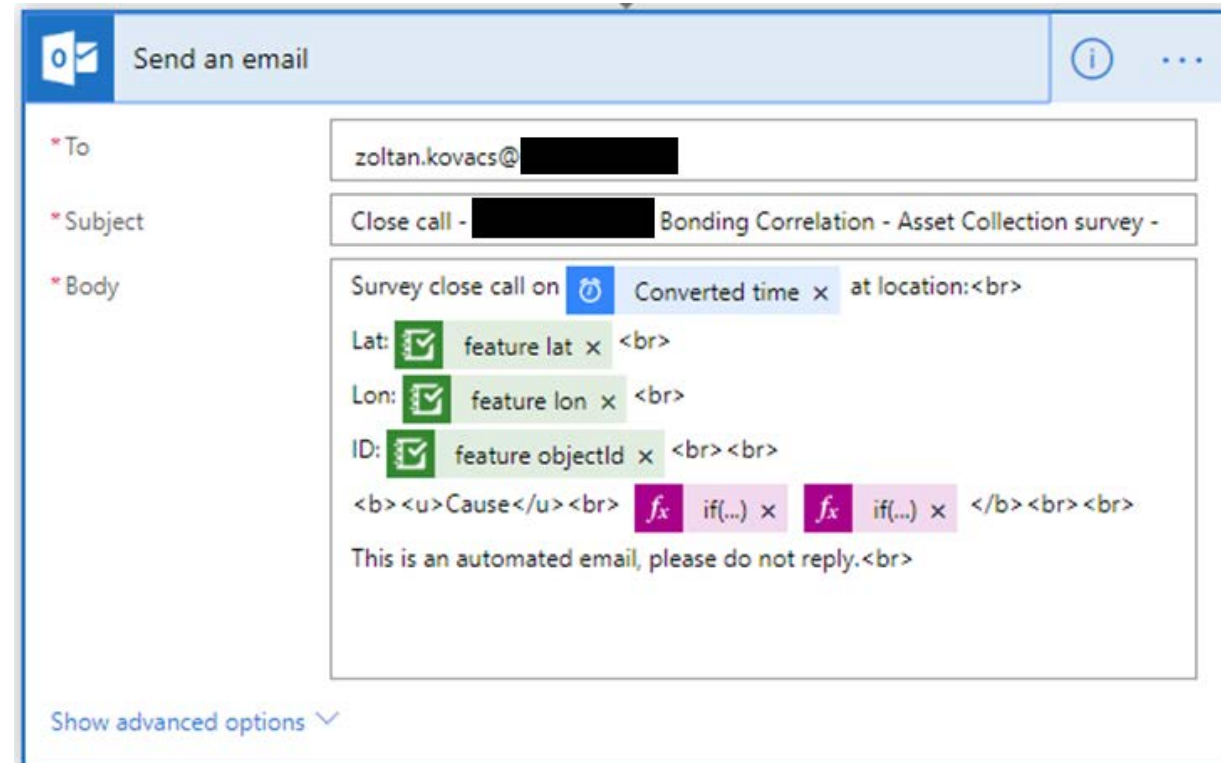
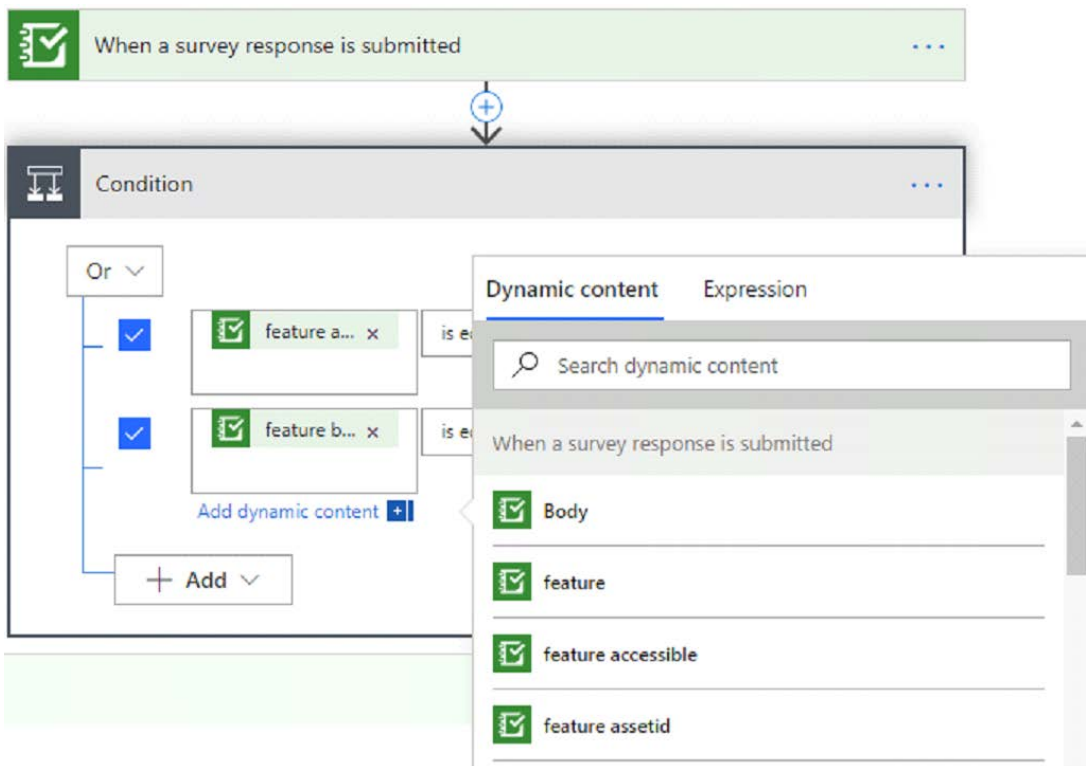


Page

SURVEY123

In Survey123 for ArcGIS, webhooks can be set up and activated when a survey response is submitted.

[Oct 2019 article about creating Webhooks with Survey123 & Microsoft Power Automate](#)



SURVEY123

Survey123/Power Automate demo



OverviewDesignCollaborateAnalyzeDataSettings

Version

Webhooks

Webhooks allow external services to be notified when certain events happen within your survey. For example, when a new record is submitted to your survey, a webhook can trigger an email notification through a mail server. For more information, please see [Getting started with webhooks in Survey123](#).

Add webhook

Name	Last modified	Status	Operations
MicrosoftPowerAutomate-ee537dfd0832453e9f1b9f9a720eefcf	Oct 27, 2020, 8:37:54 AM	On	 

Webhooks are generated once a Power Automate flow is created

Have the capability to
create your own webhook

Add webhook

A POST request will be sent to the payload URL below with selected details of any subscribed events.

Name *

Payload URL *

Trigger events

☒ New record submitted

☐ Existing record edited

Event data

Include following information in the payload

☐ Survey info ?☐ Server response ?☐ Submitted record ?

☐ User info ?☐ Portal info ?

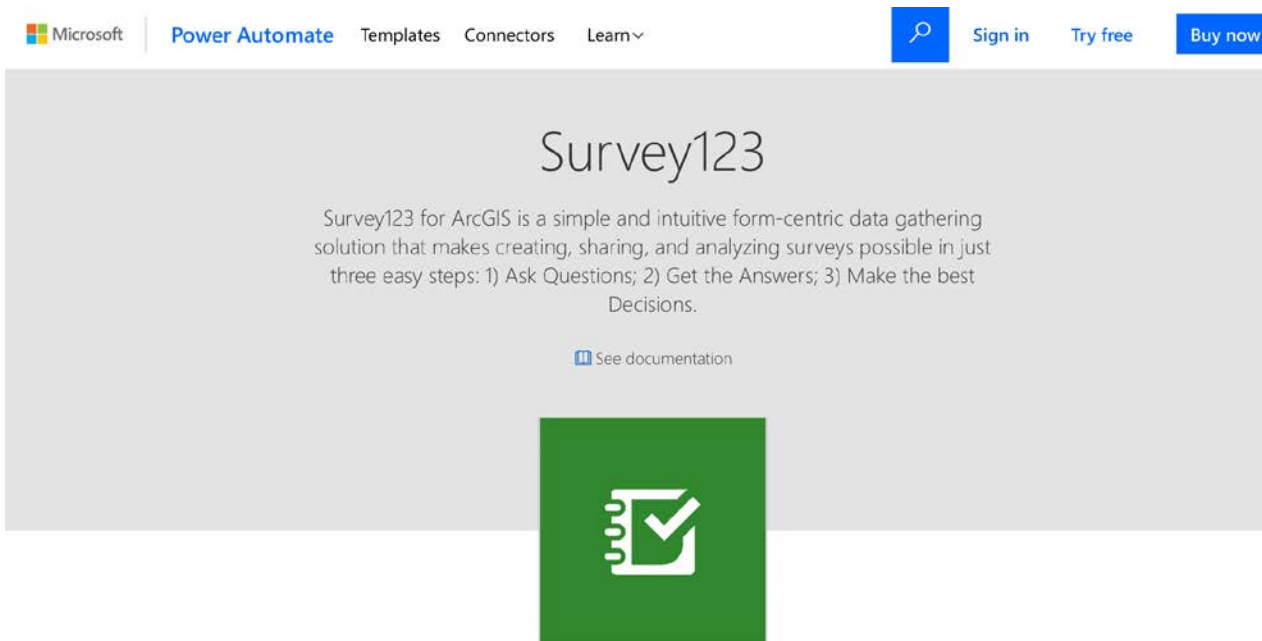
Status

☒ On

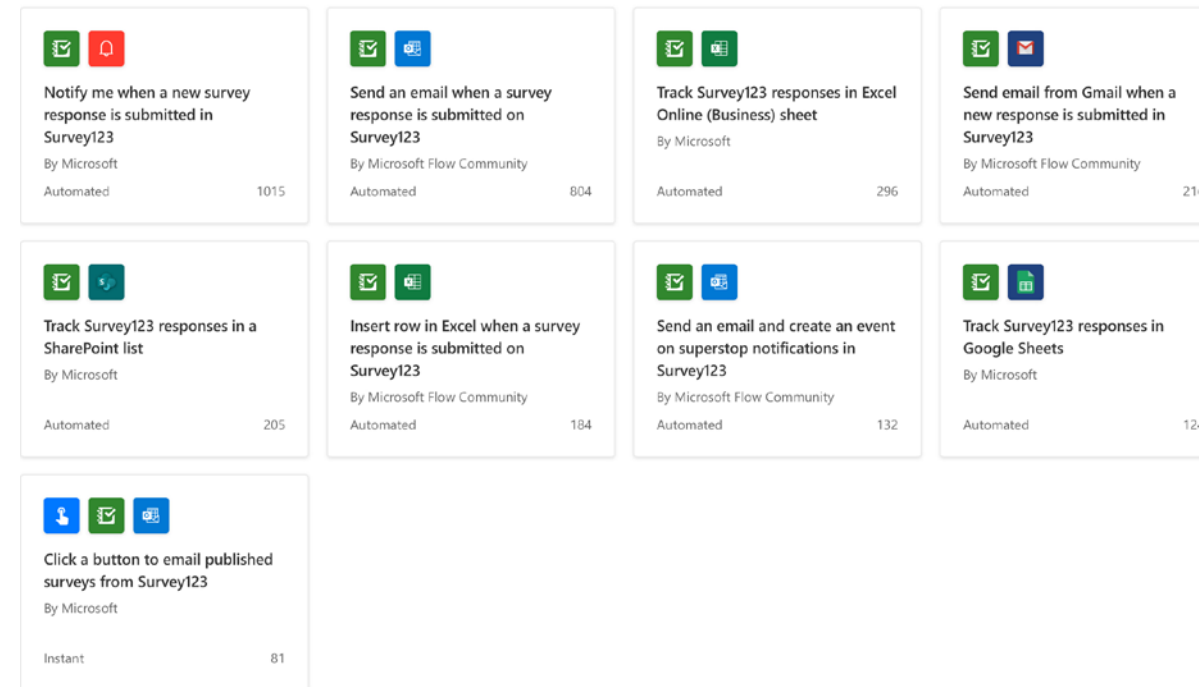
BANNING
ENGINEERING

POWER AUTOMATE

'Streamline repetitive tasks and paperless processes with Microsoft Power Automate—so you can focus your attention where it's needed most.'



The screenshot shows the Microsoft Power Automate website. At the top, there's a navigation bar with the Microsoft logo, 'Power Automate' text, and links for 'Templates', 'Connectors', and 'Learn'. There are also buttons for 'Sign in', 'Try free', and 'Buy now'. The main content area features a large card for 'Survey123'. The card has the title 'Survey123' and a description: 'Survey123 for ArcGIS is a simple and intuitive form-centric data gathering solution that makes creating, sharing, and analyzing surveys possible in just three easy steps: 1) Ask Questions; 2) Get the Answers; 3) Make the best Decisions.' Below the description is a link 'See documentation' and a large green icon with a white checkmark and a document symbol.



A grid of ten Power Automate templates for Survey123. Each template card includes an icon, a title, a description, the creator, the type of automation, and the number of views.

Template Title	By	Type	Views
Notify me when a new survey response is submitted in Survey123	By Microsoft	Automated	1015
Send an email when a survey response is submitted on Survey123	By Microsoft Flow Community	Automated	804
Track Survey123 responses in Excel Online (Business) sheet	By Microsoft	Automated	296
Send email from Gmail when a new response is submitted in Survey123	By Microsoft Flow Community	Automated	21
Track Survey123 responses in a SharePoint list	By Microsoft	Automated	205
Insert row in Excel when a survey response is submitted on Survey123	By Microsoft Flow Community	Automated	184
Send an email and create an event on superstop notifications in Survey123	By Microsoft Flow Community	Automated	132
Track Survey123 responses in Google Sheets	By Microsoft	Automated	12
Click a button to email published surveys from Survey123	By Microsoft	Instant	81

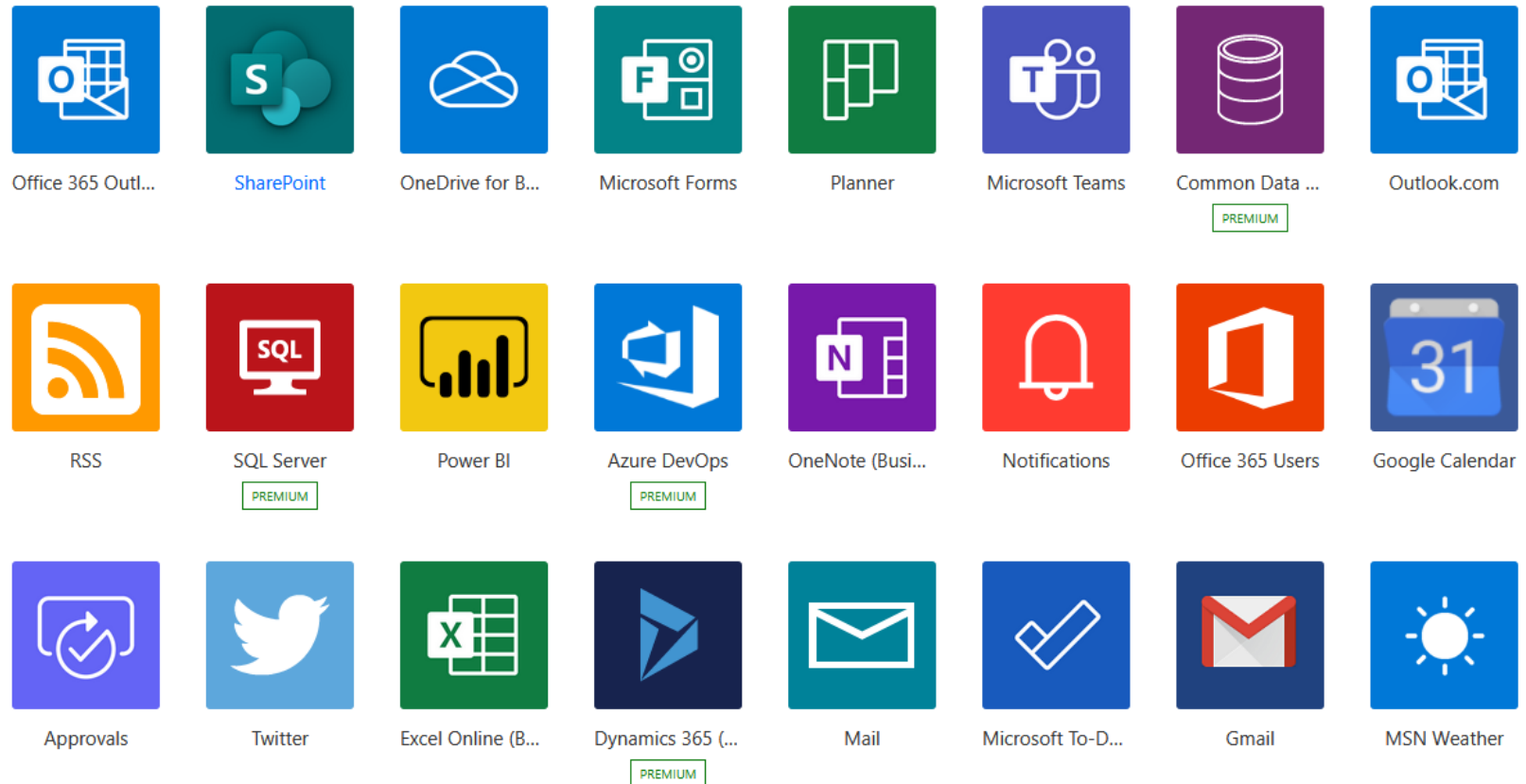
<https://us.flow.microsoft.com/en-us/>

POWER AUTOMATE

Connectors










‘A connector is a proxy or a wrapper around an API that allows the underlying service to talk to Microsoft Power Automate, Microsoft Power Apps, and Azure Logic Apps. It provides a way for users to connect their accounts and leverage a set of pre-built actions and triggers to build their apps and workflows.’

<https://us.flow.microsoft.com/en-us/connectors/>



POWER AUTOMATE

Templates
pre-built flow that's set up

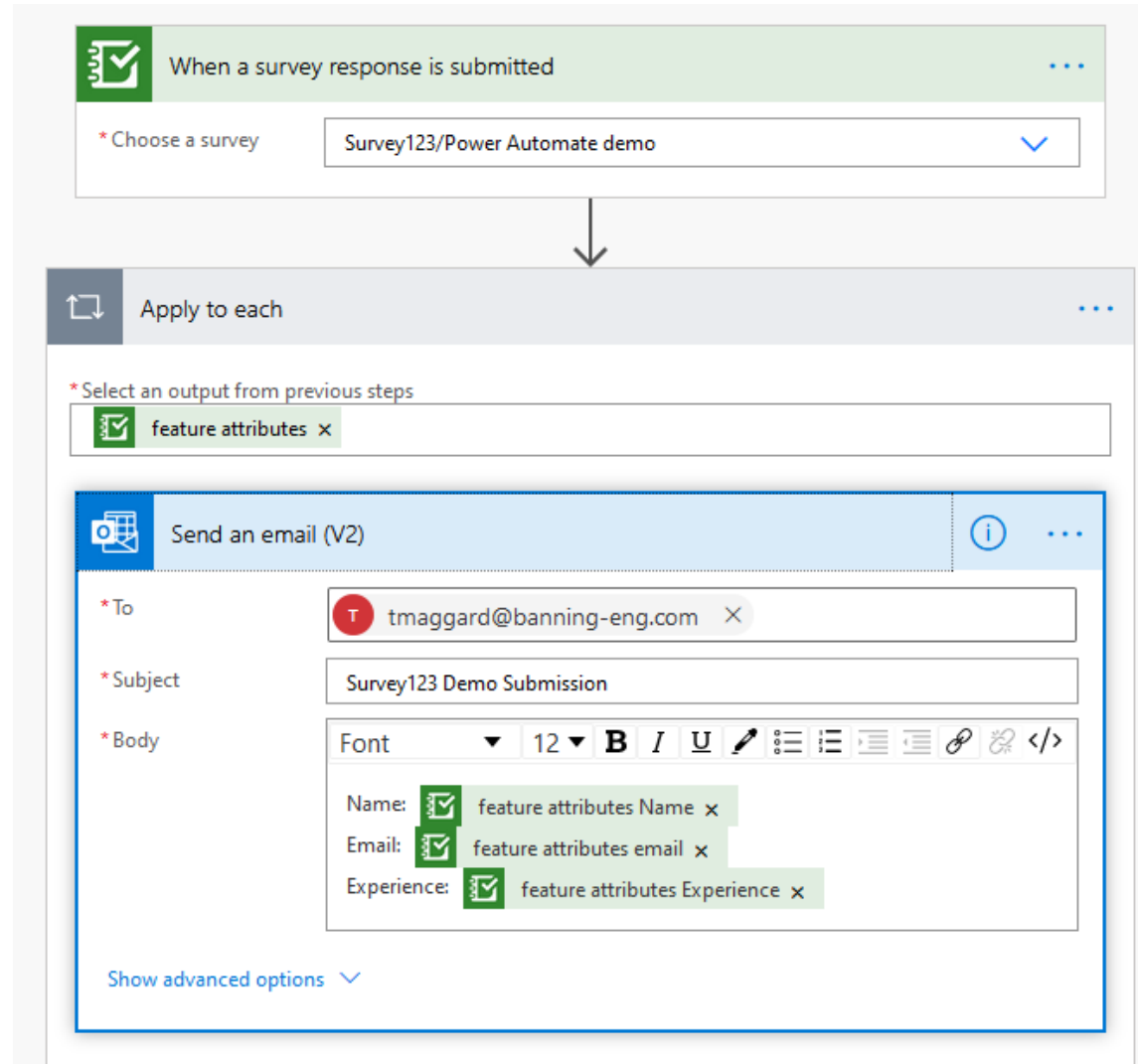
 <p>Notify me when a new survey response is submitted in Survey123 By Microsoft Automated 1015</p>	 <p>Send an email when a survey response is submitted on Survey123 By Microsoft Flow Community Automated 804</p>	 <p>Track Survey123 responses in Excel Online (Business) sheet By Microsoft Automated 296</p>	 <p>Send email from Gmail when a new response is submitted in Survey123 By Microsoft Flow Community Automated 214</p>
 <p>Track Survey123 responses in a SharePoint list By Microsoft Automated 205</p>	 <p>Insert row in Excel when a survey response is submitted on Survey123 By Microsoft Flow Community Automated 184</p>	 <p>Send an email and create an event on superstop notifications in Survey123 By Microsoft Flow Community Automated 132</p>	 <p>Track Survey123 responses in Google Sheets By Microsoft Automated 124</p>
 <p>Click a button to email published surveys from Survey123 By Microsoft Instant 81</p>			

<https://us.flow.microsoft.com/en-us/templates/>

POWER AUTOMATE

Create Flow

1. Link to your Survey123
2. Set up the Connector components
3. Allow Survey123 data to be used in the Connector
4. Here is the Power Automate flow I've created for this webinar



DEMO

QUESTIONS



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