CLUSTER TRAINING FOR THE PROVINCIAL ROLL-OUT OF LGU INTEGRATED FINANCIAL TOOLS (LIFT)

Bayview Park Hotel Manila

Survey

- A facility that allows a user to collect non-financial data.
- Users can gather data through 5 question types: Single Textbox, Multiple Choice, Rating, Ranking and Comment.
- This is a 2-step process: (1) Create and publish the survey; (2) Answer the survey.

Data Analyst

1. Click **Data Analytics** > Survey > **Survey Form**.
2. Click **Add Record**.
3. Enter **Survey Title**.
4. Enter **Description**.
5. Enter **Instructions**.
6. Select **Respondents**
7. Select **Question Type**.
8. Click **Add Question**.
9. *Enter data for Fields* required by selected Question Type.
10. Click **Save, Preview, Publish**.
11. Click **OK**.

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Single

Question

Options
- [ ] Required
- [ ] isNumeric

*Length should be between 0 and 0

Multiple Choice

Question

Answer 1

Options
- [ ] Required
- [ ] Allow multiple selection of answer

Rating

Question

Options

Ranking

Question

Options
- [ ] Required

Comment

Question

Options
- [ ] Required

Message Box

The record was successfully saved.

✔ OK
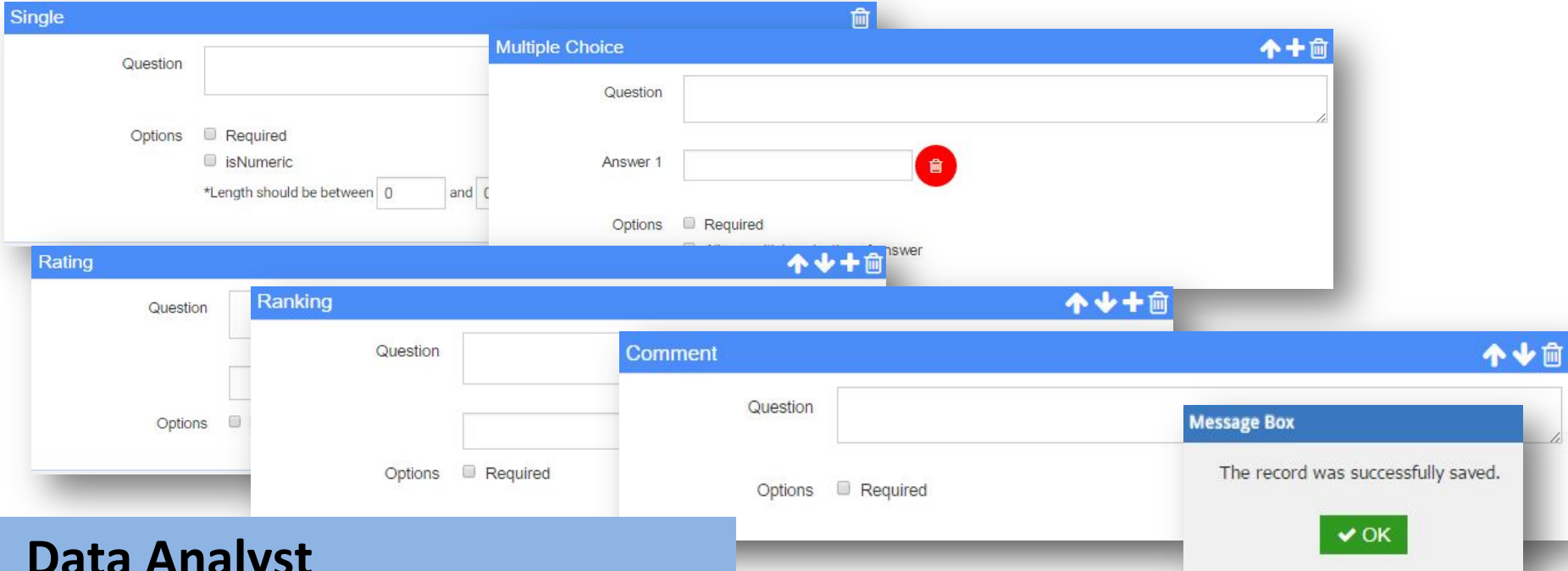
Data Analyst

📊 Data Analytics

● Survey

○ Survey Form

1. Click **Data Analytics** > Survey > **Survey Form**.
2. Click **Add Record.**
3. Enter **Survey Title.**
4. Enter **Description**.
5. Enter **Instructions**.

6. Select **Respondents**
Questions
1. Select **Question Type**.
2. Click **Add Question**. *Fields* will be displayed based on selected

Question Type.
3. Click **Save, Preview, Publish**.
4. Click **OK.**

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Data Analyst

1. Click **Data Analytics** > **Survey** > **Responses**.
2. Click **Edit** icon beside survey to be answered.
3. Answer the survey.
4. Click **Save**.
5. Click **OK**.

Survey Statistics

📄 Reports / Survey Statistics

📄 Generate

Survey Name — Select Survey Name ▼

Report Format — Select Report Format ▼

Data Analyst

📄 Reports ⌄

○ Survey Statistics

1. Click **Reports** > **Survey Statistics** .
2. Select **Survey Name.**
3. Select **Report Format.**
4. Click **Generate**. *Report* will be generated based on selected **Report Format.**

Reminders

- Users need to publish the survey before anyone can answer.
- Only those users granted with the authorized role shall be able to answer a survey.
- Users can no longer access the survey after the survey end date.
- Users can extend the survey period by editing the survey end date.