

CAMPUS BUSINESS OFFICER
BENCHMARKING TOOL



Sponsored by



Quick Start Guide

This guide describes how to get started in the tool.
View the following pages for illustrated descriptions on how to enter data,
view question comparisons and run dynamic reports.

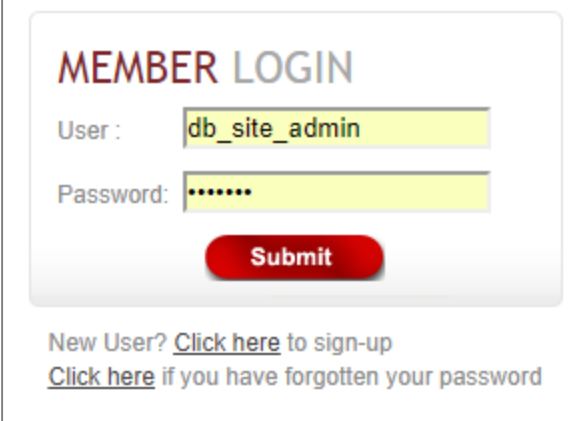
Website: <https://benchmarking.sacubo.org>

Questions? resource@sacubo.org

Don't have an account? Email resource@sacubo.org today!

Accessing the Tool

- New Users
 - Follow the link on the login page to sign-up for an account.
 - Once you complete the sign-up form, you will be brought immediately into the platform.
- Tool Access
 - Benchmarking website: <https://benchmarking.sacubo.org>
 - You can log in and out of the platform as often as you wish, entering your user & password information for login.
 - This is a single solution where you will enter data and access results.
- Browser Support - All browsers for Windows 7 or above are fully supported as follows:
 - Use the recommended browser settings for security and cookie settings. Cookies must be enabled to support the logging in process.
 - Internet Explorer 10 or later - support for IE is going to be phased out when Windows 7 is no longer supported by Microsoft.
 - Edge – new browser that comes with Windows 10.
 - Chrome/Firefox/Safari – these browsers auto-update so the latest version should be used.



MEMBER LOGIN

User :

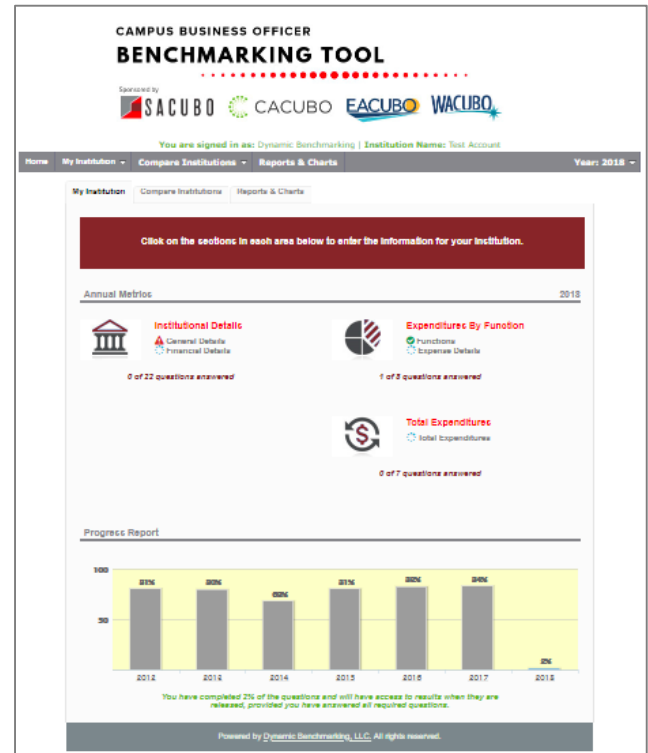
Password:

Submit

New User? [Click here](#) to sign-up
[Click here](#) if you have forgotten your password

Your Home Page

- **My Institution:** Answer the questions in the Tool.
- When results become available, they are accessed via:
 - **Compare Institutions** – View question by question comparisons
 - **Reports & Charts** – Download dynamic and personalized reports.



My Institution:

- Questions are carefully organized into categories & subcategories.
 - Select any subcategory to view and answer questions.
- Questions can be answered in any order.
- Status icons next to each subcategory indicate your progress.
 - ✓ All questions have been answered, no further action needed.
 - No questions in this group have been answered.
 - ⊙ Some questions have been answered but more answers are needed.
 - ⚠ There are unanswered “required” questions.
 - ⚠ There is a numeric question with an answer outside of a defined range.
- Your overall progress can be tracked through the progress graph & messaging at the bottom of the page.

Benchmarking Support

- Once you have logged in, click on the **Support** link in the top right corner of your platform to access support documentation and contact information.

Managing Your Account

From the “My Account” page, you can:

- Change your password
- Add/manage account users
 - Account administrators can add new users as well as manage existing users in your account through the **My Account** link at the top of the home page. The **User** section of this page will only display if you have administrator permission for your institution.
 - Add new user contact information and set user permissions:
 - Administrator: Company Setup access, as well as read-write permission.
 - Read-Write User: Can enter data & access results.
 - Read-Only User: Can view results but cannot add or edit data.
 - Write-Only: Can add or edit data but cannot access results.
 - New users will immediately receive an email with their user name and log-in instructions. Occasionally these emails are caught by spam filters, so be sure to check spam/junk folders.
- Review the Terms of Use, Privacy Policy, and Cookie Policy.
- Delete your account.

★Welcome Message★ | **My Account** | Support | Logout

Contributing Data for Multiple Accounts

- If you are reporting data for more than one company, the benchmarking support team can help you set up additional accounts. Email support at resource@sacubo.org.
- To switch from one account to another, click on the **Current Account** dropdown menu at the top of the home page to select the account.
- Always check the account you are in before entering or updating your data.

Current Account: Test Account ▼

★Welcome Message★ | My Account | Company Setup | Support | Logout

Entering Your Data

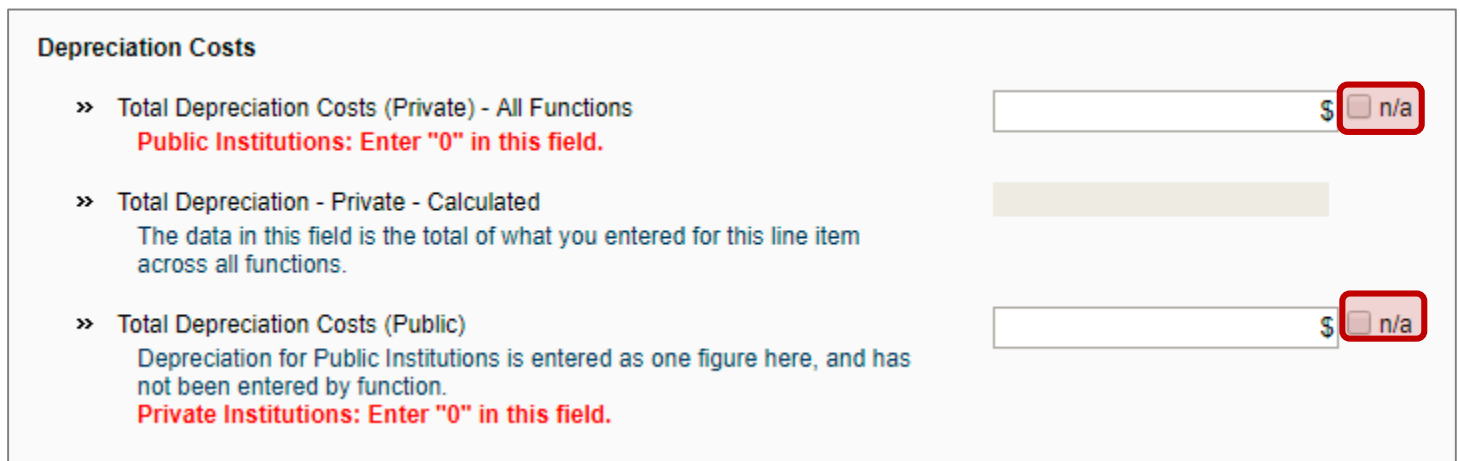
- As you enter data, the entry box turns green, indicating that new data has been provided and must be saved by clicking the **Save** or **Save & Next** button at the bottom of every page.
- To abandon or discard newly entered data, click **Cancel**.
- Any required questions are noted with a large, red asterisk *****.



>> Institution Designation *

>> Reporting System *

- Some questions have the option of checking **n/a**, indicating that the question does not apply to you. Selecting **n/a** counts towards your overall survey progress.



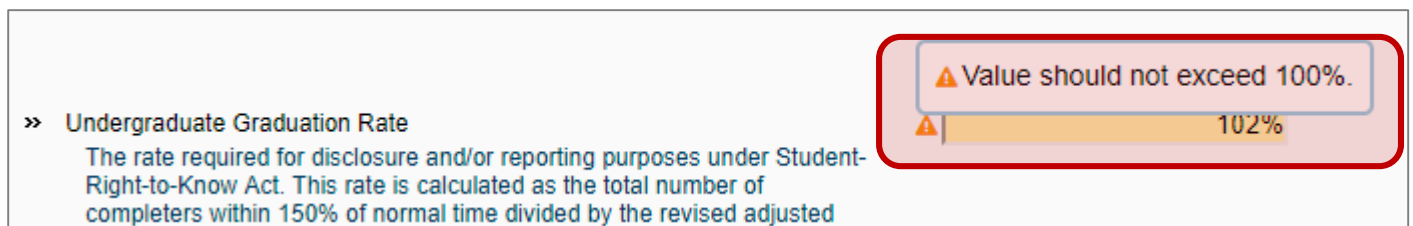
Depreciation Costs

>> Total Depreciation Costs (Private) - All Functions \$ n/a
Public Institutions: Enter "0" in this field.

>> Total Depreciation - Private - Calculated
The data in this field is the total of what you entered for this line item across all functions.

>> Total Depreciation Costs (Public) \$ n/a
Depreciation for Public Institutions is entered as one figure here, and has not been entered by function.
Private Institutions: Enter "0" in this field.

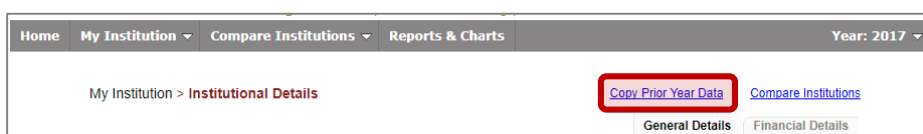
- Some numeric questions are set with expected answer ranges. If you enter a value outside of the expected range, you will see a warning sign appear. You will be able to save this data, but it will be flagged as being out of the expected range.



>> Undergraduate Graduation Rate
The rate required for disclosure and/or reporting purposes under Student-Right-to-Know Act. This rate is calculated as the total number of completers within 150% of normal time divided by the revised adjusted

▲ Value should not exceed 100%
▲ 102%

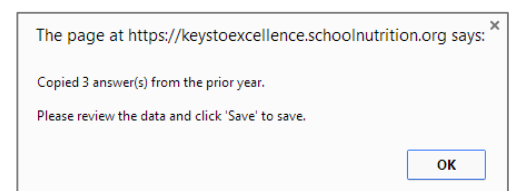
- In subsequent years of data entry, select **Copy Prior Year** to pull forward your previous year's data. If you have already started data entry, using this option will not overwrite your current saved answers.
- A pop-up box will tell you how many answers were copied from prior year. Click **OK**, return to the page, modify any data as necessary. Then click **Save** at the bottom of the page to save your answers before moving forward.



Home My Institution Compare Institutions Reports & Charts Year: 2017

My Institution > Institutional Details [Copy Prior Year Data](#) [Compare Institutions](#)

General Details Financial Details



The page at <https://keystoexcellence.schoolnutrition.org> says: ×

Copied 3 answer(s) from the prior year.

Please review the data and click 'Save' to save.

OK

Expenditures by Function Data Collection

The Expenditures by Function section is set up to make it easy to answer the same series of questions for multiple functions.

- On the **Functions** tab:

- Select the functions for which you will be reporting, then click **Save & Next** to answer questions for each function you selected.

>> Indicate the functions for which your institution is reporting

[The Glossary of Function Definitions](#) is available to assist you in choosing which functions you should be reporting on for your institution.

Private Institutions: Please enter O&M of Plant and Depreciation expenses as you report them on your institution's financial statement. However, for comparative purposes, we are also asking you to report Employee FTEs, Compensation & Benefits, and Other costs for O&M separately. These O&M costs will be reported twice, however, they will not be double counted in any expense totals.

- Instruction
- Research
- Public Service
- Academic Support
- Student Services
- Institutional Support
- Hospitals
- Operations & Maintenance of Plant
- Scholarships & Fellowships
- Auxiliary Enterprises
- Independent Operations

Save Cancel **Save & Next >**

- On the **Expense Details** tab:

- The dropdown box displays the function(s) you selected on the previous page.
- Answer the questions for the function displayed.
- Click **Save & Next** at the bottom of the page to save your answers and move to the next function in the list.
- Continue in this manner until you have answered all the questions for every function in the dropdown box.
- Review your answers for any function by selecting it in the dropdown list at any time.
- When you have answered all the questions, click **Save & Next** to continue with the survey.
- If at any time you wish to clear the data for a function, simply return to the list of functions, uncheck that function, and click **Save** at the bottom of the page, clearing all data previously entered for that function.

Choose which item you would like to edit... **Instruction**

Select each option from this list to fill in the answers for that option.

Total Employees

- Full Time Equivalent (FTE) Employees
Enter the number of FTE Employees in this function. Employees who are less than full time should be counted as a percentage of full-time. For example, an employee who works 30 hours/week, 12 months/year should be counted as .75 FTE. Student Employees: Inclusion or exclusion of student employees is institution-dependent. Institutions which rely on student employees as part of their regular workforce should include them in their FTE employee counts. Institutions which employ students primarily in work-study type positions should exclude them from their FTE employee counts.

Total Function Costs

- Total Function Costs
Public Institution: Compensation, Benefits and Other Costs
Private Institution: Compensation, Benefits, Other, Operations & Maintenance of Plant, and Depreciation.

Detailed Function Costs

- Compensation & Benefits
- Other Costs
When reporting on the **function of Operations & Maintenance of Plant**, do not include depreciation.

The following items apply to Private Institutions. Public Institutions, enter "0" in each of the fields below. "0" will be excluded in comparison charts and reports.

- Operations & Maintenance of Plant n/a
PRIVATE INSTITUTIONS: When reporting on the **function of Operations & Maintenance of Plant**, enter "0" in this field.
- Depreciation by Function n/a
PRIVATE INSTITUTIONS: When reporting on the **function of Operations & Maintenance of Plant**, enter "0" in this field.

Total Function Costs - Verification
This field is automatically calculated after you click the save button below. The difference shown here should be zero, confirming that your Total Function Costs by line item equal what you entered above.

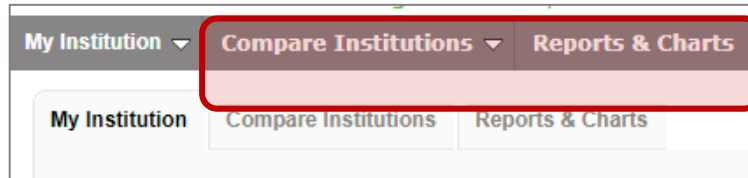
Total of Above: \$9,000,000
Expected Total: \$10,000,000
Difference: \$1,000,000

Save Cancel **Save & Next >**

Accessing Results When Available

When released, results will be available for all users who answered all required questions and completed a minimum 70% of all questions.

- Results are available in two formats via **Compare Agencies** and **Run Dynamic Reports**.
 - **Compare Agencies:** See how you compare to other participants for every question in the survey.
 - **Run Dynamic Reports:** Download personalized, dynamic reports.

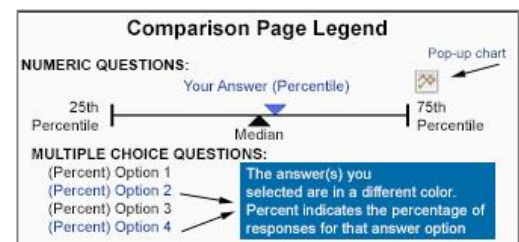


- To ensure data anonymity, all results are aggregated and a minimum of 5 data points is required, even when filters are applied.

Question by Question Comparisons

- Numeric results are presented in quartiles, values that divide a list of numbers into quarters:

- 25th Percentile/first quartile: 25% of the data fall below this percentile.
- 50th Percentile/median: The median represents the middle number where 50% of answers are lower and 50% are higher.
- 75th Percentile/third quartile: 75% of the data fall below this percentile.



- Multiple Choice results are reported with the percentage of answers associated with each response option for that question.
- Unless a chart is presenting multiple pieces of data (such as in a pie chart), your responses will be presented in **burgundy**.
- Click on the icon to the right of each comparison result to view the data in a chart, which can then be saved as either PDF or PPT.



Using Filters

Filters allow you to drill down and compare your answers to a subset of respondents. All results continue to be aggregated with a minimum of 5 data points, even when filters are applied. *Screenshots below are examples, your filters will be unique to your platform.*

- Click **Edit** to activate the filters.
 - **Numeric filters:** Click **Add** to activate sliders. Use slide bar to set a numeric range by moving the blue squares or enter a number in boxes.
 - **Multi-select filters (if available):** Check the items you wish to include.
 - **Single-select filters (if available):** Choose from the drop down menus.
- Watch the filter message change as you select filters. A warning message will display when you have filtered too far to return results.
- If your filters do not return enough responses, change your filter settings by:
 - Widening the range of a numeric filter.
 - Turning off a numeric filter by clicking the **X**.
 - Returning a multiple choice filter to **Any**.
 - Click **Clear** to start over and select different filter options.
- When you have the filter settings you desire, click **Done** to close the filter area.
- Once you have found a filter setting that works for you, save it as a filter favorite to easily use again.

Filter: Numeric Filter
Value: Any
Edit

Filter: Numeric Filter
Value: 0 to 50M
Multiple Select Filter: Answer 1, Answer 2, Answer 3
Single Select Filter: Any
Done, Clear

Filter: Value
Edit, Save As Favorite..., Filter Help

Filters will carry forward onto subsequent compare pages as well as the reports page, until they are cleared.

Peer Cluster Filters

Peer Cluster filters allow you to select a group of five (5) or more participating accounts for your comparison data set.

- Click **Edit** to activate the filters.
- Click **New** to create your peer cluster. (Note: If **New** is not available, you do not have permission to create a Peer Cluster but you can still select a pre-configured Peer Cluster in the dropdown.)
- Name your Peer Cluster, then click **OK**.
- Select your comparison accounts from the list of companies, then click **Save**.
- In the Peer Cluster drop down, select your saved cluster.

Recommendation: Deactivate all other filters before using peer clusters.

Filter: Numeric Filter, Multiple Select Filter, Single Select Filter, Peer Cluster
Value: + Add...
Any, Answer 1, Answer 2, Answer 3
Any, + New...
Save, Cancel

Personalized, Dynamic Reports

From **Reports & Charts**, click on a report name to download your personalized report.

- **PowerPoint** reports display data in charts and graphs, including year-over-year and multi-year trend charts.
- **Word** reports display data in tables with summary details.

Generate Reports...

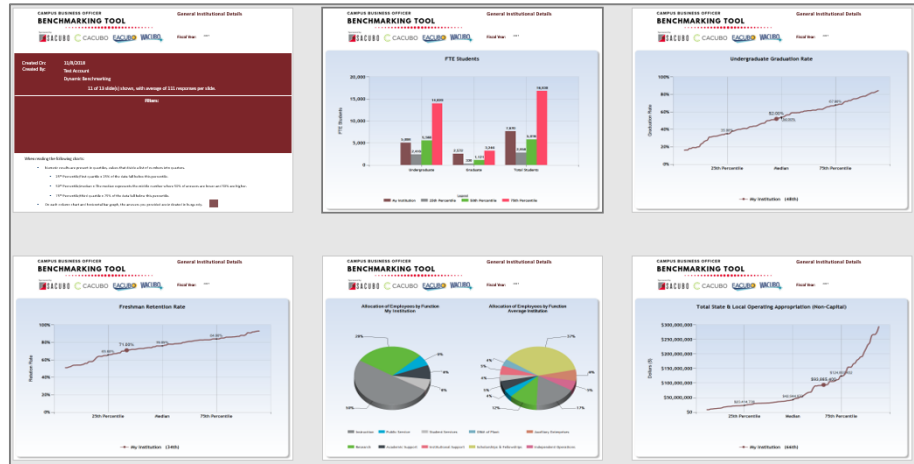
- W
» Executive Summary
 The Executive Summary provides an overview of Revenue & Asset, Expense, Employee, and Effectiveness Benchmarks.

- P
» General Institutional Details
 The General Institutional Details report provides a variety of charts using the data collected in Institutional Details.

- P
» Total Expenditures - All Functions
 The Total Expenditures report provides a charts for each Total Expenditures by line item.

Use filters to get the most out of your results.

Filters applied to question by question comparisons will carry forward into reports until they are cleared.



How Data is Displayed in Multi-Year Trend Charts

Trend chart reporting follows the minimum number of accounts and data points required by the platform to display results. For example:

- Five (5) accounts must meet the filter criteria set.
- Five (5) data points are required for EACH trend year.
- In the example shown:
 - The minimum number of accounts (5) was met to display the trend report.
 - The minimum number of data points (5) was NOT met for this data point in years 2012 & 2013. Therefore, no trend values/dots are shown for 2012 & 2013 on the chart.
 - The minimum number of data points (5) WAS met for 2014, 2015, 2016 & 2017, and trend values/dots are displayed for these years.

*If there is not enough data for a **specific year**, that year will not display a trend value/dot.*

If the first or last year do not have enough data points, then the trend line will not be drawn to that year.

