

Quick Start Guide

SACUBO Benchmark Study

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SACUBO

 **Cherry Bekaert^{LLP}**
CPAs & Advisors

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Getting Started

▶ Overview

- This guide describes how to get started with your survey.
- View the following pages for illustrated descriptions of how to enter data, view comparisons and run reports.

▶ Logging in

- Enter the URL for your benchmarking platform - <https://benchmarking.sacubo.org>
- Past survey participants, use the username provided in your invitation email, and the password you have set.
- New survey participants, follow the link below the login box to sign-up and create an account, establish a user name and password.
- Login/logout of the platform as often as desired.

▶ 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.

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Logging In

If you participated in 2012,2013, or 2014, click on the link provided in your survey invitation email:

- ▶ Use your email address as your username
- ▶ You will be prompted to set up a password

If you did not participate in any of these years, click on the link provided in your survey invitation email, and complete your account set up using the Sign Up form.

Lost or forgotten passwords are easily reset on the login screen.

MEMBER LOGIN

User :

Password:

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

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Main Menu

The Main Menu is the access point to navigate through all areas of your survey.

Tab & Menu Navigation:

- ▶ Data Entry (My Institution) is the tab for answering all of the questions in your survey.
- ▶ Comparison (Compare Institutions) is the tab for comparing your answers to other participants on a question by question basis.
- ▶ Reports (Reports & Charts) is the tab for downloading dynamic reports containing statistical charts and graphs.

Questions

- ▶ Click on the gray question groups to begin entering your data points.

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Account Switching

If you are reporting for more than one institution, an account will be created for each institution so that data can be provided individually. If your user name is associated with multiple institutions, you will be able to switch between these accounts (account switching) using the dropdown menu on the platform.

To switch from one account to another, click on the dropdown menu to select the account.

Best practice: always be sure you are in the correct account before entering data.



The screenshot shows the top navigation bar of the SACUBO Benchmark Study platform. On the left, it says "Current Account: Institution 3" with a dropdown arrow. On the right, it says "My Account | Company Setup | Support | Logout". Below this is a large banner with the text "2015 SACUBO Benchmark Study Powered by Cherry Bekaert LLP" and the SACUBO and Cherry Bekaert logos. At the bottom, there is a dark blue navigation bar with the following links: "Home", "My Institution" (with a dropdown arrow), "Compare Institutions" (with a dropdown arrow), and "Reports & Charts".

If you don't see the account switching option and think you should have access to more than one institution/account, please contact the SACUBO Benchmark Study support team at benchmarkingsupport@cbh.com.

Company Setup/Adding Users

Click on [Company setup](#) on the top right of your screen to manage users and account information.

- ▶ Only Administrators within an account will have access to this Company Setup page
- ▶ Add new users to your account
 - Enter user information and select permission level
 - **Read Only Users:** can't add or edit data
 - **Write Only Users:** can add or edit data but can't compare or download reports
 - **Users:** have full read and write privileges
 - **Administrators:** manage users and have full read/write privileges
 - New users will immediately receive an email with their user name, one time use password and log-in instructions
- ▶ Delete existing users
- ▶ Update current users

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Company Setup Example

Existing Users

User Name	Email Address	User Level
test	support@dynamicbenchmarking.com	Administrator

Add / Edit / Delete Users

Select User:

First Name:

Last Name:

Email Address:

User Level:

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Your Gateway Page

The screenshot shows the user interface for the 2015 SACUBO Benchmark Study. At the top, it displays 'Current Account: Institution 3' and navigation links for 'My Account', 'Company Setup', 'Support', and 'Logout'. The main header features the study title and logos for SACUBO and Cherry Bekaert LLP. A navigation bar includes 'Home', 'My Institution', 'Compare Institutions', and 'Reports & Charts'. Below this, a green banner instructs users to click on sections to enter information. The 'Annual Metrics' section for 2014 is divided into three categories: 'Institutional Details' (13 of 14 questions answered), 'Expenditures By Function' (55 of 55 questions answered), and 'Total Expenditures' (5 of 7 questions answered). A progress bar at the bottom indicates that 96% of questions are completed, with a note that 50% completion grants access to comparison and reporting information. The footer states 'Powered by Dynamic Benchmarking, LLC. All rights reserved.'

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Tracking your Progress

Track your progress by viewing the number of questions that you have answered for each question group.



A screenshot of a progress bar for the 'Institutional Details' section. On the left is an icon of a classical building with three columns. To the right of the icon, the text reads 'Institutional Details' followed by '>> Details'. Below this, a green progress bar is shown, with the text '13 of 14 questions answered' in green below it.

Track your overall progress by viewing the progress bar at the bottom of the gateway page.

- ▶ Your progress statement will indicate the minimum percentage completion for accessing comparison and reporting.



A screenshot of an overall progress bar. The bar is dark blue and is nearly full, with a small white segment at the end. Below the bar, the text reads: 'You have completed 96% of the questions. After answering 50% of the questions, you will have access to comparison and reporting information.'

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Question Organization

Questions are carefully organized into major categories.

- ▶ Each category has sub-categories called question groups.
- ▶ Institutional Details questions can be answered at any time.
- ▶ Expenditures by Function questions should be answered before Total Expenditures questions.



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Entering 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.

Total Employees	
» Full Time Equivalent (FTE) Employees Enter the number of FTE Employees in this function.	2,201.00
Total Function Costs	
» Total Function Costs Public Institution: Compensation, Benefits and Other Costs Private Institution: Compensation, Benefits, Other, Operations & Maintenance of Plant, and Depreciation.	\$ 172,648,101
Detailed Function Costs	
» Compensation & Benefits	\$ 94,269,781
» Other Costs When reporting on the function of Operations & Maintenance of Plant , do not include depreciation.	\$ 78,378,301
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 PRIVATE INSTITUTIONS: When reporting on the function of Operations & Maintenance of Plant , enter "0" in this field.	\$ 0
» Depreciation by Function PRIVATE INSTITUTIONS: When reporting on the function of Operations & Maintenance of Plant , enter "0" in this field.	\$ 0
» 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: 172,648,080 Expected Total: 172,648,100 Difference: 20
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Save & Next >"/>	

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Entering Data, cont.

The Expenditures By Function question group is “templated.” This makes answering the same series of questions very easy.

Select the functions for which your institution reports.

Then, click **Save & Next** to enter your data for each function you selected.

Main Menu > Expenditures By Function

Year: 2014 ▾

Functions Expense Details

Indicate the functions that apply to your institution.
[Click here for a glossary of function definitions.](#)

» Indicate the functions for which your institution is reporting

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 sperately.

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

Save Cancel Save & Next >

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Entering Data, cont.

1. The dropdown box displays the functions you selected on the previous page.
2. Answer the questions for the function displayed.
3. Click **Save & Next** at the bottom of the page to answer the questions for the next function.
4. Continue in this manner until you have answered all the questions for every function in the dropdown box.
5. Review your answers for any option by selecting it in the dropdown list at any time.
6. When you have answered all the questions, click **Save & Next** to continue with the survey.

Main Menu > Expenditures By Function [Copy Prior Year Data](#) [Compare Institution](#)

Year: 2014

Please enter details for each function selected on the Functions tab.
The first section should be completed by both PUBLIC AND PRIVATE institutions.
The second section should be completed by PRIVATE institutions only.

>> Choose which item you would like to edit...
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.

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
PRIVATE INSTITUTIONS: When reporting on the **function of Operations & Maintenance of Plant**, enter "0" in this field.

>> Depreciation by Function
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: 199,999,999
Expected Total: 200,000,000
Difference: 10

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Saving your Answers

- ▶ Choose **Save** to save your answers but stay on this page.
- ▶ Choose **Save & Next** to save your answers and proceed to the next survey section.
- ▶ Choose **Cancel** to abandon data.

Save

Cancel

Save & Next >

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Comparing Yourself to Your Peers

(Available After Data Collection Phase)

Click on the **Compare Institutions** tab or menu bar to access comparison data for all questions.

- ▶ Select any gray question group to access questions for comparison.

View on-demand popup charts by clicking on icon

- ▶ For numeric questions, get popup charts by clicking on this icon:
- ▶ For multiple choice questions, get popup charts by clicking on this icon:



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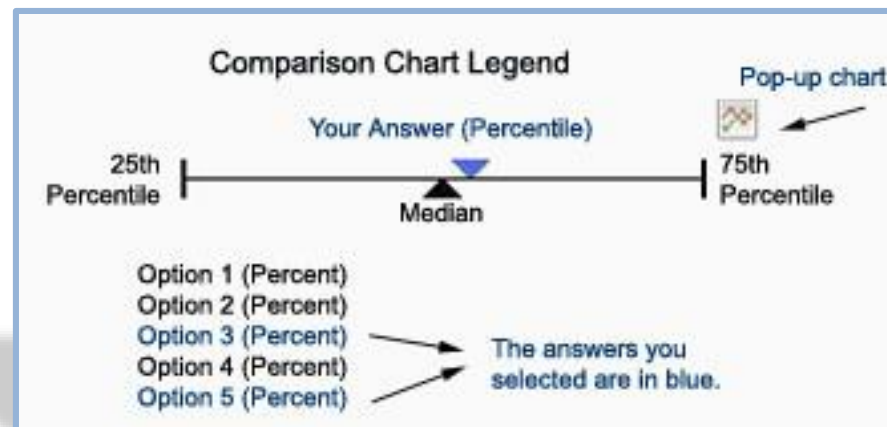
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Line Chart Legend

Understanding comparison results:

- ▶ **Multiple choice questions:** View all answer options with their associated percentages. Your answers are indicated in blue.
- ▶ **Numeric questions:** View a line chart displaying the 25th, median and 75th percentiles with your answer shown as a blue arrow above the line.



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Example of Comparison

General Details

>> Institution Category

Research: Public or independent research universities and medical schools/centers. Carnegie categories - Research Universities High (RU/H) and Research Universities Very High (RU/VH)

Comprehensive: Four-year public and independent institutions with enrollment above 4,000. Carnegie categories - Baccalaureate, Masters or Doctoral.

Small: Four year public and independent institutions with full-time enrollment under 4,000; specialized institutions (art, engineering, technology, etc.); also includes two-year independent colleges and independent secondary schools.

Community College: Two-year public institutions.

Research (18%)
Comprehensive (16%)
Small (33%)
Community (33%)



Enrollment

>> Total Full Time Equivalent Students - Undergraduate

The number of FTE Students is calculated based on the credit and/or contact hours reported by the institution on the IPEDS 12-month enrollment (E12) component and the institution's calendar system, as reported on the Institutional Characteristics (IC) component. For purposes of this benchmarking, we are asking that you separately report graduate and undergraduates.



>> Total Full Time Equivalent Students - Graduate



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Filters

Filters have been specified for your platform to allow you to drill down in the data.

- ▶ Select any filter or combination of filters to compare yourself to a subset of data.
- ▶ If your filter selection returns too few accounts, you will see this informational message:

Your filter settings are not currently active because not enough accounts match the selection. Results are currently displayed without filter settings.

Anonymity

- ▶ By limiting the number of accounts returned, it is impossible for account identity to be determined and anonymity of data is always protected.
- ▶ If your filters do not return enough accounts, simply change your filter settings by:
 - Widening the range of a numeric filter
 - Turning off a filter by clicking on the X
 - Selecting a different filter option

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Using Filters

Click Change to activate the filters

- ▶ **Numeric filters:** Click **Add** to activate sliders then use slide bar to set a numeric range by moving the blue squares or enter a number in boxes.
- ▶ **Multiple choice filters:** Choose from the drop down menus.

Select and Set Filters...

Filter	Value	Apply	Cancel	(Filter Help)
Institution Category	Any			
Public/Private	Any			
Reporting System	Any			
Outsourced Services	Any			
Intercollegiate Athletics Reported	Any			
College/School of Medicine	Any			
Total FTE Students - Undergraduate	0  60K	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total FTE Students - Graduate	0  10K	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Net Tuition & Fees	100K  410M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peer Cluster	Any			New...

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Peer Cluster Filtering

Peer clusters allow you to select a group of institutions by name for comparison.

- ▶ You select the institution by name, but will not see individual data for any account.
- ▶ All data is presented in the aggregate, percentile format with a minimum of 5 institutions reporting on any given data point

Recommendation: Deactivate filters before using peer clusters

About Peer Clusters

A 'Peer Cluster' is a list of institutions you may select to compare yourself against.

Choose a name for your 'Peer Cluster' and then press OK. On the next screen, you will be able to select which institutions to include in this new cluster.

Create A New Peer Cluster...

Name:

Peer Cluster [New...](#)
Showing 14 of 14 metric(s) on this tab, v er metric.

Edit Peer Cluster...

The following institutions are included with you in this Peer Cluster... Search

	Name	State
Remove...	Alcorn State University	Mississippi

Showing 1 to 1 of 1 entries

The following institutions may be added to your Peer Cluster... Search

	Name	State
Add...	Alabama Agricultural & Mechanical University	Alabama
Add...	Alabama Southern Community College	Alabama
Add...	Appalachian State University	North Carolina
Add...	Arkansas State University-Jonesboro	Arkansas
Add...	Armstrong Atlantic State University	Georgia
Add...	Athens State University	Alabama

Showing 1 to 227 of 227 entries

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Reports

(Available After Data Collection Phase)

Click **Reports & Charts** tab from the Gateway Page

- ▶ Choose from a list of downloadable Word and PowerPoint reports that contain dynamically generated benchmarking charts.
- ▶ Filter settings from **Compare Institutions** will carry over, however, they can easily be modified if desired.

Reports can then be used to prepare for meetings, capture historical snapshots and communicate with others.

The screenshot shows the 'Reports & Charts' tab in the SACUBO system. At the top, there are three tabs: 'My Institution', 'Compare Institutions', and 'Reports & Charts'. Below the tabs is a green banner with the text: 'Click on any report in the list below to generate charts and graphs. Be sure to use the filters for true comparative insight.' Below the banner is a section titled 'Select and Set Filters...' which contains a table of filters. The table has two columns: 'Filter' and 'Value'. The filters listed are: Institution Category (Any), Public/Private (Any), Reporting System (Any), Outsourced Services (Any), Intercollegiate Athletics Reported (Any), College/School of Medicine (Any), Total FTE Students - Undergraduate (Any), Total FTE Students - Graduate (Any), Net Tuition & Fees (Any), and Peer Cluster (Any). Below the table is a section titled 'Select an Annual Report...' with a dropdown menu set to '2014'. Below the dropdown is a list of reports with expandable arrows: Executive Summary, General Report, Compensation & Benefits Report, Other Expenses Report, Total Expenses Report, Allocation of FTE Employees, All Expenses by Function Report - Private Institutions, All Expenses by Function Report - Public Institutions, and Effectiveness Report.

Filter	Value	Change...	(Filter Help)
Institution Category	Any		
Public/Private	Any		
Reporting System	Any		
Outsourced Services	Any		
Intercollegiate Athletics Reported	Any		
College/School of Medicine	Any		
Total FTE Students - Undergraduate	Any		
Total FTE Students - Graduate	Any		
Net Tuition & Fees	Any		
Peer Cluster	Any		

Select an Annual Report... 2014 ▾

- » Executive Summary
- » General Report
- » Compensation & Benefits Report
- » Other Expenses Report
- » Total Expenses Report
- » Allocation of FTE Employees
- » All Expenses by Function Report - Private Institutions
- » All Expenses by Function Report - Public Institutions
- » Effectiveness Report

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