

# Guide to Entering Your Facility Issues Benchmarking Data with the Excel Template File

Overview of the data entry spreadsheet

# Options to Enter Benchmarking Data

There are two ways you can enter your benchmarking data. You can use either or BOTH methods.

1. Use the Online forms

Best to use if you have one property, are benchmarking limited types of data, and have access to the data within your department.

2. Use the Excel template

Best to use if you have multiple properties and are copying data from other spreadsheets, and/or are emailing sections to other departments to complete.

*Regardless of which method you use to ENTER data, you can EXPORT your data to the Excel Template for your files.*

# First Download the Template File

## ■ Step-by-Step to Download Data File

1. <https://facilityissues.com>
2. Log In
3. Your benchmarking program will be listed on the left side of the page.
4. Hover your mouse over the program name and new links appear. Click the "Go To Survey" link to open the survey section.

The screenshot shows a user interface for the Facility Issues website. On the left, a list of enrolled surveys is displayed under the heading "SURVEY(S) ENROLLED IN". The surveys listed are: Facility Managers Roundtable, Museums & Cultural Institutions, Research Facilities, Utilities Council, Core Metrics, Critical Facilities, and Energy Use Intensity. A red box highlights this list. Below the list is a "PAYMENT STATUS" section showing "Participating -- Payment received" and a "Log Out" button. On the right, an "INSTRUCTIONS AND TIPS" section provides links to various guides and videos. A red box highlights a dropdown menu for "Research Facilities" with the "Go To Survey" link selected. A red arrow points from the text in step 4 to this "Go To Survey" link.

**SURVEY(S) ENROLLED IN**

- Facility Managers Roundtable
- Museums & Cultural Institutions
- Research Facilities
- Utilities Council
- Core Metrics
- Critical Facilities
- Energy Use Intensity

**PAYMENT STATUS**

Participating -- Payment received [Log Out](#)

**INSTRUCTIONS AND TIPS**

Pages with reference documents or videos will open in a new window

- Guide to the Facility Issues website: [PDF Video](#)
- Entering your benchmarking data with online forms: [PDF Video](#)
- Entering your benchmarking data with Excel template: [PDF Video](#)
- [Benchmarking data definitions and clarifications](#)
- [Tips for assembling your facility data](#)

• Guide to the Microsoft PowerBI website: [PDF Video](#)

• [Getting value from your benchmarking report](#)

**Research Facilities**

[Go To Survey](#) | [Members Area](#) | [Edit Properties](#)

# Download Template File (continued)

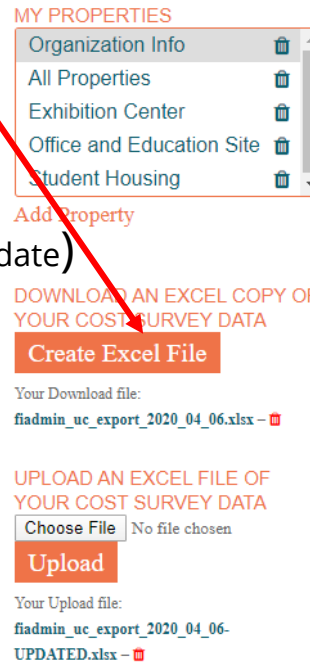
## ■ Step-by-Step Continued

5. Click the “Create Excel File” button to create a current data file. In a minute the file link will appear

(name = your user + group + export+ date)

6. Click on the file link to download it. (it will automatically go to your browser’s default download folder)

7. Open the Excel file (we are done with website for now)



MY PROPERTIES

- Organization Info
- All Properties
- Exhibition Center
- Office and Education Site
- Student Housing

Add Property

DOWNLOAD AN EXCEL COPY OF YOUR COST SURVEY DATA

Create Excel File

Your Download file:  
fiadmin\_uc\_export\_2020\_04\_06.xlsx

UPLOAD AN EXCEL FILE OF YOUR COST SURVEY DATA

Choose File No file chosen

Upload

Your Upload file:  
fiadmin\_uc\_export\_2020\_04\_06-UPDATED.xlsx

## COST SURVEY: MUSEUMS & CULTURAL INSTITUTIONS

Welcome to your cost survey.

This online survey is an important part of the benchmarking process. This survey contains a series of questions that are designed to collect data to assess trends and identify best practices for your group. The survey is divided into eight or nine sections, as shown in the navigation menu.

- You may complete the forms in any order.
- Each time you complete a question, a green checkmark icon indicates that your data has been saved. *You do not need to click a save button to save your data.*
- The information icon ⓘ is a valuable asset. Place your cursor over the icon to display detailed instructions and guidelines.
- The Survey Resources section (right column) also contains additional information you may need to complete the survey.

Go to my survey

# Excel Template – Opening the File

When first opening, you may need to enable editing or manually recalculate the sheet for data to display (check the site code and email to confirm it loaded)

**NOTE:** If you do not see your site code in cell C8 below after downloading data (or if it is showing 0), then press <Ctrl> + <Alt> + F9 keys.

Section	Percent Reviewed	Percent Completed	Use this column
Import This Section?			
F099			
rlambe@facilityissue			
Import This Section?			

# Excel Template Overview

- There are three types of worksheets in the file:
  - Instructions/Table of Contents
  - Organization Data Sheet
  - Property Data Tables
- The tabs are color-coded by topic (just for reference)
- Each data tab is formatted in a similar way:
  - Field ID
  - Question/topic
  - Your answer
  - Units
  - More info/description of what to enter
- Tables allow 50-500 properties
  - Organization

# Excel Template – Instructions Sheet

The Instructions Sheet is:

- A Table of Contents
- A progress tracking sheet
- The data upload controls

Link with some instructions  
(for those folks you may ask to complete sections)

“Guides” show progress by section and unanswered “important” questions

List of all the available sections (tabs) with hyperlink to that section

FM BENCHMARKING SURVEY: Cultural Institutions			
DATA TEMPLATE			
Use these worksheets to collect and organize your data. Download instructions for this template: <a href="https://facilityissues.com/main/references/excel-data-template/">https://facilityissues.com/main/references/excel-data-template/</a>			
This survey data template is provided to help you collect and organize your data for the Facility Issues Benchmarking program. You are free to share copies with others inside your organization who are providing or use the data, but copies are not allowed to be shared with persons outside your organization. (Facility Issues © 2020- for Participants' Internal use only)			
<b>IMPORTANT:</b> When ready to import data from this file, select YES (in column C) for those items that you wish to upload - data from this file will replace that entire section (and only that section) in the system.			
Section			
Site code assigned by Facility Issues; for information only.		F100	
Contact person's email - edits must be made on Facility Issues website.		rlambe@facilityissue	
ORGANIZATION & DEPARTMENT INFORMATION		Import This Section?	
A	<a href="#">Section A: Organization Info &gt;&gt; Demographics (Required)</a>	No	No
B	<a href="#">Section B: Organization Info &gt;&gt; Property Staffing</a>	No	12
C	<a href="#">Section C: Organization Info &gt;&gt; General Costs</a>	No	3
PROPERTY INFORMATION		Import This Section?	
	<a href="#">Property Info &gt;&gt; Definitions (For Sections F-K)</a>	Definitions Only	# Properties: 4
F	<a href="#">Section F: Property Info &gt;&gt; Demographics (Required)</a>	No	25
G	<a href="#">Section G: Property Info &gt;&gt; Areas</a>	No	19
H	<a href="#">Section H: Property Info &gt;&gt; Space Types</a>	No	0
I	<a href="#">Section I: Property Info &gt;&gt; Occupancy and Use</a>	No	12

NOTE: If you do not see your site code in cell C8 below after downloading data (or if it is showing 0), then press <Ctrl> + <Alt> + F9 keys.

Want Facility Issues to compile your benchmarking data for you?

Section Reviewed    Impt. Questions    Percent Completed    Use this column to track who completes each section

Data upload controls – discussed later

# Excel Template – Organization Data

Each data tab is formatted in a similar way (columns from left to right):

- Field ID (for our reference)
- Question/topic
- Your answer
- Units of measure
- More info/description of what to enter

First question on the sheet is for progress tracking - whether you reviewed or are going to skip this section

Link to return to contents tab

ID	Topic / Question	Your Answer/Data	Units	Clarification
	<b>Have you reviewed the following data for accuracy?</b>		List	Prior year's data may have been pre-filled and should be confirmed.
		<b>Administration</b>		
ORG_NAME	<b>Organization name and address *</b>	Example Museum	Text	Used for administration only.
ORG_SHARE	<b>Ok to share your name? *</b>	OK to identify us on the charts	List	Are you willing to share your sitecode with others in the group? Used for administration only.
ORG_ID	3-6 character acronym to use in the report (If you said OK to ID on the charts)	FAL1	Text	OPTIONAL: If you enter a value, it will be the label used on the charts as your sitecode instead of the anonymous one assigned to you. NOTE: Others will see this also.
		<b>ABOUT YOUR ORGANIZATION</b>		
ORG_TYPE	<b>Type of organization *</b>	Cultural-Science and Technology Museum	List	Select the one category that best describes the primary industry/focus of your organization.
FM_ORG	<b>Where does the facility management report? *</b>	Finance	List	Select the best match of the top level executive who's organization includes facilities management (and facility projects /other services reported in this benchmarking survey).
	<b>Facility Maintenance Staffing Approach *</b>	Outsourced- all but a few key staff	List	Select the option that best matches the approach for how you staff your facility maintenance and operations group.

Reminders and error messages

Important questions are in bold with \* at end

Your current data from the website – overwrite to edit



# Excel Template – Property Tables

Each data table is formatted in a similar way (shaded heading rows):

- Question/topic
- Field ID (for our reference)
- Units of measure
- Your data

First 2 columns are the unique property ID and property name used to track each property

Links to contents tab and data clarifications on separate tab

## FM BENCHMARKING SURVEY: Cultural Institutions

### Section F: Property Info >> Demographics (Required)

[Return to Table of Contents](#)

In this section, you will define your properties by facility or by any grouping you wish (section of a building, individual building, group of buildings, etc.) and classify them by type and other attributes that can be used to filter the reports. Other Property data sections will use the same list of properties. See Property Info Definitions tab for clarifications of data fields. You can edit any field and copy/paste (NOT CUT/paste) data from other sources but do NOT change rows 1-8.

[See Definitions](#)

#### PROPERTY IDENTIFICATION

Property ID *	Property Name	Property Address	Property Location - Postal code*	Include in Benchmarking*	Number of Days in Service*	Operating Company or Business Division	Property Type *	Property Nature	Property Setting
BLDGID	BLDGNAME	PROP_ADDR	PROP_POSTAL	PROP_INCLUDE	PROP_DAYS	PROP_DIV	PROP_TYPE	PROP_NAT	PROP_SET
Text	Text	Text	Text	List	Days	Text	List	List	List
ALL	All Properties	Prior Year's Data						Multiple buildings grouped together	Central Business District
GALLERY	Exhibition Center	Exhibition Center					Gallery/Exhibit Hall	Stand alone or single building	Central Business District
OFFICE	Office and Education Site	Office and Education Site					Office/Educational Campus	Stand alone or single building	Other Urban Area
HOME	Historic residence	Historic residence					Other	Stand alone or single building	Suburban Area

Important fields have dark background and \* at end

Enter your data by row – can use all normal Excel formulas, lookups, and copy/paste from other sheets – NO CUT/PASTE!

# Upload the Excel Template Data

- You can upload your template file when ready – you will load by section so do not have to have entire form completed or even have all sections completed in the same file.
  1. First identify which sections of the template to load by selecting Yes in the import column (can be 1 or more)
  2. Then login to FacilityIssues.com and go to the survey page
  3. On left of page choose the file on your computer and click Upload
  4. Wait a minute and an error message or success message will display at top of page

Select "Yes" for sections to upload

Section	Import This Section?	Section Reviewed
Person's email - edits must be made on Facility Issues website.	rlambe@facilityissue	
PERSON INFORMATION	Import This Section?	Section Reviewed
A: Organization Info >> Organization Demographics (Required)	Yes	Yes
B: Organization Info >> Staffing	No	No
C: Organization Info >> Budget	No	No
D: Organization Info >> Technology Used	No	No



UPLOAD AN EXCEL FILE OF YOUR COST SURVEY DATA

Choose File No file chosen

Upload

**SUCCESS:** Your file was uploaded and processed successfully. Thank you!

# QUESTIONS OR PROBLEMS?

Email me or call:

Robert Lambe

[Rlambe@FacilityIssues.com](mailto:Rlambe@FacilityIssues.com)

315-601-6010