Guide to Entering Your Facility Issues Benchmarking Data with the Online Forms

Overview of the online data entry forms

FACILITY
ISSUES

Option 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.

FACILITY ISSUES

From the "My Account" Page

- Step-by-Step Benchmarking Data Entry
  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.

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**
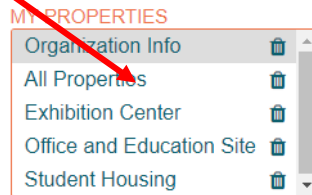- Getting value from your benchmarking report

Research Facilities
Go To Survey | Members Area | Edit Properties

FACILITY ISSUES

Overview of Online Survey Screen

- Overview of the online data screen

Select whether data is for your organization or which property

Menu of data forms to display in the main panel – this list changes based on whether organization or a property selected

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 – 🗑

Data file download and upload controls

COST SURVEY: MUSEUMS & CULTURAL INSTITUTIONS

NEXT SECTION »

Welcome to your cost survey.

This online survey is an important part of the benchmarking process. It contains a series of questions that are designed to collect the data we need to assess trends _____ group. The questions are divided into _____ the navigation area to the left.

Main data panel

- You may complete the forms in any order.
- Each time you complete a question, a green check mark ✔ will appear to indicate that your data has been saved. *You do not need to click any other button to save your data.*
- The information icon ℹ is a valuable asset. Place your mouse over this icon to display detailed instructions and guidelines.
- The Survey Resources section (right column) also contains links to additional information you may need to complete the forms.

Go to my survey

Return to My Account

SURVEY LINKS
▸ Organization Information
▸ FM Practices
▸ Operations and Services
▸ Performance Levels
▸ Sharing and Feedback

SURVEY RESOURCES
• Unfinished Fields

EXPLANATION
ℹ Additional information and instructions
✔ Saved data
⚠ Error saving data
✱ Important Field

Survey resources based on the selected form and other form reference info

FACILITY ISSUES

Data Entry – Online Form

- Step-by-Step instructions for using the online forms

  1. First, select if you want to enter data for your organization or a specific property – lets start with organization

  2. The form usually opens to the organization view, but you can click on "Organization Info" to change back from any property view.

  3. This will set the sections in the survey links to those that apply to the organization.

  4. Click the section heading once to open the list of forms.

  5. Click on the desired section to continue.

Data Entry – Online Form

- Step-by-Step (continued)
  6. The survey forms work the same as before. Enter your data in appropriate fields.

Section B: Organization Information » Staffing Information

« PREVIOUS SECTION   NEXT SECTION »

Purpose: This section includes all your facility organization staff including facility operations, project management, and supporting staff. For the purpose of this section "staff" includes both internal and contract FTE who are resources for your organization. Please report FTE based on normal ~40/hour work week (not including paid overtime except where shown); enter 0 or leave blank if a staff type does not apply. This data will be aggregated into categories or used in per FTE metrics and your detailed data will not be reported. Do not include contractors not "assigned" to your account who only do periodic work such as project-specific staff or services such as a plumber called for repair twice a year.

expand all | collapse all

B1   FACILITIES MANAGEMENT

ⓘ Facility Operations Managers - Internal: [   ] Contract: [   ]

ⓘ Facility Operations Supervisors - Internal: [0.0] * ✓ Contract: [   ] *

ⓘ [   ] * Contract: [   ]

Scheduling of crew activities, job planning, prioritization of work assignments, and preventive maintenance program management if not done by individual Supervisors. or working leaders.

Please enter a number with 1 decimals in this field

ⓘ F [0.0] * ✓ Contract: [0.0] * ✓

ⓘ Grounds Maintenance Worker - Internal: [   ] Contract: [   ]

SURVEY LINKS

▼ Organization Information
  Organization Info
  Staffing Information
  Overall Budgets

▶ FM Practices

▶ Operations and Services

EXPLANATION

ⓘ Additional information

✓ Saved data

⚠ Error saving data

* Important Field

Fields with red * are considered important to complete

Click the small blue "i" for information about the data to be entered

As you enter data, there will be a little green check as it is saved (short lag)

FACILITY ISSUES

Data Entry – Online Form

- Step-by-Step (continued)
  7. When you are finished with your organization data or a property, the "unfinished fields" link will identify if any "important" fields are still blank.

Data Entry – Online Form

- Step-by-Step (continued)
  8. Select a property (or "all properties" if you report your total facilities as one item) for the property related data sections. You can also add/delete properties as you wish.

MY PROPERTIES

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

Add Property

Property ID

Property Name

Add

Add property here – the ID is used for internal tracking and the name is shown on your list above

Click the trash icon to delete a property (there is no undo)

COST SURVEY: MUSEUMS & CULTURAL INSTITUTIONS

Section F: Property Information » Property Demographics

NEXT SECTION »

Purpose: In this section, you will classify your properties by type and other attributes that can be used to filter the reports. NOTE: You can define your properties by facility or by any grouping you wish (section of a building, individual building, group of buildings, etc.) and add/remove properties using the links on the top left of this page. All Property data sections will use the same list of properties.

expand all | collapse all

F1   **General Info**

ℹ️ Property Address*   Prior Year's Data   ✔

Return to My Account

Property data sections

SURVEY LINKS

▼ Property Information
  Property Demographics
  Property Areas
  Space Types
  Occupancy and Use
  Operating Expenses
  Utility Usage & Waste
  Capital Assets & Systems
  Work Orders

SURVEY RESOURCES

FACILITY ISSUES

Data Entry – Online Form

- Step-by-Step (continued)
  9. When you are finished, we suggest you download a copy of your data.
     - Click "Create Excel File" to create a current data file
     - In a minute the file link will appear
       (name = your user + group + export+ date)
     - Click on the file link to download it.

DOWNLOAD AN EXCEL COPY OF YOUR COST SURVEY DATA

Create Excel File

Your Download file:

fiadmin_ci_export_2020_04_07.xlsx –

FACILITY ISSUES

QUESTIONS OR PROBLEMS?

Email me or call:

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