CASE BENCHMARKING TOOLKIT
How to Guide
February 2018
CASE BENCHMARKING TOOLKIT LOGIN PAGE
1. Link: benchmarking.case.org
2. Enter your CASE username and password

3. Click 'Forgot Password' to reset password
4. All surveys that are live and that you are eligible to participate in will appear on this page. Click on a survey to access it.
CASE BENCHMARKING TOOLKIT SURVEY
5. Click on a section title to answer the questions in that section.

6. No. of questions answered / No. of questions in the section

7. Click here to Download the MS Excel version of the survey. This comes handy if you wish to collate your response offline or if multiple colleagues supply information for the survey. Once you have compiled the data on the Excel sheet you can enter it online. You can also see a survey indicator in green, above the download button, which tells you when the survey will close.
8. This section highlights those institutions that have completed the survey in green and has a list of all the institutions who were invited to participate.
9. Enter your answers in the fields provided for each question.
10. A pop-up box will come up when you hover your cursor over the fields informing you about the type of response required. E.g. text only, numbers, percentage.
11. Clicking on the small clock-face icon will open a pop-up box. This box will contain your answers to the same question from past surveys. You can click on 'Use This Response' to duplicate an answer from a past survey.
12. Check this box if you are not able to answer a question or if a question does not apply to you. However, you must answer all drop-down questions.
13. You can click scroll over the 'Question mark' icon to access help text and question guidance to help you answer the question accurately.
14. When you complete a section, be sure to click on the green 'Save Responses' button. This will record your responses. You do not need to complete any survey in one sitting. Saved responses will be available for editing anytime you log into a survey, until the entire survey is submitted. And each survey section has a text box for you to add any additional comments about your responses.
15. Once all sections have been completed and saved, click on the ‘SUBMIT AND LOCK’ button for your data to be recorded. If you need to make any changes to the data recorded in the survey after submitting it, please email research@case.org.
CASE BENCHMARKING TOOLKIT REPORTING
16. Clicking on the ‘Reports’ tab will list the surveys that have been closed. You can click on the ‘Report’ button to generate tables and charts for a particular survey.

You can create a ‘Multi-Year’ report for YOUR INSTITUTION as soon as you have submitted your survey. However you MUST wait for official CASE communication announcing that the toolkit is ‘ready for institutional benchmarking’ before creating any ‘Multi-Institution’ reports.

CASE query and clean the data once all institutions have submitted their surveys. Your ‘Multi-Institution’ benchmarking report may be generated using data that has not been checked and verified if you generate ‘Multi-Year’ reports prior to our communication to you. Furthermore, we may deactivate your account if we notice that a ‘Multi-Institution’ report was generated on the toolkit prior to CASE’s official announcement.
17. Clicking on the ‘Report’ button will open a pop-up box. You have the option to generate two types of reports – ‘Multi-Institution Report’ or ‘Multi-Year Report’. As mentioned earlier, please create ‘Multi-Institution’ reports only after the data has been queried, checked and updated.
18. If you click on ‘Multi-Institution Report’ you can generate reports by three filtering options: ‘Institution Name’, ‘Mission Group’ or ‘Survey Question’.
19. Clicking on ‘Institution Name’ will open a pop-up box with a list of all participating institutions. You can select five or more number of institutions of your choice and benchmark your institution’s performance against them as a group and against each individual institution.
20. Clicking on ‘Mission Groups’ will open a pop-up box with a list of all relevant mission groups. You can select the mission groups of your choice and benchmark your institution’s performance against the mission group and each individual institution. The mission groups must have five or more member institutions as participants in the survey.
21. Clicking on ‘Survey Question’ will open a pop-up box with a list of survey questions and options you can filter the participants by. You can create a group by selecting institutions based on the answers recorded for particular questions and benchmark your institution’s performance against this group and each individual institution. The group must have five or more member institutions who have answered the question that you have used as a filter.
24. You can add more than one filter i.e. institution AND mission groups AND question filters to generate a report. But the report will only be generated, if after taking into consideration all the filters, there are five or more institutions who meet all the criteria.

22. Click on ‘Clear All’ to reset the filters to none

23. Click on ‘Run Report’ to generate your report.
25. Some reports may take a few seconds to generate.

26. Click here to download the report tables in an MS Excel format. You can then do your calculations on this dataset. To download the full dataset, select the ‘Multi-Institution’ filter and check ‘Toggle All’ and run a report.
### International CASE Alumni Relations Survey (ICARS) 2015

#### Confidentiality

Please respect the confidentiality of this data. Your colleagues trust that you will use this information for internal purposes only and will not disclose, share, or circulate the contents of the reports with anyone not associated with the participating institutions. Thank you.

Returned data for 10 institutions in 10.873 seconds.

To see entire result set, click in to table and use arrow keys or scroll to bottom and use scrollbar.

<table>
<thead>
<tr>
<th><strong>A</strong></th>
<th><strong>FIRST, PLEASE PROVIDE YOUR CONTACT AND SET-UP DETAILS</strong></th>
<th><strong>MIN</strong></th>
<th><strong>MEAN</strong></th>
<th><strong>MAX</strong></th>
<th><strong>&quot;Your Institution&quot;</strong></th>
<th>A3135</th>
<th>A3223</th>
<th>A3896</th>
<th>A4613</th>
<th>A4635</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-99</td>
<td>If your answer to AS was ‘Other’, please specify the time period covered by your responses to this survey.</td>
<td></td>
<td></td>
<td>A-99</td>
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</tbody>
</table>

27. Click on the vertical bar chart icon to see the chart for that particular question.

28. The report will generate tables with columns for minimum, mean, maximum and each institution’s anonymised response.
29. If your institution is included in the data report (meaning it satisfied your filter parameters), it will be highlighted in GREEN. If there is no green highlighting, your institution is not included in the data set. Most surveys call for institutional anonymity in reporting, therefore you will see your institution's name and data but all other respondents' data will be labelled anonymous—with a randomly generated letter and number code that will change every time you run or download a report. Some surveys, however, call for transparency and do have institutions identified by name in the reports.
30. Clicking on the ‘Multi-Year’ tab will allow you to generate reports for your institution over time if you have participated in the same survey more than once.
31. Check the boxes to select which years you want the report to cover.
This report will generate tables with columns for each survey year selected and will only show data for your institution for all the years selected. It will not show you overall industry trends across time.
33. Clicking on the vertical bar chart icon will open a pop-up box with the chart for that question.
34. Right click on the chart to save the chart as an image or to copy the chart as an image.
35. Highlight the table with your cursor and simply copy and paste in MS Excel to save a particular table.
CASE BENCHMARKING TOOLKIT LOGOUT PAGE
Click on ‘Logout’ on the top left corner of your screen to end the session. Thank you.