



# **Reporting Tool: User Guide**

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# eMandate Reporting Tool – User Guide

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## 1 How to access the Web-based reporting tool

The eMandate reporting tool is accessed through the Home Page of the eMandate website. The address of the eMandate website is [www.emandate.co.uk](http://www.emandate.co.uk). Please enter this address in your internet browser and you will be taken to the home page eMandate website.

From the eMandate home page select the [eMandate Reporting](#) link in the box on the left-hand side, towards the top of the page. This will take you to the login page of the reporting tool.

### 1.1 Logging in and out

At the login page you be prompted to enter your User ID and Password, which should already have been emailed to you. After you have entered your login and password, please click on the Login button to enter the reporting tool.

To logout of the eMandate reporting tool, please click on the Logout button at any time on the left-hand side of the screen. This will return you to the home page of the eMandate website.

If you are new to eMandate and would like a login and password; have not received; have lost, or mislaid your User ID and/or Password, please contact the eMandate helpdesk on 020 7336 9279/9252 or email [emandate@ipdglobal.com](mailto:emandate@ipdglobal.com) .

### 1.2 Terms and Conditions

When you log on to the reporting tool for the first time, you will be taken directly to the *Terms and Conditions* page.

It is important that you read these before you proceed to use the reporting tool for the first time. The Terms and Conditions page will only appear on the first occasion that you log on but are always available for reference by following the relevant link on the left-hand side of each page.

Once you have read the Terms and Conditions you must agree to them by selecting the relevant radio box at the bottom of the page before you may proceed to use the reporting tool. If you do not agree to the Terms and Conditions you will be returned to the Home Page of the eMandate website.

### 1.3 Navigation

Navigation through the various pages of the eMandate Reporting Tool is easy – there are links to each page of the reporting tool on the left and simply select the relevant link to be taken to the relevant page.

### 1.4 Changing the view, exporting or printing

Above the main body of the reporting area of the Executive Summary, Comparative Analysis and Data pages there is a menu bar used to change the view, export data and print.

- The first drop-down on the left controls the **view**. The view will default to 100% but you can increase or decrease the view size by selecting a different value from the drop-down.
- The second drop-down controls the **export format** e.g. Excel, PDF etc. for all the material on the page view area. Once you have selected an appropriate export format, please select the *Export* button to export the executive summary to your chosen format.
- The **print** icon will enable you to print the executive summary direct from the reporting tool without having to export the data to another format first.

## 2 The eMandate Reporting Tool Home Page

The home page is where you choose the settings that govern the data and benchmark groups that are displayed throughout the remaining pages of the reporting tool. These fall into two categories – *Overall default settings* and *Settings for executive summary*.

### 2.1 Overall default settings

If you are using the reporting tool for the first time, you must set the overall default settings before the menu bar will appear on the left-hand side of the page that will enable you to navigate to the other pages of the tool.

- **Selected college.** Once set, it will default to the name of the college/institution that you select each time that you log in, but you may also choose to look at the data for any other college/institution instead at any time. If you wish to do so, simply select a different college from the drop-down on the home page.
- **Selected year.** The year that you select determines the data that appears as the 'base' year in the Executive Summary and Comparative Analysis pages. It will default to the current (most recent) year but you may wish to select a different year for historical analysis.
- **Pre-defined benchmark groups.** You may select any of our pre-defined benchmark groups from the drop-down or any benchmark groups that you have created yourself. Please refer to the *Create/Select Benchmark Peer Group* section (section 6) for details on how to do this.

Once you have selected your overall default settings you may save these by using the *Save as default settings* button. The next time that you log on these settings will then automatically appear as default.

### 2.2 Settings for executive summary

- 1) **Additional years for historical analysis.** The 'base' year that you have selected above will automatically appear on the executive summary and throughout the remaining pages of the website. However, where applicable, you may also wish to show data from additional years on the executive summary. The available years will appear in the left-hand column and you may select up to three of these (or deselect) using the arrow buttons.
- 2) **KPIs to appear on the Executive Summary.** You may choose a maximum of 12 KPIs (key performance indicators) from a selection of 43 to appear on the executive summary. When you first enter the reporting tool, it will default to 12 of these. Please use the left and right arrows to select and deselect those that you would like to display. Please note that not all colleges will have submitted all the required data and therefore some of the KPIs that you choose may not display a full data set on the executive summary.

### 3 Executive Summary

On the home page you selected a college, a 'base' year, a pre-defined benchmark group, additional years for historical analysis (optional) and up to 12 KPIs. Where available, the data relating to your selection appears on the Executive Summary.

#### 3.1 The header of the Executive Summary

The report header contains important information about the college relating for the 'base' year, namely:

- College Name
- College Type e.g. General Further Education etc.
- Location Type e.g. Urban, Rural etc.
- Region (or Country if Scotland or Wales)
- No. of FTE Learners
- Gross Internal Area (GIA)
- Total Property Costs
- Insurance Replacement Value (IRV)

#### 3.2 The body of the Executive Summary

For the KPIs that you selected from the home page, the body of the report will contain the following information:

- The heading and description
- The college values for 'base' year and any additional years that you selected from the home page
- The lower quartile, median, upper quartile and mean values for the benchmark group for the selected year
- The difference between the value for the selected college for the base year and the median value
- The % change for the value for the college between the base year and the previous year

Where no data is displayed this means that there is no data available for the selected college, year or benchmark group.

## 4 Comparative Analysis

The comparative analysis page enables you to look at any indicator, measure or ratio in greater detail. This includes all the KPIs that can be displayed on the executive summary. As there are in excess of 150 measures that can be selected, they have been split into the same sub-categories that appear on the data collection templates.

### 4.1 Selecting a measure

The following measure sub-categories have been used:

- Building condition & maintenance
- Business measures
- Component revenue costs
- Cost profiles
- Energy costs & consumption
- Estate profile
- Property management costs
- Space & utilisation profiles
- Total property costs
- Value & capital investment
- Water costs and consumption

Once you have chosen the appropriate measure category from the *Measure Category* drop-down, you should select the measure that you wish to look at from the *Measure* drop-down. The data for that measure will then be displayed below. The information for the chosen measure will relate to the college and 'base' year that you have chosen from the home page, in the context of the benchmark group that you have also selected from the home page. Where available, it will always show the three years' data preceding the base year.

### 4.2 Interpreting the data

The data will be displayed in three formats:

- A **line graph** showing the values for that measure for the benchmark group. Each point along the graph represents a college within the data set. The selected college is shown as a black triangle. If there is no black triangle this means that the selected college has not provided the relevant data for the selected year.
- A **table** showing the data for the selected college; the upper and lower quartiles, median & mean for the benchmark group and the number of colleges included in the data set for that measure.
- A **block graph** showing the performance of the college against the benchmark median, the upper and lower quartiles.

## 5 Data & Ratios

The Data & Ratios page enables you to view and export the data and ratios for the selected college. All data for all years will be displayed. In order to make the data set more manageable, it has been sub-divided into the following sub-categories:

- DATA ITEMS
- BUILDING CONDITION & MAINTENANCE
- BUSINESS MEASURES
- COMPONENT REVENUE COSTS
- COST PROFILES
- ENERGY COSTS & CONSUMPTION
- ESTATE PROFILE
- PROPERTY MANAGEMENT COSTS
- SPACE & UTILISATION PROFILES
- TOTAL PROPERTY COSTS
- VALUE & CAPITAL INVESTMENT
- WATER COSTS AND CONSUMPTION

With the exception of *Data Items*, these sub-categories are the same as have been used in the Comparative Analysis section.

In order to view the data under each category, click on the cross in the box beside each category. This will reveal all the data for each category for the selected college and the plus sign in the box will turn to a minus sign. If you click on this again, it will hide the data and the minus sign will return to a plus.

You may reveal and hide as many categories of data as you wish to look view at the same time.

## 6 Create/Select Benchmark Peer Group

This page enables you to view existing benchmark peer groups and view, edit, create and delete your own bespoke benchmark peer groups. This is a very important facility which you will use increasingly as you familiarise yourself with the eMandate reporting tool.

Any benchmark peer groups that you have previously created and saved will be displayed when you enter this page. You may view, edit or delete these using the same techniques described below in this section.

### 6.1 Creating a new benchmark peer group

Before you create a new benchmark peer group you must first enter a name for your group in the space provided below the heading *Create new benchmark group*. The name that you choose should have some meaning as it will be displayed throughout the reporting pages of the web tool and on the reports themselves.

Once you have entered a name, select the *Create New Benchmark* button and you will be taken to the create benchmark facility. You will then be presented with a number of optional filters in order to create your benchmark peer group.

*NOTE: you may select any combination of filters in order to create your benchmark group and view or save the group at any time by using the buttons at the bottom of the page.*

#### 6.1.1 Select college Type

A number of predefined college types have been created and you may select one, more than one or all of these. Most colleges/institutions in England, Scotland and Wales fall into the category *General Further Education Colleges* but you may wish to look at a more specialised selection of colleges.

You can select/deselect any combination of college types using the left and right arrows.

#### 6.1.2 Select region

You may choose any selection of regions in England, Scotland and Wales from the list in order to compile your benchmark group.

You can select/deselect any combination of countries or regions using the left and right arrows.

#### 6.1.3 Select location type

The location type of your college may have a significant bearing on the characteristics of your estate.

You may therefore select any combination of location types – Rural, Urban etc. – using the left and right arrows.

#### **6.1.4 Key college size parameters**

A selection of 10 predefined college size parameters has been set up for users. To select a criterion you must press the *Add Criteria* button and this will apply a filter to your selection based on the upper and lower limits that you have selected for that parameter.

#### **6.1.5 Additional Measures**

An advanced feature of the benchmark creation tool is that you can apply up to two additional filters to individual measures and data items.

This is particularly useful when undertaking detailed analysis of individual measures e.g. if you wished to create a benchmark group with a similar proportion of their GIA in conditions A & B to your own.

The measure and data categories uses are the same as those used on the comparative analysis page and it will be useful for you to refer to the values returned on this page to determine the lower and upper limits of your selection.

Once you have selected the additional measures and data items that you wish to use as additional filters, you must click on the *Add Measures* button to apply these.

## **6.2 Fine tuning your benchmark selection**

As referred to at the start of this section you may view and edit the benchmark groups that you have created at any point.

In order to see the list of colleges that you have selected you must use the *View Benchmark Group* icon at the bottom of the page. This will take you to a list of the colleges that satisfy the criteria that you have selected.

You may exclude any colleges from this selection by placing a tick in the exclusion box beside the name of each college in your list.

**IMPORTANT NOTE: all filters are dynamic and relate to the data returns for the selected year. Therefore the benchmark selection will change according to the data returned for the selected 'base' year on the home page.**

Once you have viewed your list of benchmark colleges and made any exclusions that you wish to make, you can return to your selection criteria by selecting the *Back to filters* icon at the bottom of the page. You may repeat these steps as many times as necessary.

Once you have completed setting up your benchmark group you should select the *Save Benchmark Group* icon at the bottom of the page and the next time that you return to the Create/Select Benchmark Peer Group page your new benchmark group will appear in the list of available benchmarks.

## 7 Frequently asked questions

This section will be updated periodically based on the answers to questions that we receive from colleges.

- *Q: How do I create a list of peer colleges without using any of the advanced features?*
- A: In the *Create/Select Benchmark Peer Group* page select all college types to provide you with a list of all colleges; then go to the bottom of the page and select *View Benchmark Group*. Finally deselect all the colleges that you do not wish to include (this may take a few minutes) and finally save.
  
- *Q: How do I view the data for another college?*
- A: To see the data for another college, simply select a different college from the drop-down list beside the name of the college that is currently selected on the home page.
  
- *Q: What is the significance of the 12 default and 43 KPIs available on the Executive Summary?*
- A: Based on IPD's experience in the higher education sector, these have been selected as the most important measures derived from the data set. We anticipate that this list will evolve in line with changes to the data set itself and overall priorities.
  
- *Q: How widely would you suggest that I circulate the results from eMandate for my college?*
- A: The overall aim of eMandate is to help to improve estates and facilities management in the further education sector and therefore we would suggest that you circulate the results as widely as possible. In particular we would suggest that you provide at least a copy of the executive summary to the College Principal, Governors and Head of Finance.
  
- *Q: Who should I contact if I have a suggestion to make regarding the future development of eMandate?*
- A: Please contact the eMandate helpdesk on 020 7336 9279 or email us at [emandate@ipdglobal.com](mailto:emandate@ipdglobal.com) and we will be very pleased to discuss your proposals with you.
  
- *Q: How can I obtain a more in-depth analysis of the eMandate results for my college?*
- A: Under such circumstances we would suggest that you obtain an *Estate Performance Review* from IPD. Please refer to our Support Services leaflet in this respect.
  
- *Q: I have made some selections from the Home Page but nothing is happening. What should I do now?*
- Under these circumstances we would advise a little patience. It takes a little time for your computer to 'cache' the data for the selections that you make on the home page and this will depend on the processing speed of your computer, but may take a few minutes. Generally, desktops will take less time than laptops. Once the relevant data has been 'cached', you

should be able to quickly navigate between the relevant pages. However, if these problems persist for more than a few minutes, please contact the helpdesk on the number above.